COBRA & Direct Billing
NPM Import Specification

Revision 1012

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**Introduction**

The New Plan Member (NPM) Import system was designed to allow for the easy importation of NPM information into the COBRA & Direct Billing system. The system utilizes a Comma Separated Values (CSV) import text file to input information about a NPM. This document is designed to explain the format and function of this import file.

**Scope**

This document will explain the format and function of the import file used to import NPMs into the system. It is not written to fully explain the NPM fields or define imports other than the NPM import. This document defines import version 1.0.

**Revision History**

1001 – Initial release of this document

1002 – Revised the HIPAADATA section for MEDICAL plans

1003 – Added SendGRNotice field to NPM

1004 – Added a backslash (\) escape character for double quotes (“) (see Data Types for details).

1005 – Removed required for LastDayOfCoverage on HIPAADATA record

1006 – Changed length on IndividualIdentifier

1007 – Update Hire Date data requirements

1008 – Revised document branding and formatting.

1009 – Revised document branding.

1010 – Added “Male, Female” to the description field of values that can be used [sex field]

1011 – Updated Sex field with newly added Undisclosed sex value.

1012 – Added [NPMLOOKUP], [MEMBERUSERDEFINEDFIELD] line identifiers.

**Definition of Terms**

This document uses various terms that may have different meanings to different audiences. This section will help to explain these terms in the context of this document.

**New Plan Member**

A New Plan Member (NPM) is a current employee that is not yet receiving COBRA benefits.

**CSV – Comma Separated Values file**

A CSV file is a text file that contains values on each row that are separated by commas.

**Note:**  You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the system.

**Import Version**

Each import file should include a [VERSION] section that identifies the import version format the import file is adhering to.

If a [VERSION] record does not exist in the import file, it is assumed the import file is adhering to Version 1.

As new capabilities or changes are made to the import file format, this document and the equivalent version number will be updated.

**Line Identifier**

Each text line that is imported must have a line identifier as its first field, see Import File Layout for more information. This line identifier defines which fields come next on the text line.

**Import File Process**

A CSV import file should be created that matches the specifications defined in this document.

**Note:**  You should not use Excel to edit or save these files as Excel will alter the format of large numeric columns (such as SSN) and make them unreadable to the system.

The import file may be built with a simple text editor (such as Notepad) or generated from an export program written for an existing database.

To begin the import process:

* Navigate to **Utilities > Administrator Utilities > Import** from the COBRA & Direct Billing Main Menu Bar within the TPA, Employer, or Employer Division Portal.
* A page will be displayed allowing you to select a file. Browse to and locate your CSV import file on any of your local or network drives.
* Click the **Import File** button.
* The Import process will start by uploading your CSV file to the system. After the upload is complete, the system will begin scanning and importing the data contained in the import file.
* After the file has been imported, a report will be displayed indicating the success or failure of the import file data. If an error occurs, it will be indicated using its line number along with a description of the error. The Import Totals section describes the total number of lines processed and the total number of errors encountered. The report may look similar to the following:



**Import File Layout**

The NPM Import file is a CSV file where each line has values separated by commas. To allow for the importation of different types of information, the first field of each line defines what type of information will follow for the fields of that line. For instance, to begin the importation of a NPM record you will need a NPM line that starts with a line identifier of “[NPM]” and may appear similar to the following:

[NPM],111223333,223,MyClientName,MyClientDivisionName,Bob,L,Jones,MR,bjones@test.com,,...(etc).

This NPM will also need a line that defines the HIPAA information for the NPM. This is accomplished with a line that begins with a line identifier of “[NPMHIPAADATA]” and the file may appear similar to the following:

[NPM],111223333,223,MyClientName,MyClientDivisionName,Bob,L,Jones,MR,bjones@test.com,,...(etc).

[NPMHIPAADATA],EE,5/1/2008,5/1/2010,Medical1

All of the lines following the “[NPM]” line are related to that NPM. When a new “[NPM]” line is encountered, the previous NPM is validated and saved into the database and then the import process begins for the new NPM.

Line identifiers and their definitions are as follows:

|  |  |  |
| --- | --- | --- |
| Line Identifier | Required to Complete a NPM | Description |
| [NPM] | x | The main NPM record |
| [NPMHIPAADATA] |  | The NPM’s HIPAA Information |
| [NPMDEPENDENT] |   | The NPM’s Dependent Information |
| [NPMLOOKUP] |  | The line is used to find the required NPM record. |
| [MEMBERUSERDEFINEDFIELD] |  | The line is used to enter User Defined Field Values for NPM.  |

**Import Version Label**

Each import file should include a [VERSION] section that identifies what import version format the import file is adhering to. If no [VERSION] record exists in the import file, it is assumed that the import file is adhering to Version 1.1. As new capabilities or changes are made to the import file format this document and the equivalent version number will be updated.

This revision of this document defines version 1 of the NPM Import.

**Import Line Identifiers (Section Definitions)**

The line identifiers explained in the Import Version Label section each expect various fields to follow them on their respective line. The tables below define these fields for each of the line identifiers.

Required fields need to have a value after the comma that corresponds to the data type specified. Non-required fields may be left blank (nothing appearing between the commas).

**[VERSION]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| VersionNumber | Integer | x | Use “1” for this import specification |

 **[NPM]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Description |
| SSN | SSN | x |  |
| IndividualIdentifier | Text - 50 |  |  |
| ClientName | Text - 100 | x |  |
| ClientDivisionName | Text - 50 | x |  |
| FirstName | Text - 50 | x |  |
| MiddleInitial | Text - 1 |  |  |
| LastName | Text - 50 | x |  |
| Salutation | Text - 35 |  | MR, MRS, MS, MISS, DR |
| Email | Email |  |  |
| Phone | Phone |  |  |
| Phone2 | Phone |  |  |
| Address1 | Text - 50 | x |  |
| Address2 | Text - 50 |  |  |
| City | Text - 50 | x |  |
| StateOrProvince | Text - 50 | x |  |
| PostalCode | Text - 35 | x |  |
| Country | Text - 50 |  |  |
| Sex | Sex | x | F, M, U, Male, Female, Undisclosed |
| UsesFamilyInAddress | Boolean |  | Optional: Adds “and Family” to Address Labels; Defaults to FALSE |
| HasWaivedAllCoverage | Boolean |  | Optional: Defaults to FALSE |
| SendGRNotice | Boolean |  | Optional: Defaults to TRUE. If omitted, the field defaults to TRUE which has always been the behavior. Set to FALSE if you wish for this NPM to NOT send the General Rights notice. |
| HireDate | Date | Situational | Required if NPM with same SSN exists. Null is valid. |

**[NPMHIPAADATA]**

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Accepted Values |
| CoverageLevelTypeName | Text - 35 | x | EE, EE+SPOUSE, EE+CHILD, EE+CHILDREN, EE+FAMILY, EE+1, EE+2, SPOUSEONLY, SPOUSE+CHILD, CHILDREN, EE+1Child, EE+2Children, EE+3Children, EE+4Children, EE+5orMoreChildren, EE+Spouse+1Child, EE+Spouse+2Children, EE+Spouse+3Children, EE+Spouse+4Children, EE+Spouse+5orMoreChildren, SPOUSE+1CHILD, SPOUSE+2CHILDREN, SPOUSE+3CHILDREN, SPOUSE+4CHILDREN, SPOUSE+5ORMORECHILDREN, EE1UNDER19, EE+SPOUSE1UNDER19, EE+SPOUSE2UNDER19, EE+CHILDREN1UNDER19, EE+CHILDREN2UNDER19, EE+CHILDREN3UNDER19, EE+FAMILY1UNDER19, EE+FAMILY2UNDER19, EE+FAMILY3UNDER19 |
| OriginalEnrollmentDate | Date | x |  |
| LastDayOfCoverage | Date |  |  |
| PlanName | Text-50 | x | Name of MEDICAL plan |

**[NPMDEPENDENT]**

Optional

|  |  |  |  |
| --- | --- | --- | --- |
| Column Name | Data Type | Required | Description |
| FullName | Text - 100 | x |  |
| RelationshipName | Text - 35 | x | SPOUSE, CHILD, DOMESTICPARTER |
| OriginalEnrollmentDate | Date | x |  |
| LastDayOfCoverage | Date | x |  |

**[NPMLOOKUP]**

If applicable

|  |  |  |  |
| --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** |
| ClientName | Text - 100 | x | N/A |
| SSN | SSN | x | N/A |
| HireDate | Date | Situational | Required if NPM exists with the same SSN. Null is valid. |

**[MEMBERUSERDEFINEDFIELD]**

If applicable

The [MEMBERUSERDEFINEDFIELD] record type is used to enter User Defined Field Values for Members.

[MEMBERUSERDEFINEDFIELD] must only be used with a corresponding [NPM] for new NPM or [NPMLOOKUP] for existing NPM.

|  |  |  |  |
| --- | --- | --- | --- |
| **Column Name** | **Data Type** | **Required** | **Accepted Values** |
| UserDefinedFieldName | Text - 35 | x | The unique name of the user defined field. |
| UserDefinedFieldValue | Text - 2000 |  | Any provided value, including blank, will be saved. |
| Text - 200 |  | Any provided value, including blank, will be saved. |
| Boolean |  | True = "1", "Y", "YES", "T" or "TRUE"; False="0", "N", "NO", "F" or "FALSE" or blank. |

**Data Types**

The data types used in the various import sections are defined below.

**Note:**  The fields in the import file are all text fields (since the file is CSV format). The following definitions explain the formatting of the text in the corresponding field.

|  |  |
| --- | --- |
| Data Type | Definition |
| Text | Can be any text value up to the number of characters specified. If the text contains a comma, then the entire field should be enclosed in double quotes (“). If you need a double quote to be represented in the text then the double quote (“) must be escaped with a back slash (\”). To get the text - My “Cool” Company – you would represent it like this – My \”Cool\” Company - this escape character works inside other double quotes as well, for example “My “other” Company” would be represented by “My \”other\” Company”. |
| Integer | Can be any number from 0 to 32,767. No punctuation. |
| Date | Entered as MM/DD/YYYY, where MM is the month, DD is the day and YYY is the year. You can use a single digit or two digit leading zero for the month and day. The year should always be entered as 4 digits. |
| DateTime | Entered as MM/DD/YYYY HH:mm AM, where MM is the month, DD is the day and YYYY is the year, HH is the hour, mm is the minute and AM is either AM or PM. You can use a single digit or two digit leading zero for the month, day, hour and minute. The year should always be entered as 4 digits. |
| Boolean | True = "1", "Y", "YES", "T" or "TRUE", False="0", "N", "NO", "F" or "FALSE". |
| Money | Format as number with one period, no commas and always have at least one digit to the left of the period and 2 digits to the right of the period. IE: 12 cents would be entered 0.12 |
| SSN | Format as 9 digits, can also include the dashes. Leading zeros are required if the SSN begins with zeros. |
| Sex | Single character where F = Female, M = Male, U = Undisclosed. |
| Phone | Format as 10 digits. |
| Email | Text – 100, with at least one “@” and at least one “.” after the @. |

**Sample Import File**

The following text is the contents of a sample file that demonstrates the import of a NPM.

[VERSION],1.0

[NPM],552552222,1,TestClient1,TestClient1Division,Bob,Z,Jones,MR,bjones@test.com,4024445555,,1234 Some street,,Omaha,NE,68123,,M,T,F,F

[NPMHIPAADATA],EE,5/1/2008,5/1/2010,Med1

[NPMDEPENDENT],Sally Jones,SPOUSE,5/1/2008,5/1/2010

[NPMDEPENDENT],Wally J Jones,CHILD,7/1/2008,5/1/2010

[NPM],552553333,1,TestClient1, TestClient1Division,Walter, ,Smith,MR,wsmith@test.com,4024445552,,12343 Some street,,Omaha,NE,68123,,M,T,F

[NPMHIPAADATA],EE,5/1/2008,5/1/2010,Med1

[NPMDEPENDENT],Wilma Smith,SPOUSE,5/1/2008,5/1/2010

[NPMDEPENDENT],Waldo Smith,CHILD,7/1/2008,5/1/2010

[NPM],333442222,2,TestClient1, TestClient1Division,Jorge,R,Rejo,MR.,test3@test.com,4444445555,,123 apt b str,,omaha,ne,68111,,F,T,F,T