Infinx Bulk Uploads Onboarding V1.0

Overview

The Bulk Upload function withing the Infinx Prior Authorization Software (IPA) provides the user with the flexibility to upload multiple cases at once via a .CSV file in a predetermined format.

Template Requirements

Below are the mandatory and optional fields, and standard format examples to create a case successfully in IPA.

 

Bulk Upload Template Do’s and Don’ts

* Ensure all mandatory fields are completed.
* Check to make sure the formats match the examples provided (specifically dates).
* Date format for Date of Service can be provided in any of the below formats.

"yyyy/MM/dd'T'HH:mm:ss" | "yyyy/MM/dd 'T'HH:mm:ss" | "yyyy/MM/dd'T'HH:mm:ss'Z'" |"yyyy/MM/dd 'T'HH:mm:ss'Z'"|"MM/DD/YYYYHH:MM:SS"| "MM/DD/YYHH:MM:SS" |"MM/dd/yyyyHH:mm:ss" | "MM/dd/yyHH:mm:ss" | "YYYY/MM/DDHH:MM:SS" | "YY/MM/DDHH:MM:SS" |"MM/dd/yyMM:SS"

* Ensure that each row has a Unique Accession Number, duplicate Accessions in the file will cause IPA to override the first Accession that was created.
* Ensure that Accessions that have been uploaded in the past are not repeated. If an Accession number is entered and it already exists in IPA then:
1. If an existing case is OPEN, IPA will OVERRIDE the old case
2. If an existing case is COMPLETED, IPA will CREATE a New Case with the same Accession.
* Multiple CPT’s or ICD’s should be entered in the same row for the same case.
	+ Each CPT Section has 4 columns. The standard template had provision for 3 CPT’s to be added (12 Columns). If additional CPT’s need to be added, insert another section of 4 columns, copy the headers and increase the numerical value in the headers. Only a maximum of 5 CPT’s can be provided.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| CPT\_Code\_2 | Modifier\_2 | Body\_Part\_2 | CPT\_Description\_2 | CPT\_Code\_3 | Modifier\_3 | Body\_Part\_3 | CPT\_Description\_3 |
| 74178 |  |  |  | 74160 |  |  |  |

* Each Insurance Section has 6 columns. You can add up to 3 insurances in the standard template. However, if additional Insurances are required, the below 6 columns will need to be added. **Only a maximum of 5 insurances can be added.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Group\_Number\_2 | Group\_Name\_2 | Insurance\_Name\_2 | Insurance\_Phone\_2 | Member\_ID\_2 | Policy\_Number\_2 |
|  | Group 2 | UHC Test | 909-090-9090 | 1111111 | 11 |

* Indicator needs to be populated with the product type. Select 1 for Prior Authorization Requests and 2 for Insurance Verification & Benefits.
* If you need to create a prior authorization case and an Insurance Verification & Benefits case for the patient, you will need to create 2 duplicate rows and tag the first row as 1 and the second row as 2 in the Indicator column.

Method of Integration

Direct Upload

Option to use the bulk upload functionality in IPA to directly upload the .csv file at your convenience. This is a simple 3 click process to upload the file.

Upload Steps

1. Create the .csv file.
2. Login to IPAS using your credentials.
3. Select “New Case”.



1. Select “Bulk Upload”.
2. On the pop-up screen, Select “Upload CSV”.



1. Browse to the location of your file and open it.
2. Wait for a confirmation screen to pop up confirming the success of each case. **Do not close the browser.** (This can take a few minutes depending on the number of cases being uploaded).
3. Final status notifications:
* **Successful** – This is when a case is successfully created.
* **Partially Successful** – This implies that the case is in the Draft bucket due to some missing information.
* **Failed** – This status means that First Name / Last Name/ Date of Birth or Accession Number is missing.