SPI/Batch Registration - Supplemental Guide

Description: The information in this guide is to be used in conjunction with the _Carelon Standard Provider Data Exchange Layout for CA LEA_ and the CA TPA Batch Registration Guide. While each template obtains data independent from each other, the file templates and their enhancements follow the same rules (except for the pre-formatted "save as" noted in the grid below). These templates were enhanced using Macro-Enabled formatting to automate some of the file processes.

Note: The template file must be saved to a secure, or trusted, location, which will enable the Macro and allow the "Export" button – located on the Export Tab - to become operational. While each LEA/Vendor may have unique security, please see the below links for troubleshooting purposes. If you need further support enabling Macros, please engage your IT Resource.

- o **Windows**: https://support.microsoft.com/en-us/office/enable-or-disable-macros-in-microsoft-365-files-12b036fd-d140-4e74-b45e-16fed1a7e5c6

- o **Mac**: https://support.microsoft.com/en-us/office/enable-or-disable-macros-in-office-for-mac-c2494c99-a637-4ce6-9b82-e02cbb85cb96
    - ▪ The site does show ending support for Office '16 on Mac.

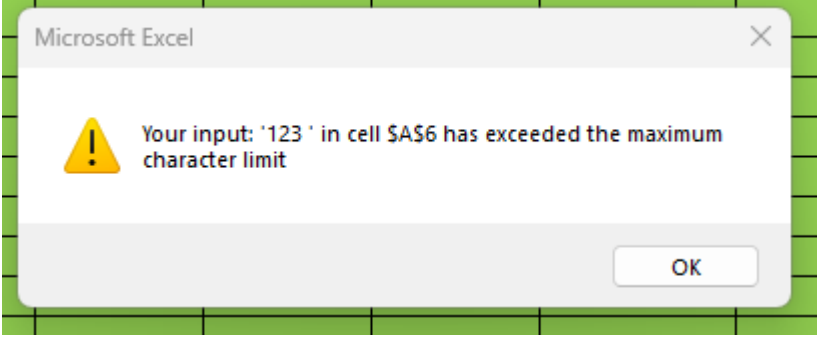## INPUTS (DETAIL OR LAYOUT TAB) – DATA INPUTS INTO THE TEMPLATES

Description: The below rules apply to both the SPI Template and the Batch Registration Templates. The templates have three tabs each:

- Tab 1: Template where Data will be input.
- Tab 2: Export Button.
- Tab 3: Formatting Guide.

Hidden Columns:	• Columns are hidden to reduce the inputs to only required fields, or those identified as "helpful" for either system logic or any LEA/Provider outreach needs (_Example_: Email Address on the SPI for truncated screening). o Columns can be expanded/collapsed by using the +/-.

Character Limits (per cell):	• Each column in the detail input is coded to receive a warning if the number of characters input exceeds the field limit (see guide tabs on respective templates for field limits).
Cells Are Pre-Formatted to TEXT:	• Each column in the detail or layout template is pre-formatted as Text meaning the cells will accept data as typed. • If a user attempts to modify the format to any format other than "text', the document will automatically reset all cells to text with any subsequent cell entry. • Ensures all data remains as it is input, retaining items like leading zeros or preventing longer entries from converting to a custom format. • If you enter data outside of the formatting guidelines outlined in the SPI GUIDE LAYOUT Tab, you will get a dialogue box followed by an auto undo – shown below: Microsoft Excel ⚠ Your input: '123 ' in cell A6 has exceeded the maximum character limit [OK]

Copy/Paste	• If you are going to copy/paste your data – Paste the data as "values" for data like emails that may be in the form of a hyperlink. This would be utilizing your right click menu.
	  o Right Click, go to paste and select the "values" icon.
	    ▪ If there is no "values icon", in the same right click menu, you can select "paste special" and select "text".
	  o Dates still need to be entered as MM/DD/YYYY - the columns are pre-formatted as text so that they will accept exactly as typed.

EXPORT TAB

Description: The function of the "Export" tab/button is to convert the data entered to the format required for submission. This only applies to the file format. The inputs will be subject to rejection if they do not align to the rules of the companion guides.

| Export Button on the Export Tab | • The user will click the "export" button on the Export tab. This will prompt the user to pick the location to "save as" the pre-formatted text file on their device.
  o SPI/Provider Roster = Pipe Delimited
  o Batch Registration = Fixed Width
The Below ONLY applies to the SPI template, not the Batch Registration Template: |

SPI/Batch Registration Supplemental Guide | v1.0

	- Once the export button is clicked, it will autofill the file name with the appropriate naming convention to include the current date. - Each LEA will need to replace the (Insert_LEA_Code) with your 4-digit LEA Code, please replace everything between and including the parentheses. **Example:** Preformatted File Name: ==(Insert_LEA_Code)== toCarelon_Provider_20240729.txt LEA Renamed File Name: ==ABCD==toCarelon_Provider_20240729.txt

REMINDERS

1. This enhancement will eliminate the need to convert the files moving forward. This document will pre-format the file(s) into a - pipe-delimited or a fixed width - text file.

2. The "**UNDO**" icon (Ctrl + Z on Windows) in Excel will not be a highlighted option and will be greyed out, on both templates. Data will need to be deleted if an error is made.

3. SPI = Standard Provider Index (aka. Provider/Practitioner Roster)
4. Batch Registration = Member/Student Data

5. The "SPI_Guide_Layout" Tab & the "Batch_Reg_Guide" Tab provide all the details needed to complete the document. This includes formatting rules and applicable values to use.
   a. Please ensure you review these tabs for each field dependency. This includes:
      i. Number of characters allowed per cell (length).
      ii. Notes and what acceptable entries are.
      iii. Formatting Requirements.
      iv. Field Descriptions.

6. Files are exchanged through one of the following:
   a. SFTP (most common) – see Additional Resources Below for links to these documents.
   b. ProviderConnect – see Additional Resources Below for links to these documents.

7. You will have your excel version of the template saved that can be your running template for modification and re-submission as changes are made to your provider roster.
   a. The "exported" copy that saves as a "pipe delimited text file" will be the version you send to Carelon.

ADDITIONAL RESOURCES

SPI/Provider Roster
** Link to the SPI Guide – Coming Soon!
** Link to the Provider Roster Quick Guide Template – Coming Soon!
**Link to the Provider Roster Common Errors/Reminders Document – Coming Soon!
**Link to the: • SFTP File Submission Instructions – Coming Soon! • ProviderConnect File Submission Instructions – Coming Soon!
Batch Registration
**Link to the Batch Registration Guide – Coming Soon!
**Link to the: • SFTP File Submission Instructions – Coming Soon! • ProviderConnect File Submission Instructions – Coming Soon!

FOR QUESTIONS, OR ADDITIONAL SUPPORT, PLEASE EMAIL CARELON AT **CYBHITPA@CARELON.COM**.

Revision History			
Version	**Date**	**Submitted By**	**Revision Description**
1.0	8/6/2024	Nicole Copiskey	Original Version
1.1	8/21/2024	Nicole Copiskey	Finalized After Review/Formatting Updates