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DXC Assure Claims

Meet consumer expectations and optimize processes with a flexible, scalable, and configurable claims management system.

API Based Data Exchange Tools

Release version 24.3
October 2024

All questions regarding this documentation should be routed through customer assistance, Blythewood, SC

Phone: 877-275-3676
Email: risksupp@dxc.com

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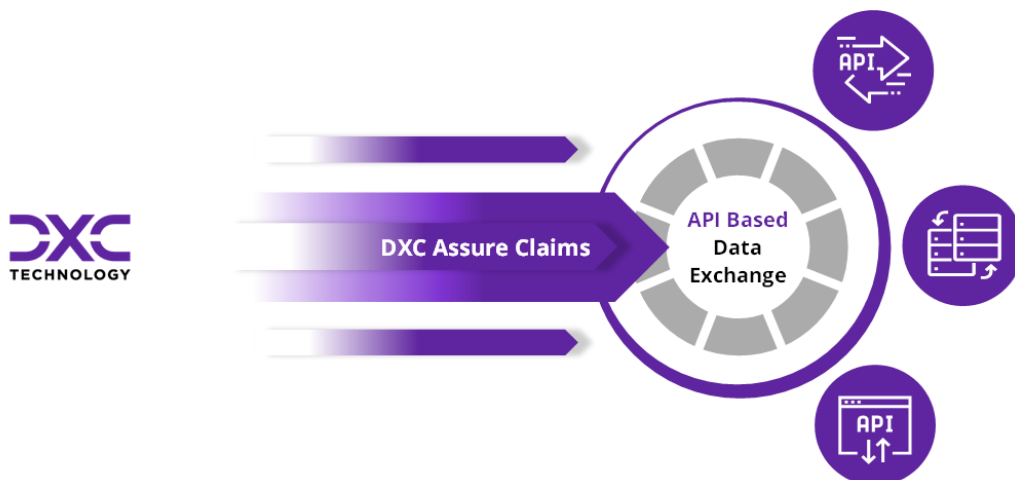# Introduction to API based Data Exchange Tools and Prerequisite Settings

DXC Assure Claims | Release: v.24.3 | October 2024

Introduction to API Based Data Exchange Tools

DXC is strategically working towards creating an API based Import/Extract Tool which would negate dependencies on SAP interfaces requiring additional licensing.

The table below shows the release calendar for the new API based Data Exchange tools:

Name of Module	Assure Claims version GA
HR Interface	24.3
PUS	23.4
MMSEA	23.3
MBR	22.3
PositivePay	22.3
1099	23.1

Note

➢ SAP configuration will no longer be required to run the new API based Import/Extract tasks.
➢ The new API based Data Exchange solutions will only be accessible via the Configuration Manager zone.
➢ The respective DA SAP based modules (in the Utilities zone) will not be supported simultaneously with the new API based solution (in the Configuration Manager zone). Thus, with the release of DXC Assure Claims v. 23.1, MBR, PositivePay and 1099 tasks will no longer be available through the old task manager in the Utilities zone.
➢ It is imperative that all the prerequisite settings are performed to get the new API based Data Exchange modules functional.

Prerequisite Settings

The following one-time settings need to be done in the Configuration Manager/Utilities zones to perform Data Import/Extract operations. **It is imperative that these settings be performed in the exact order mentioned below.**

1. **Select the checkbox labeled Use Rule Engine under General System Parameters.**

Note

➢ A License Key will need to be entered to enable the checkbox labeled **Use Rule Engine**. Please contact Assure Claims Support Helpdesk for assistance.
➢ There are no additional costs associated with generating a License Key for enabling the Rule Engine feature

If you're using the Configuration Manager, navigate to **Use Rule Engine** checkbox as shown in **[Fig. 1]**
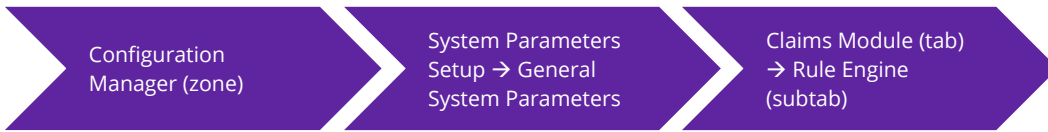
DXC Assure Claims (Configuration Manager) screen
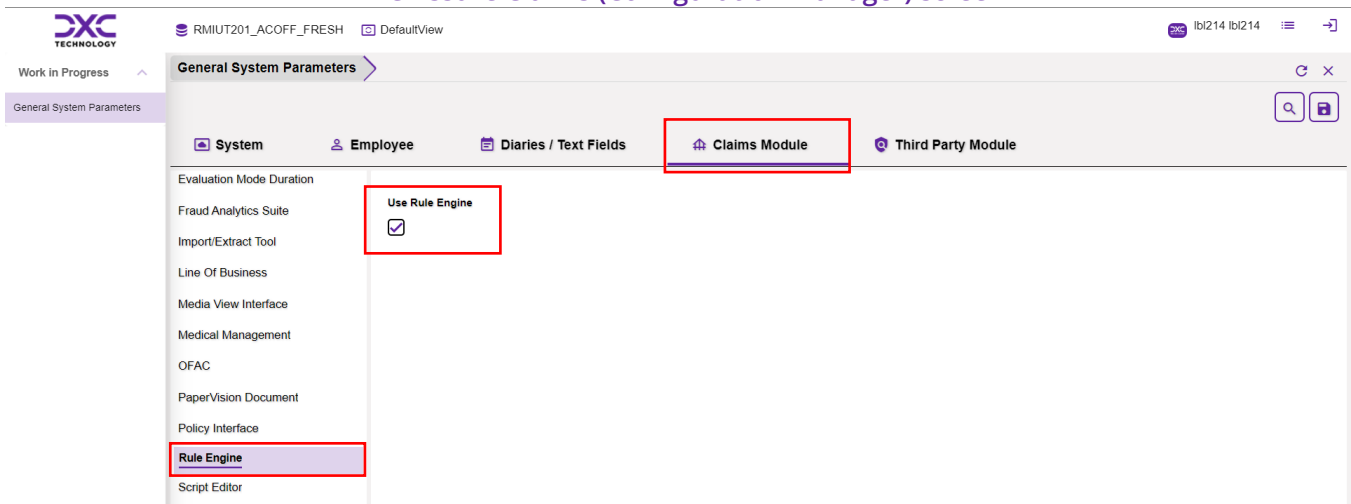
[Fig. 1]

If you're using the Old Utilities, navigate to **Use Rule Engine** checkbox as shown in **[Fig. 2]**
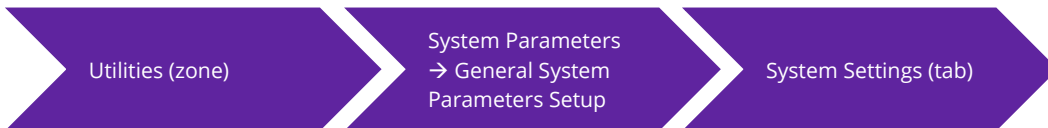
DXC Assure Claims (legacy Utilities) screen
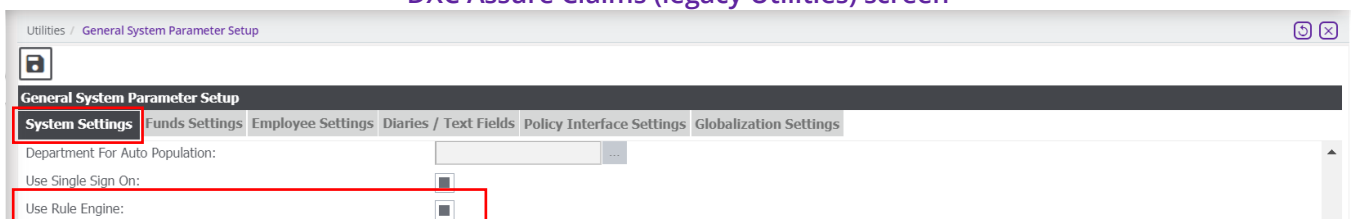
[Fig. 2]

2. **Mandatory requirement of a Database Server (either PostgreSQL or MongoDB) for all API based Import tools**

   A **Database Server** (either **PostgreSQL** or **MongoDB**) must be installed to act as a **Staging** area for all **Data Import Tools**.

> **Note**
> ➢ DXC recommends the use of PostgreSQL as it is completely free to use
> ➢ MongoDB (enterprise) may also be used, but it must be noted that it is a licensed software for which additional costs will need to be paid
> ➢ The PostgreSQL software may be downloaded on the Application Server itself or any other server on the same network. However, it must be ensured that direct connectivity to the Application Server is always maintained. A cloud-based service may also be used for the same
>   • https://www.enterprisedb.com/downloads/postgres-postgresql-downloads
> ➢ Customers hosted with DXC may please contact the Assure Claims Support Helpdesk to get PostgreSQL installed
> ➢ Any version of PostgreSQL (13.9 or higher) may be installed for your Operating System
> ➢ Please keep the connection information handy before proceeding with the next steps

An example of a Staging Connectionstring

> **ID=**<UserID>**;Password=**<password>**;Server=localhost;Port=5432;Integrated Security=true;Pooling=true;**

> **Note**
> ➢ Enter the 'UserID' and 'password' used during PostgreSQL setup
> ➢ If PostgreSQL is installed on the Application Server, then Server should be left as "**localhost**". Else, enter the server's name where PostgreSQL has been installed
> ➢ The default PostgreSQL Port is **5432**, however if a different port is used, please enter it accordingly

3. **Select the checkboxes – Use Import Tool and Use Extract Tool in the Configuration Manager Zone**

Navigate to the Import/Extract Tool subtab:

Configuration Manager (zone)	System Parameters Setup → General System Parameters	Claims Module (tab) →Import/Extract Tool (subtab)
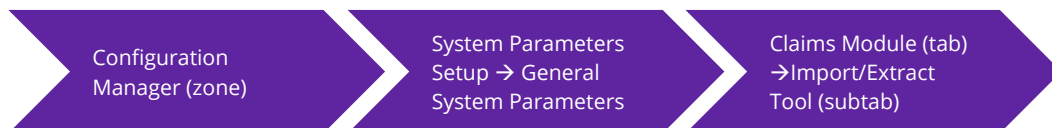
And select the checkboxes labeled **Use Import Tool** and **Use Extract Tool**. **[Fig. 3]**

DXC Assure Claims (Configuration Manager) screen

[Fig. 3]
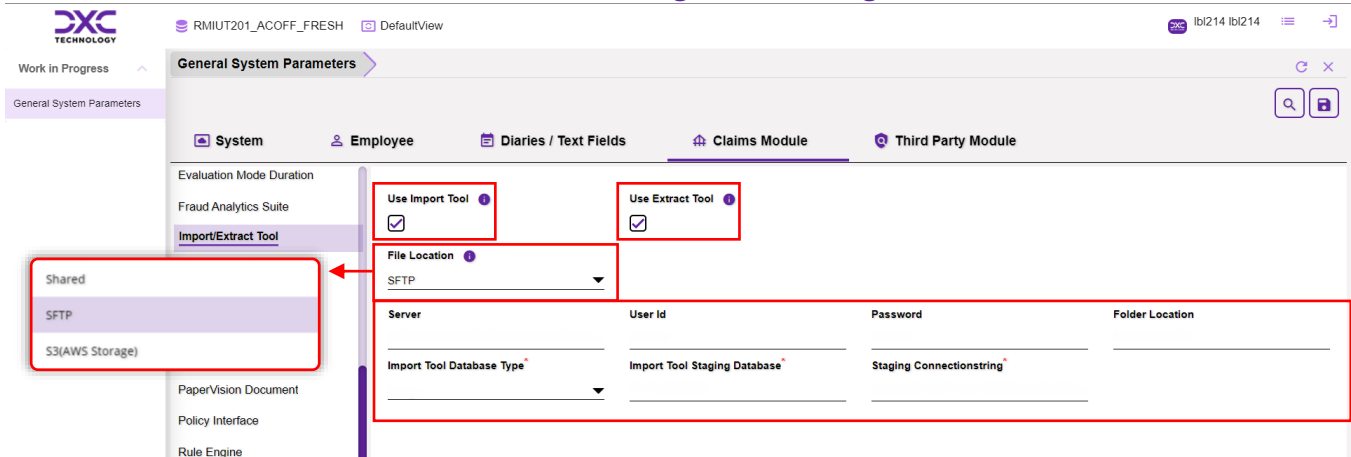
The **File Location** dropdown field has 3 options:

- ➢ **Shared**
- ➢ **SFTP**
- ➢ **S3 (AWS Storage)**

When the selected **File Location** is **SFTP**, then the following fields will be displayed:

- ➢ Server
- ➢ User ID
- ➢ Password
- ➢ Folder Location

- ➢ Import Tool Database Type*
- ➢ Import Tool Staging Database*
- ➢ Staging Connectionstring*

When the selected **File Location** is **S3(AWS Storage),** then the following fields will be displayed:

- ➢ File Path*
- ➢ S3 Bucket Name*
- ➢ S3 Access Key
- ➢ S3 Secret Key

- ➢ S3 Region*
- ➢ Import Tool Database Type*
- ➢ Import Tool Staging Database*
- ➢ Staging Connectionstring*

When the selected **File Location** is **Shared**, then the following fields are displayed:

- ➢ Shared Location
- ➢ Import Tool Database Type*
- ➢ Import Tool Staging Database*
- ➢ Staging Connectionstring*

File Location

➢ This location will be used to place the Import Files as well as get the Extracts from DXC Assure Claims

➢ A network shared path such a SFTP or S3 may be chosen by entering the necessary details
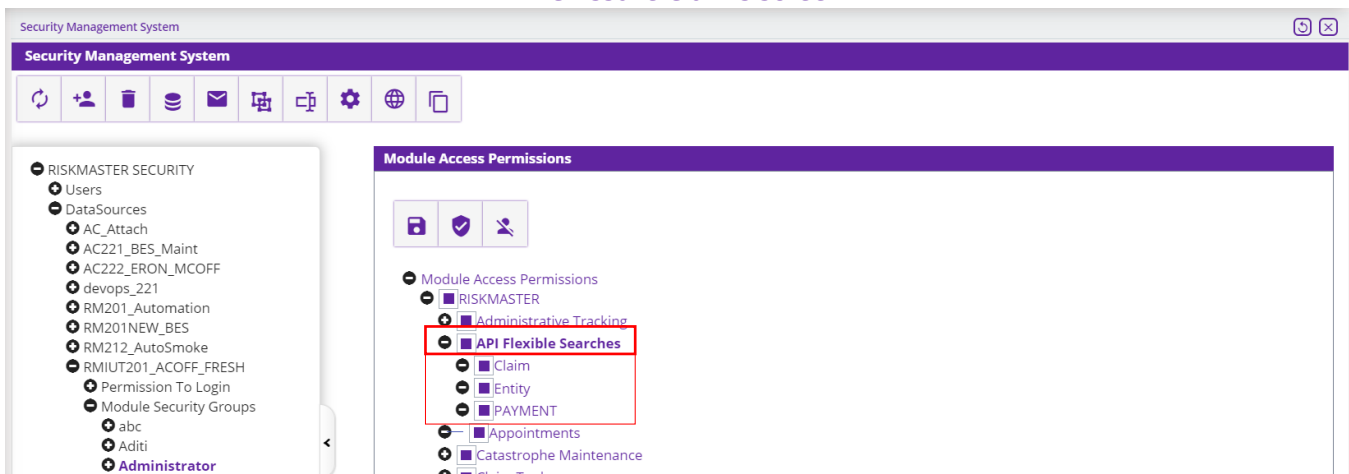
Import Tool Database connection details

➢ Appropriate details for connecting to the Staging Database Server will need to be entered

➢ If you are using PostgreSQL as staging database server, ensure that the database which you entered in the field labeled "**Import Tool Staging Database**" **[Fig.3]** has already been created on your PostgreSQL Database server before you import the Import Tool package.

➢ Make sure that the Staging Connectionstring is accurate before proceeding to next steps

4. Select the checkbox labeled – API Flexible Searches, in the Security zone

For API based Export Tool, navigate to the **Security Management System** screen and turn ON the "**API Flexible Searches**" for the **user** who would schedule **the Task Manager Jobs**. **[Fig. 4]**

| Security → Security Management System | DataSources → Module Security Groups → User | Module Access Permissions → RISKMASTER → | API Flexible Searches (checkbox/node) |

DXC Assure Claims screen

[Fig. 4]

5. **Download Microsoft OLE DB driver**

    To run the Import tool for MDB file to support modules such as MBR, Microsoft OLE DB Driver must be installed in the Application Server.

    Download the Microsoft OLE DB driver below:

    DOWNLOAD MICROSOFT OLE
    DB DRIVER

6. **Download the ImportTool and ExtractTool PACKAGE Files and import them into the DXC Assure Claims system**

    Note

    ➢ The package files for CHPs may be different from the GA release versions

    IMPORTTOOL.PKG   EXTRACTTOOL.PKG

    Downloadable "PACKAGES" were first introduced in release version 18.3. To know more about PACKAGE download and their import into DXC Assure Claims (formerly RISKMASTER Accelerator/DXC Insurance RISKMASTER™), please click on the adjoining Release Notes document and refer to pages 15 and 22 for details.

    READ THE RELEASE NOTES FOR
    VERSION 18.3

    Important Note

    ➢ Please contact your DXC Assure Claims administrator to get the relevant package files

Introduction of an ability to create and run Custom Import / Extract Jobs

With the release of v. 23.1, DXC Assure Claims has made further progress towards the objective of delivering **API based Extract and Import Tools by negating any dependencies on SAP interfaces**.
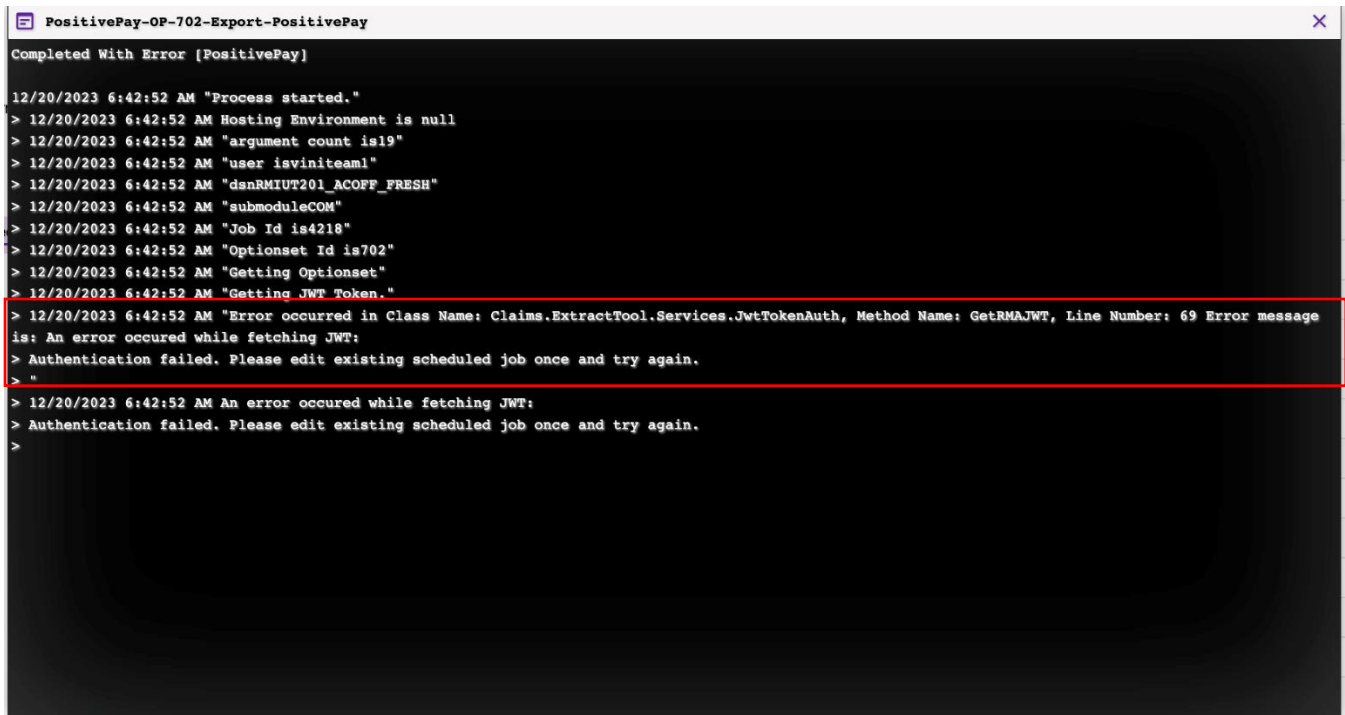
To this end, the ability to create and run **Custom Import/Extract** jobs via the new **API-based solution** has been introduced. The implementation caters to the Custom Data Exchange Requirements of both Import and Extract jobs.

> ### Note
>
> ➢ The existing/scheduled Import jobs in the **Claim Scheduler** module will stop working once the client environment are upgraded/migrated to the latest version. DXC strongly recommends rescheduling the existing Import jobs after migration/upgrade to 23.1.
>
> ➢ Customers desirous of using the Custom Import/Extract jobs feature should reach out to their Sales Contact/Project Manager or DXC Assure helpdesk. Our Implementation services team would then analyze your business requirements and help you implement the same.
>
> ➢ All the Custom Data Exchange jobs will now run directly from the Claim Scheduler without any dependency on SAP. It even negates the need for server access (via Citrix or otherwise).

```
PositivePay-OP-703-Import-PositivePay                                                    ✕
Completed With Error [PositivePay]

12/20/2023 7:00:55 AM 2---12/20/2023 7:00:55 AM---Parsing arguments.
> 12/20/2023 7:00:55 AM Hosting Environment is null
> 12/20/2023 7:00:55 AM 2---12/20/2023 7:00:55 AM---Process started.
> 12/20/2023 7:00:55 AM 2---12/20/2023 7:00:55 AM---Read Configuration.
> 12/20/2023 7:00:55 AM 2---12/20/2023 7:00:55 AM---Get Optionset.
> 12/20/2023 7:00:55 AM 2---12/20/2023 7:00:55 AM---https://dev-assure-claims.dxc-rmcl.com/claimsapi/dataanalytics/optionset/
> 12/20/2023 7:00:55 AM 1---12/20/2023 7:00:55 AM---Job execution interrupted due to errors.An error occured while fetching JWT.Authentication failed.
Please edit existing scheduled job once and try again.
> 12/20/2023 7:00:55 AM 1---12/20/2023 7:00:55 AM---Job execution interrupted due to errors.One or more errors occurred. (An error occured while
fetching JWT.Authentication failed. Please edit existing scheduled job once and try again.)
> 12/20/2023 7:00:55 AM 1---12/20/2023 7:00:55 AM---Job execution interrupted due to errors.One or more errors occurred. (An error occured while
fetching JWT.Authentication failed. Please edit existing scheduled job once and try again.)
> 12/20/2023 7:00:55 AM 1---12/20/2023 7:00:55 AM---Job execution interrupted due to errors.One or more errors occurred. (An error occured while
fetching JWT.Authentication failed. Please edit existing scheduled job once and try again.) System.Exception: An error occured while fetching
JWT.Authentication failed. Please edit existing scheduled job once and try again.
> at ImportTools.Helpers.JwtTokenAuth.GetRMAJWT(Globals Globals) in D:\ClaimsSchedulerAPI\data-exchange-
libs\Claims.ImportTool\Helpers\JwtTokenAuth.cs:line 62
> at ImportTools.Helpers.CommonService.GetAsync(String surl, Globals Globals) in D:\ClaimsSchedulerAPI\data-exchange-
libs\Claims.ImportTool\Helpers\Common.cs:line 394
> at ImportTools.Helpers.CommonService.CallAPI(String url, String methodtype, Object inputobject, Globals Globals) in D:\ClaimsSchedulerAPI\data-
exchange-libs\Claims.ImportTool\Helpers\Common.cs:line 368
_
```

Procuring API based DE Tools

The procurement of API based DE Tools may involve additional cost/ consulting/ agreement/ licensing considerations.

Please reach out to DXC Assure Claims Support or your DXC Assure Claims Sales Representative for more information.
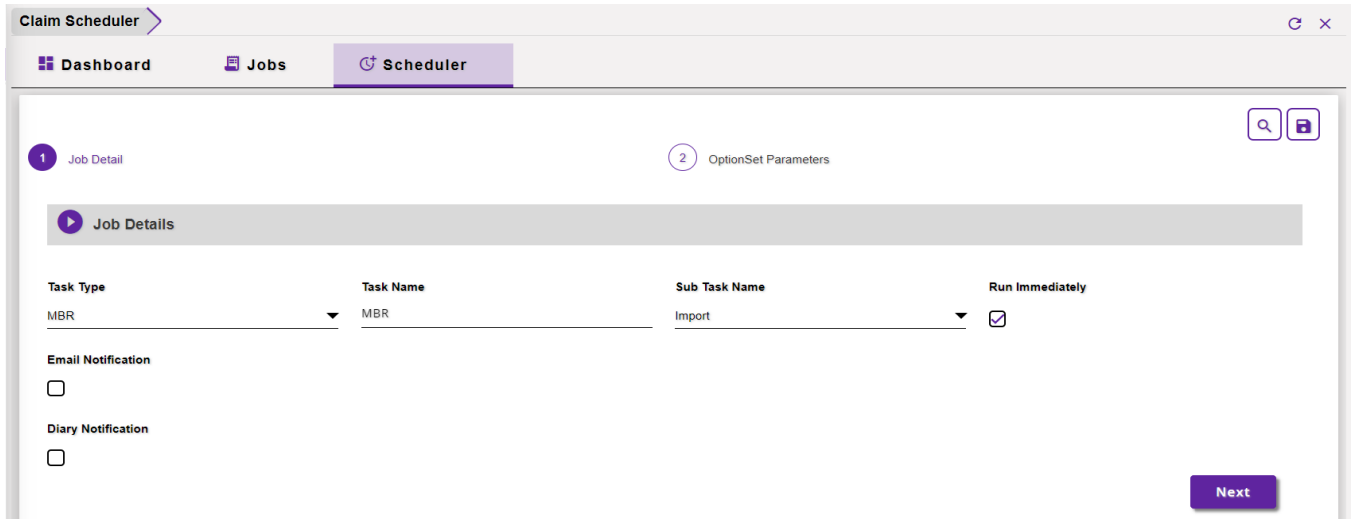
MBR Import

To schedule an MBR Import job, go to **Configuration Manager → Task Manager → Scheduler section → Job Details → and schedule a Task by selecting MBR as Task Type and Import Tool as Sub Task Type.** Enter required data in the **StartDate /End Date** and **Job Detail section**.
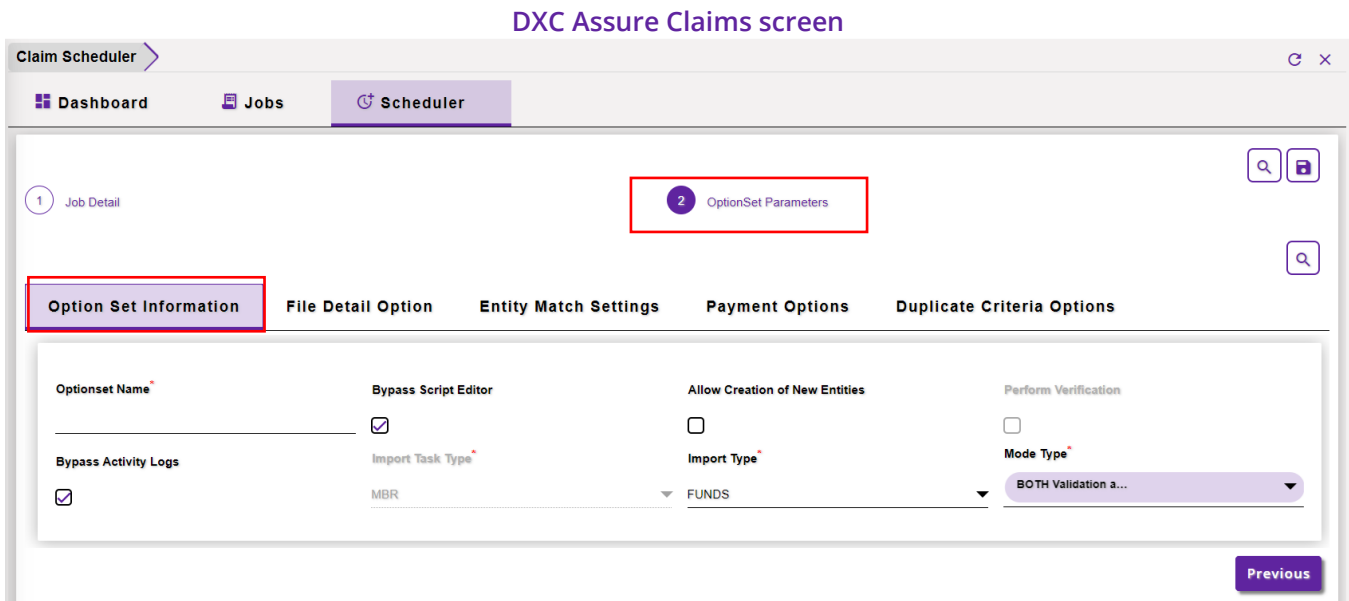
DXC Assure Claims screen

[Fig. 5]

Next, enter the frequency of job execution in **Job Scheduler** to get redirected to the OptionSet Parameters tab. **[Fig. 6]**

DXC Assure Claims screen

[Fig. 6]

The Optionset Parameters tab includes 4 sub-sections namely, OptionSet Information, File Detail Option, Entity Match Settings, Payment Options, Duplicate Criteria Options. Enter relevant data in the respective fields of each section.

DXC Assure Claims screen
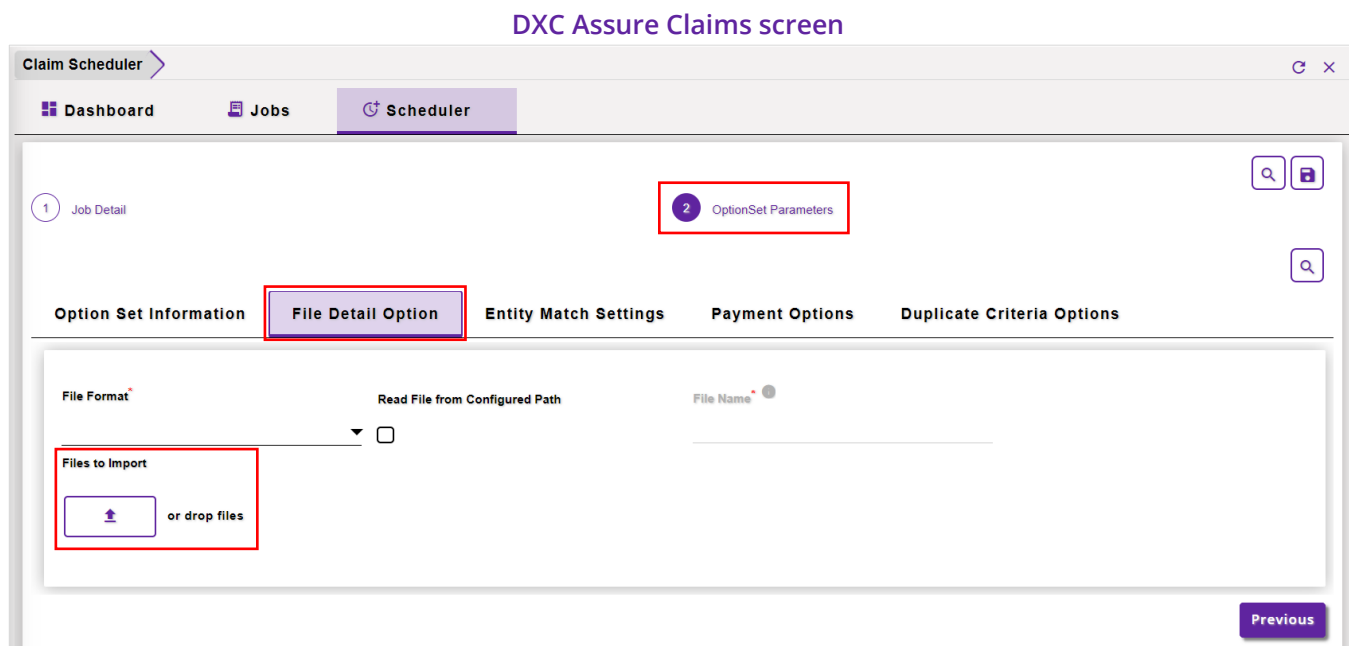
[Fig. 7]

The path for the **Import File** – **Shared**, **SFTP** or **S3(AWS Storage**, could be configured via the General System Parameters screen in the Configuration Manager zone. Alternatively, the **Import File** can be directly imported via the **File Detail Option** tab **[Fig. 7]** of the OptionSet Parameters section on the Claim Scheduler screen.

Once all requisite information has been entered into the fields of all the accordions the Save button can be selected to schedule the job.

For complete information on MBR Optionset Parameters, please refer to the **DA MBR Optionset User Guide document on the Claims Microsite** → DXC Assure Claims Release Info →Data Analytics → DE Modules Optionset User Guides → MBR

LOG INTO DXC CLAIMS MICROSITE

DXC Assure Claims screen

[Fig. 8]

To edit the scheduled job, select the clickable link to get redirected to the respective screen. To remove the same, select the corresponding checkbox, followed by the **Delete** button from the top right corner.

Note

➢ With the new API based MBR Import solution, the need to create a Reserve prior to importing a payment has been resolved. You can now Import Payments without Reserves as the system will automatically create the required Reserves in the background

MBR Export

To extract for an MBR (Medical Bill Review), go to **Configuration Manager → Task Manager → Scheduler section → Job Details**. Mentioned below are the various fields pertaining to it are mentioned below.

Schedule a Task with the **Task Type – MBR** and **Sub Task Name - Extract**. Secondly, enter required data in the StartDate /End Date and Job Scheduler section. Next, in the Medical Bill Review → Optionset Parameters tab, enter a unique name for the **Optionset** and select **Export Type**. **[Fig. 9]**

DXC Assure Claims screen
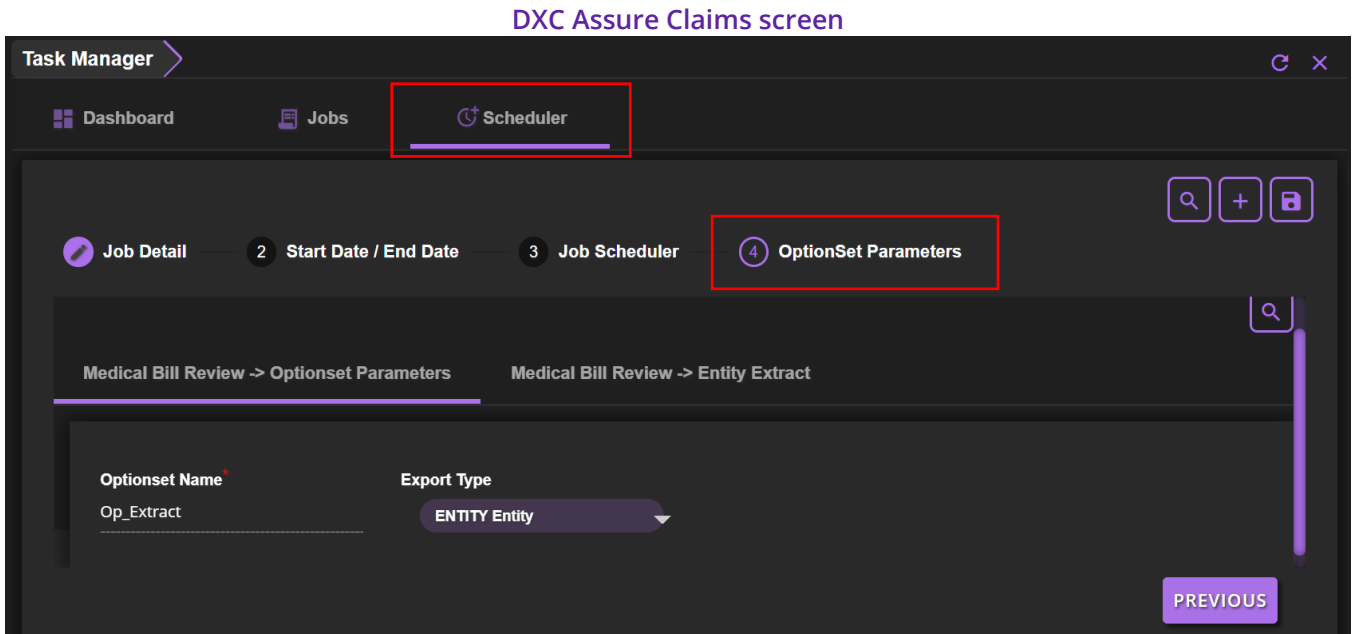
[Fig. 9]

There are two types of **Export Type** namely, Entity and Claim. Depending upon the selection made in this field, the Medical Bill Review → Entity Extract or Medical Bill Review → Claim Extract section will be correspondingly displayed. Enter relevant data in the respective sections and select the Save button. The created job will be displayed in the Task Manager → Jobs tab → Task List section. [Fig. 10]

DXC Assure Claims screen
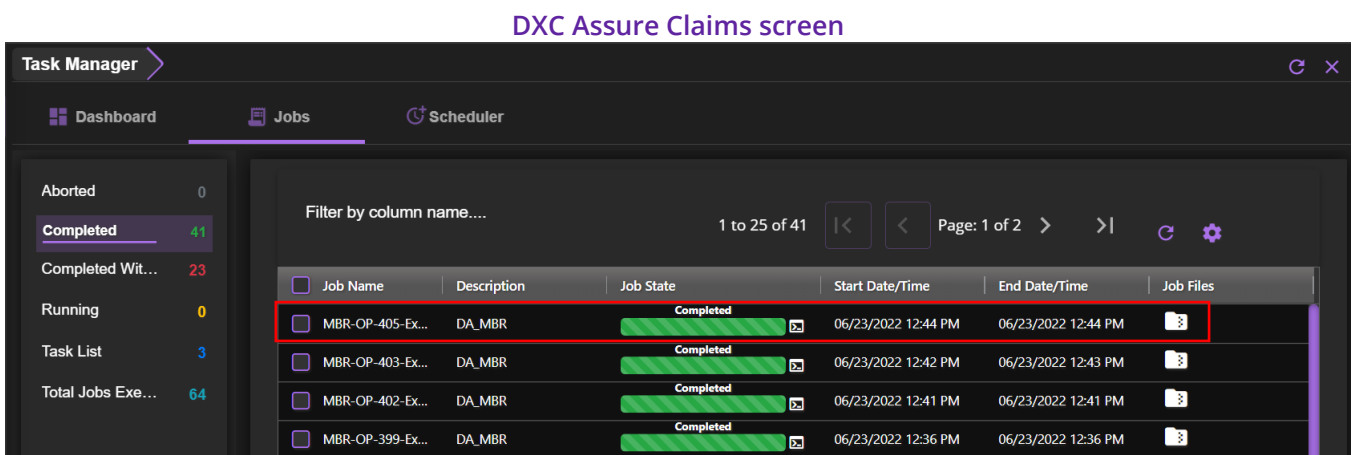

[Fig. 10]

To edit the scheduled task, select the clickable link to get redirected to the respective screen.

> **Note**
>
> ➢ While the Task Manager screen of the MBR Extract Tool has been completely redesigned and given a modern look and feel, its functionality has not been altered.
> ➢ The details of an existing MBR Extract job will be prefilled in the respective fields if the same task is created again.
> ➢ The data will be auto populated based on the selected Task Type and Sub Task Name.

PositivePay Import

Go to **Configuration Manager > Task Manager > Scheduler section.** This section features two tabs, namely, **Job Detail** and **OptionSet Parameters**. In the **Job Detail** tab, schedule a Task with the newly added **Task Type – PositivePay** and **Sub Task Type – Import**. Next, enter relevant data in the fields of the **OptionSet Parameters** tab and select **Save**.

DXC Assure Claims screen
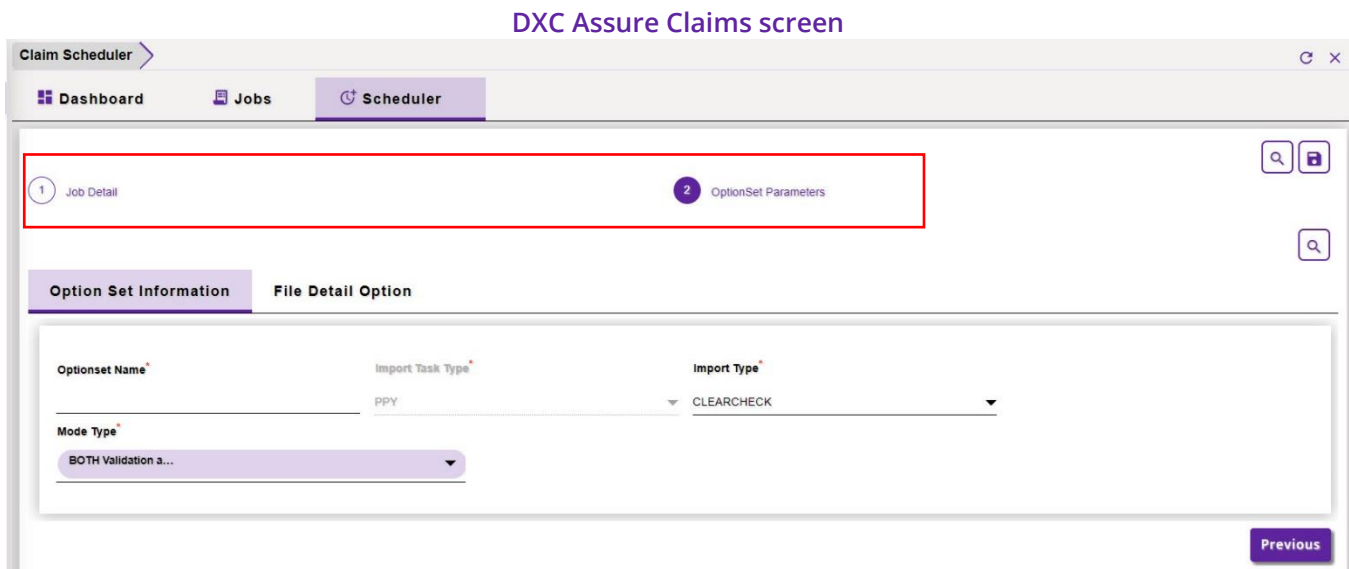
[Fig. 11]

It is important to note that earlier, the path for the **Import File**, whether **Shared**, **SFTP,** or **S3(AWS Storage)**, could only be configured via the **General System Parameters** screen in the **Configuration Manager** zone.

Thus, the extension of this additional option for **Import File** upload offers enhanced convenience by contributing to a smoother **PositivePay** Import job workflows.

DXC Assure Claims screen
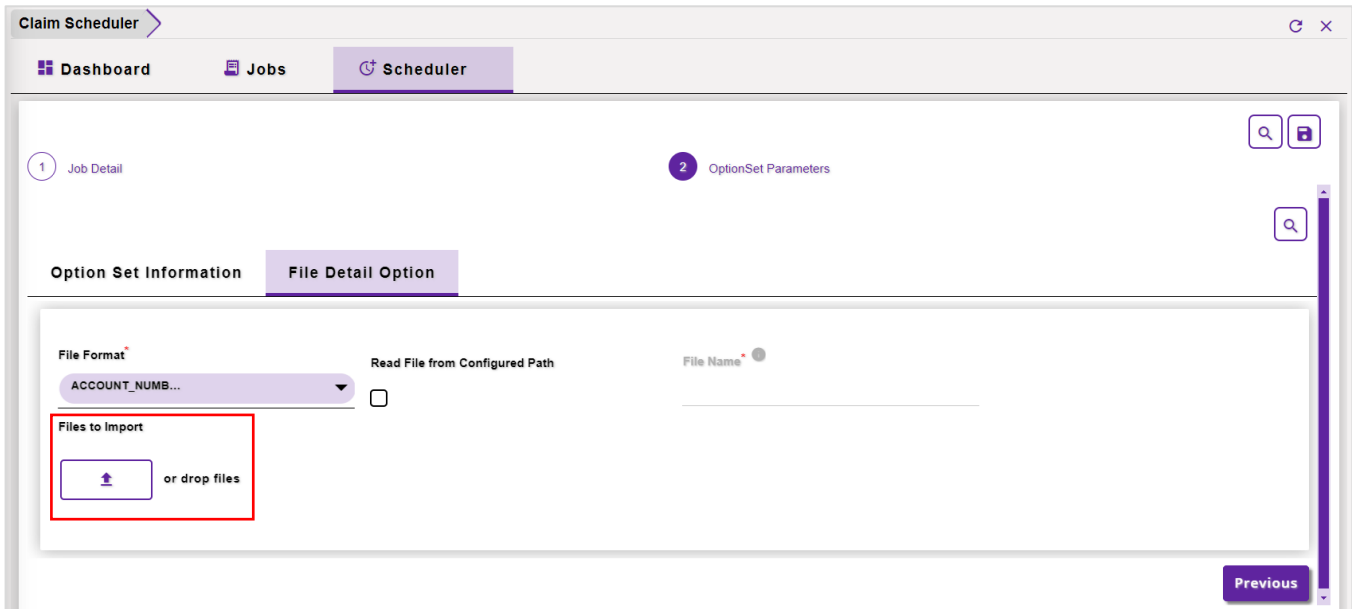
[Fig. 12]

Based on the selections made on this screen, the task will be scheduled, and the **PositivePay Import job** along with the job files will be displayed in the **Jobs** section of the **Task Manager** screen**. [Fig. 13]**

Note

➢ When the new onscreen file upload option is not used and instead the checkbox "**Read File From Configured Path**" is selected, the "**File Name**" field will become editable

➢ The file name format for API-based Import Tool jobs will be "filename.extension", whilst earlier, we were expecting file name without extension

➢ A validation message will be displayed if the file extension isn't mentioned in the format mentioned above

---

DXC Assure Claims screen
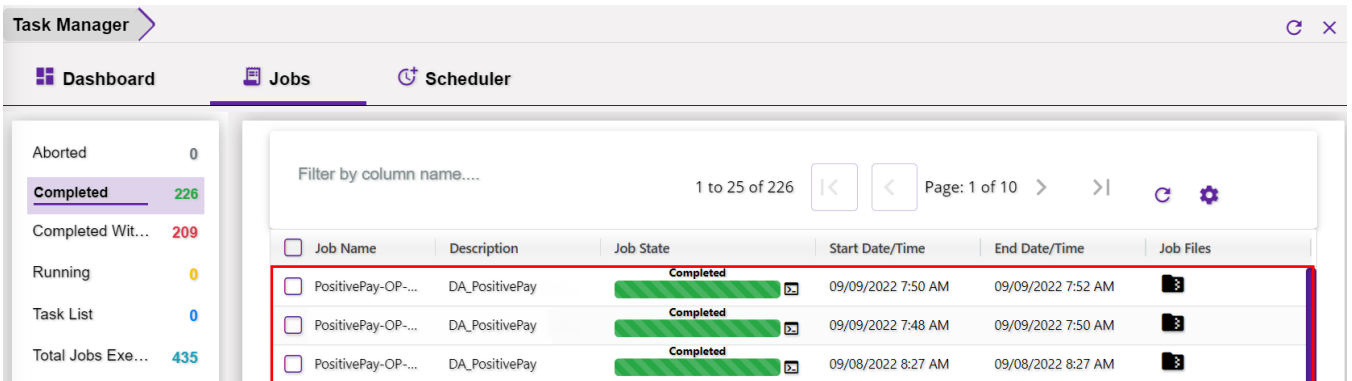
[Fig. 13]

PositivePay Extract

The Job for the PositivePay Extract tool can be scheduled and executed like any other job. For this, go to **Configuration Manager → Task Manager → Scheduler section.** This section features four tabs, namely,

| Job Detail | Start Date / End Date | Job Scheduler | OptionSet Parameter |

In the **Job Detail** tab, schedule a Task with the newly added **Task Type – PositivePay** and **Sub Task Type – Extract**. In the following tab, enter select the required **Start Date** and **End Date**. Next, enter the frequency of job execution in **Job Scheduler** to get redirected to the **OptionSet Parameters** tab.

DXC Assure Claims screen

[Fig. 14]

This tab includes the following fields:

- Optionset Name
- File Name
- Company Name/Title
- Manually Change Date Range
- Date From
- Date To

- Bank Format
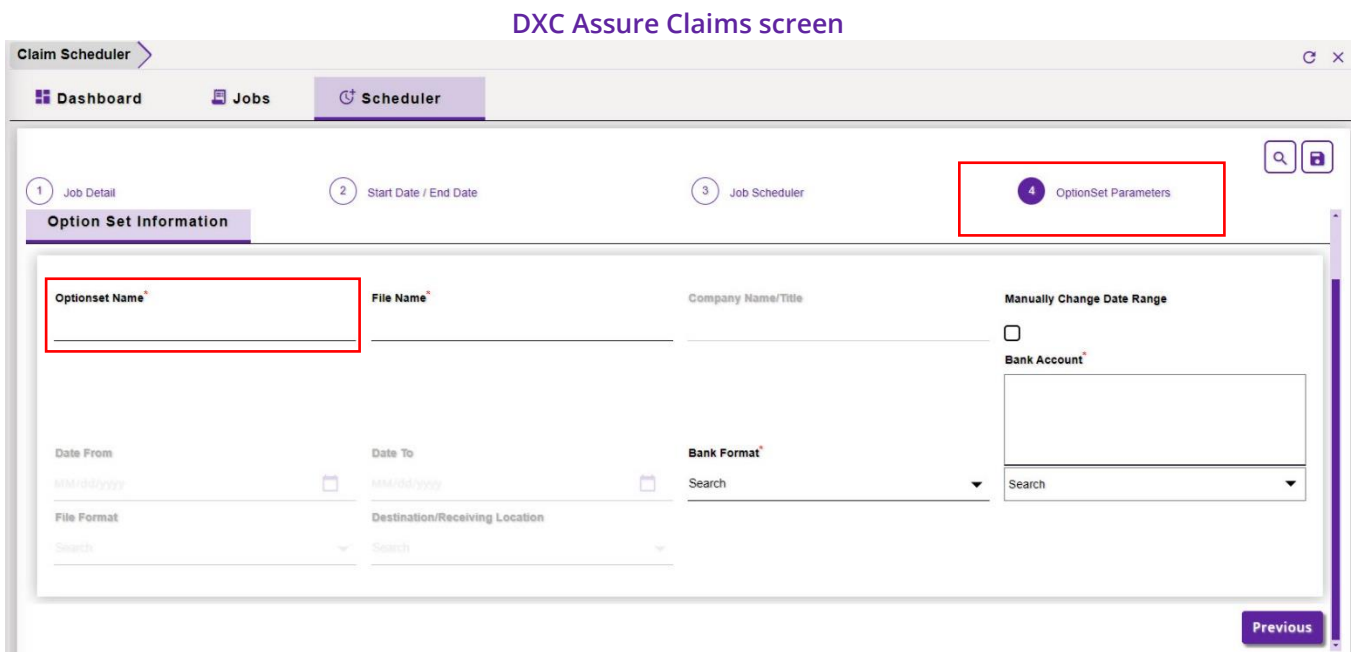- Bank Account
- Bank Account
- File Format
- Destination/Receiving Location

Based on the selections made on this screen, the task will be scheduled, and the PositivePay will be extracted. The created task will be displayed on the Jobs section of the **Task Manager** screen. **[Fig. 15]**

DXC Assure Claims screen

[Fig. 15]

To edit the scheduled task, select the clickable link to get redirected to the respective screen.

> **Note**
>
> ➢ While the Task Manager screen of the PositivePay Extract Tool has been completely redesigned and given a modern look and feel, its functionality has not been altered.
> ➢ The details of an existing PositivePay Extract job will be prefilled in the respective fields if the same task is created again.
> ➢ The data will be auto populated based on the selected Task Type and Sub Task Name.

1099-MISC and NEC Extract

The **1099-MISC And NEC** task type is now available on the **Claim Scheduler** screen of the **Configuration Manager** zone.

With this integrated solution, the 1099 details can now be retrieved through an Extract tool without the involvement of SAP configuration. The 1099 form is used to report non-employment income to the Internal Revenue Service (IRS).

To extract the same, go to **Configuration Manager > Task Manager > Scheduler section.** In the **Job Detail** section, schedule a Task with the newly added **Task Type – 1099-MISC And NEC. E**nter relevant data in the fields of the **Start Date/End Date** and **Job Scheduler** tab.

Next, select necessary filter criterion in the **Optionset Parameter** section. **[Fig. 16]**

DXC Assure Claims screen
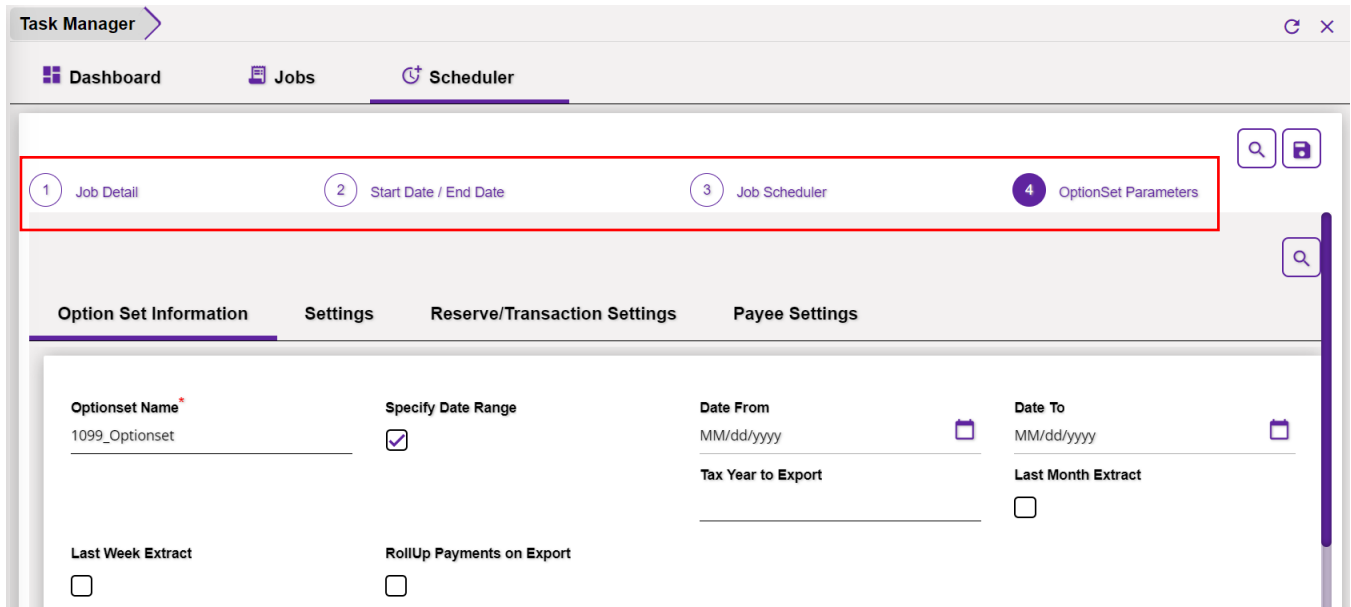
[Fig. 16]

Based on the selections made here, 1099 details will be extracted once the job is executed successfully. The created task will be displayed on the Jobs section of the **Task Manager** screen. [Fig. 17]

DXC Assure Claims screen
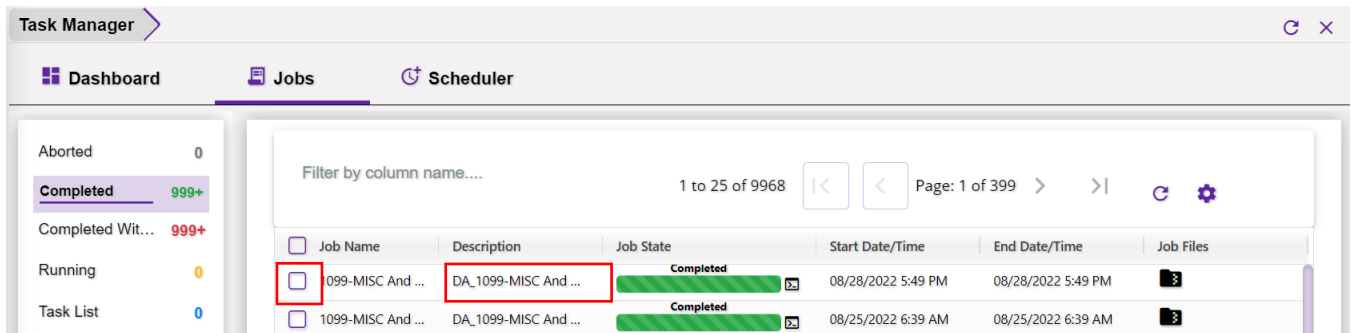
[Fig. 17]

> **Note**
>
> ➢ The legacy DA 1099-MISC and NEC task is no longer available via the Utilities zone. This task can only be accessed via the Configuration Manager zone.

Addition of Entity Type filter options for Box 6

1099-MISC Reporting for Box 6 has been refined with the addition of new selection criteria – **Entity Category** and **Entity Type**. With this enhancement, organizing and searching across 1099-MISC records has been made easier as 1099 Reporting for Box 6 can be refined from a list of Reserve Types as well as from a Subset of Entity Types.
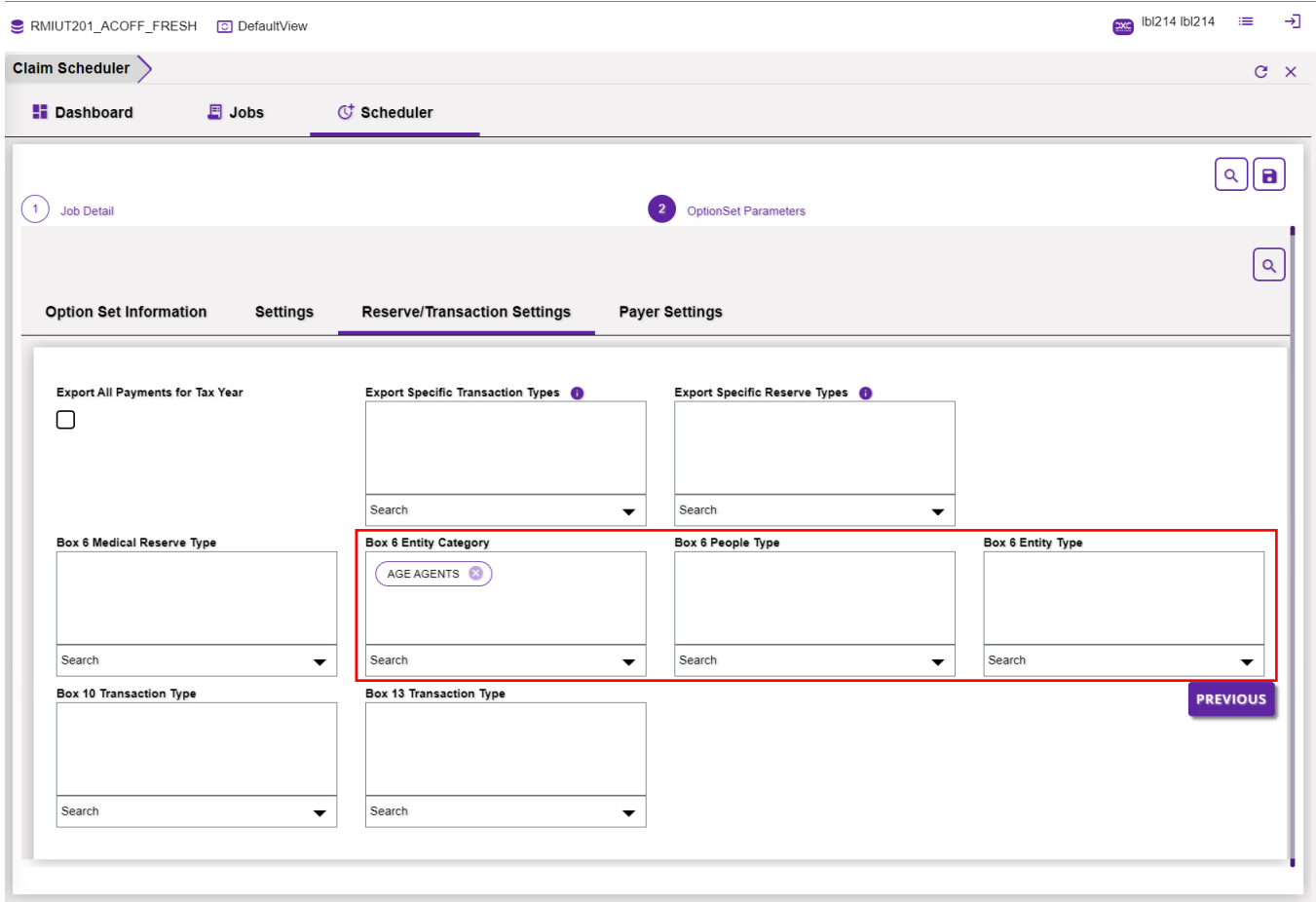
Note

> For systems configured with the System Setting Entity Role marked as ON,
>   • The box listing the **Entity Category** will be displayed.
>   • The box listing the **Entity Type** and **People Type** will be disabled.
> For systems configured with the System Setting Entity Role marked as OFF,
>   • The box listing the **Entity Type** and **People Type** will be displayed.
>   • However, the box listing the Entity Category will be disabled.

After the settings are aligned in place, schedule a **1099-MISC and NEC** job from the **Task Manager** screen. For this, follow the path mentioned below:

Configuration Manager (zone) → Task Manager (screen) → Scheduler (tab) → Schedule 1099-MISC and NEC Task

Based on the System Setting, the Reserve/Transaction section will feature new fields, **Box 6 Entity Category, Box 6 People Type** or **Box 6 Entity Type** field. Make necessary selections and execute the job. The data will be extracted based on the filters applied on the Optionset as well as the Reserve/Transaction screen. **[Fig. 18]**

DXC Assure Claims screen

[Fig. 18]

> **Note**
>
> ➢ Moving forward, this feature will be available only in the new API based solution (Configuration Manager zone). That is, DA 1099 Task will be removed from the legacy Utility zone.

MMSEA Import and Extract

The ability to create and run **MMSEA** jobs via the new **API-based solution** is now available via the Configuration Manager zone. The **Scheduler** screen now features a Optionset window for MMSEA Query and Claim jobs.

MMSEA Query/Claim Input via API-based Extract Tool

Navigate to the path mentioned below to avail the feature and schedule a MMSEA Claim Input job:

Configuration Manager → Claim Scheduler → Scheduler → Job Details → and schedule a Task by selecting MMSEA as Task Type and Export as Sub Task Type. [Fig. 19]

DXC Assure Claims screen

[Fig. 19]

Next, enter the frequency of job execution in **Job Scheduler** to get redirected to the **Option Set Information** tab.

In the **Optionset Parameters** tab, enter relevant data in the mandatory fields namely,

- ➢ **Optionset Name:** Enter a unique name for the Optionset.
- ➢ **RRE ID:** RRE ID can be defined from the Assure Claims fields. There are three fields, Client Information, Department Level and the Policy Level.
- ➢ **File Format:** There are two formats available to choose from, wherein **Claim** (new added) exports the Claimant & Claim details and **Query** exports the Claimant details only.
- ➢ **Claim Type:** Select the Claim Type from the dropdown list.
- ➢ Enable the **Test Export** checkbox.

DXC Assure Claims screen
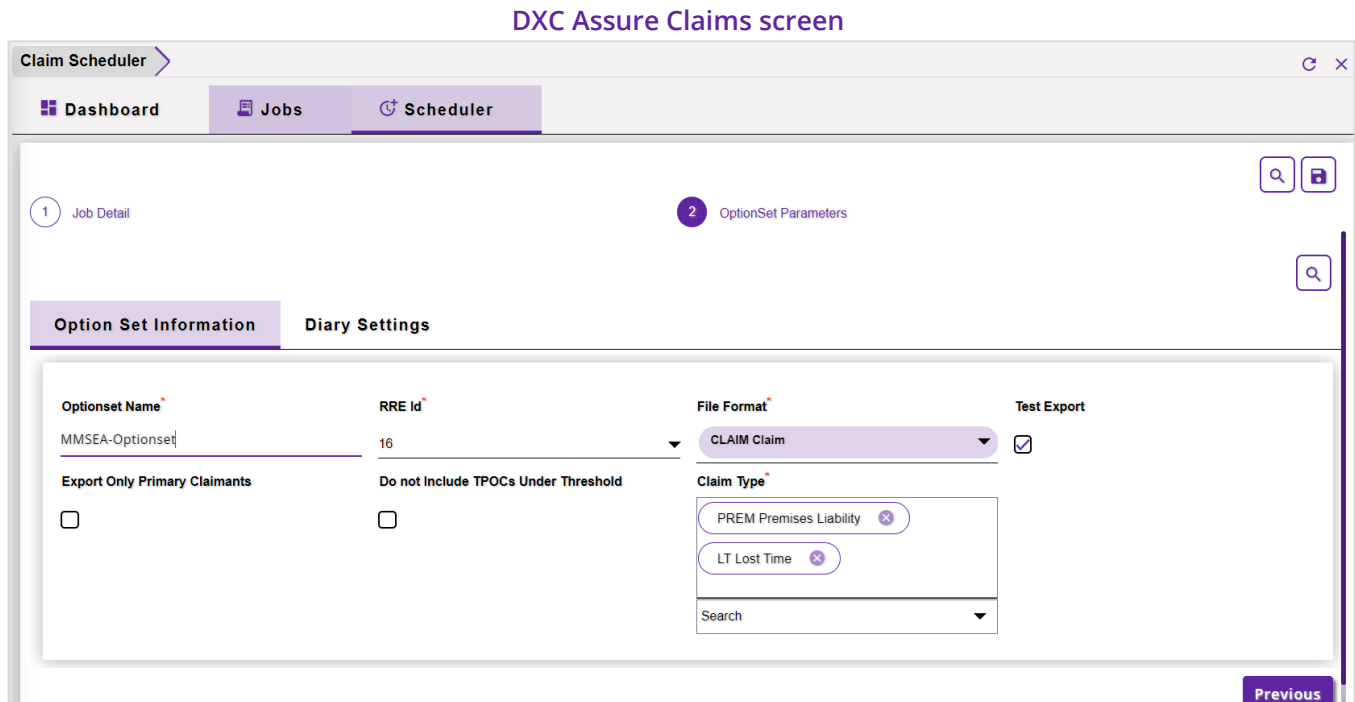
[Fig. 20]

Next, move to next newly added tab, **Diary Settings**. Select the checkbox labelled, **Send Diary To Current Adjuster**, if needed.

Based on the selections made on this screen, the task will be scheduled, and the data will be extracted.

MMSEA Query/Claim Response job execution via API-based Import Tool

Similarly, the MMSEA jobs can be scheduled for Imports as well. To schedule a MMSEA Import Type task, go to **Claim Scheduler → Scheduler → Job Details → and schedule a Task by selecting MMSEA as Task Type and Import as Sub Task Type.**

Fill relevant data in the **Optionset Parameters** tab:

- ➢ **Optionset Name:** Enter a unique name for the Optionset.
- ➢ **Import Type:** The field features two options:
  - **CLAIMANTMMSEA:** CLAIMANTMMSEA can be used to import the Claimant & Claim details via **Claim** file format and the Claimant details via the **Query** file format.
  - **TINMMSEA:** This retrieves the RREID information by using this option.
- ➢ **File Name:** Enter the name of the file for which the import is being executed.

➢ **RRE ID:** RRE ID can be defined from the Assure Claims fields. There are three fields, Client Information, Department Level and the Policy Level.
➢ **Mode Type:** Select the option Both Validation and Data Import.

<p align="center">DXC Assure Claims screen</p>
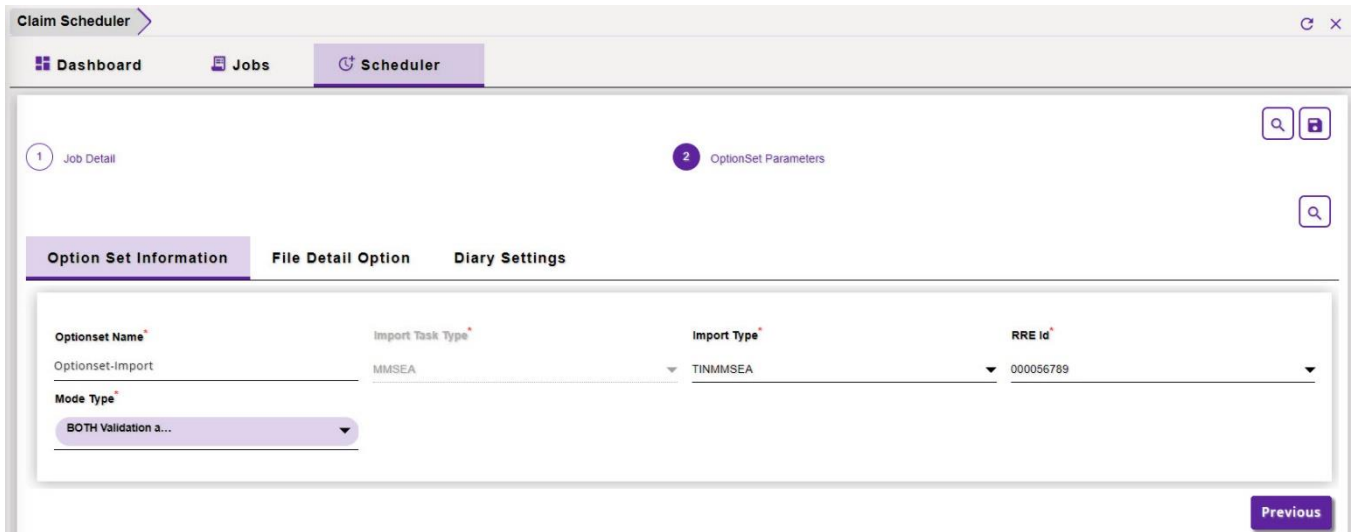
<p align="center">[Fig. 21]</p>

It is important to note that earlier, the path for the **Import File**, whether **Shared**, **SFTP,** or **S3(AWS Storage)**, could only be configured via the **General System Parameters** screen in the **Configuration Manager** zone.

Thus, the **File Detail Option** tab of the window offers the extension of this additional option for **Import File** upload offers enhanced convenience by contributing to a smoother **MMSEA** Import job workflows.

<p align="center">DXC Assure Claims screen</p>
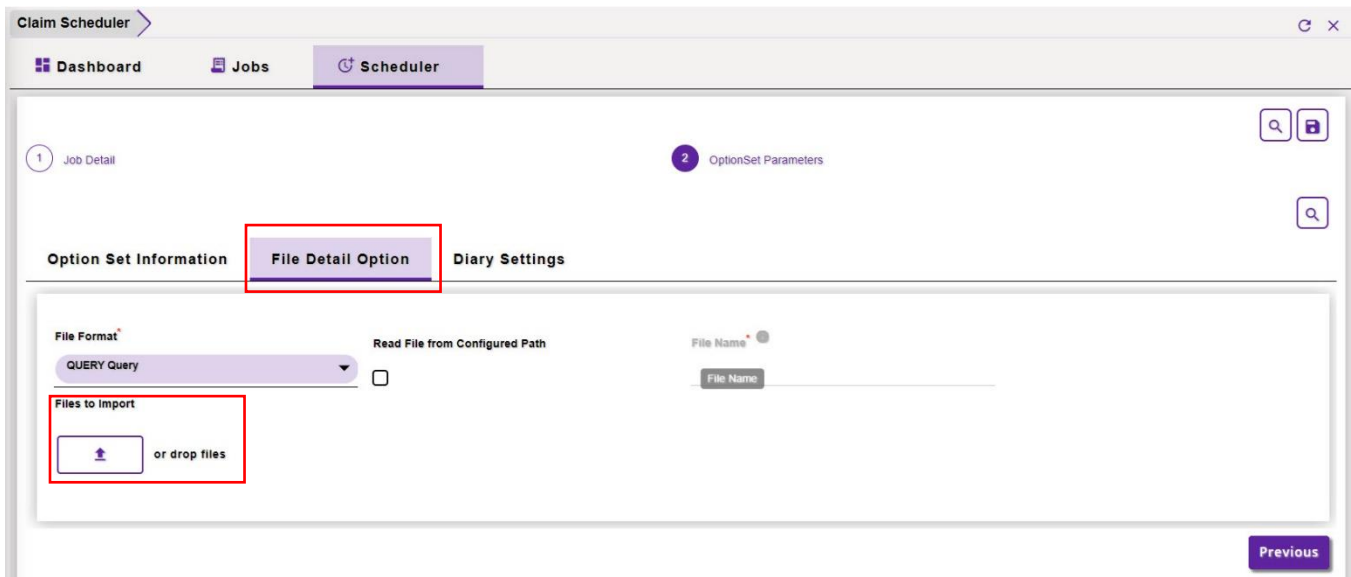
<p align="center">[Fig. 22]</p>

Select the checkbox labelled, **Send Diary To Current Adjuster**, in the **Diary Settings** tab, if required.

The created task will be displayed on the **Jobs** section of the Claim Scheduler screen and the data will be imported.

Improvements in API-based Import and Extract Tool in the Claims Scheduler screen

The **API-based Extract and Import Tools** introduced in the previous releases have been further enhanced to provide better usability in release version 23.4.

New Diary Sharing Option in MMSEA Import & Extract Tool

Earlier, the **MMSEA Import & Extract** jobs via the new **API-based solution** allowed diaries to be shared exclusively with the current adjuster. However, the latest release version of Assure Claims enables the sharing of diaries with additional users as well. This enhancement has been achieved through a newly introduced **Send Diary to Additional Users** option in the **OptionSet Parameters** section of the **MMSEA Import/Extract** job screen. To access this capability, schedule a MMSEA task and in the **Dairy Settings** tab of the **OptionSet Parameter** section, select the newly introduced checkbox, **Send Diary to Additional Users**. **[Fig. 23]**

**DXC Assure Claims Screen**
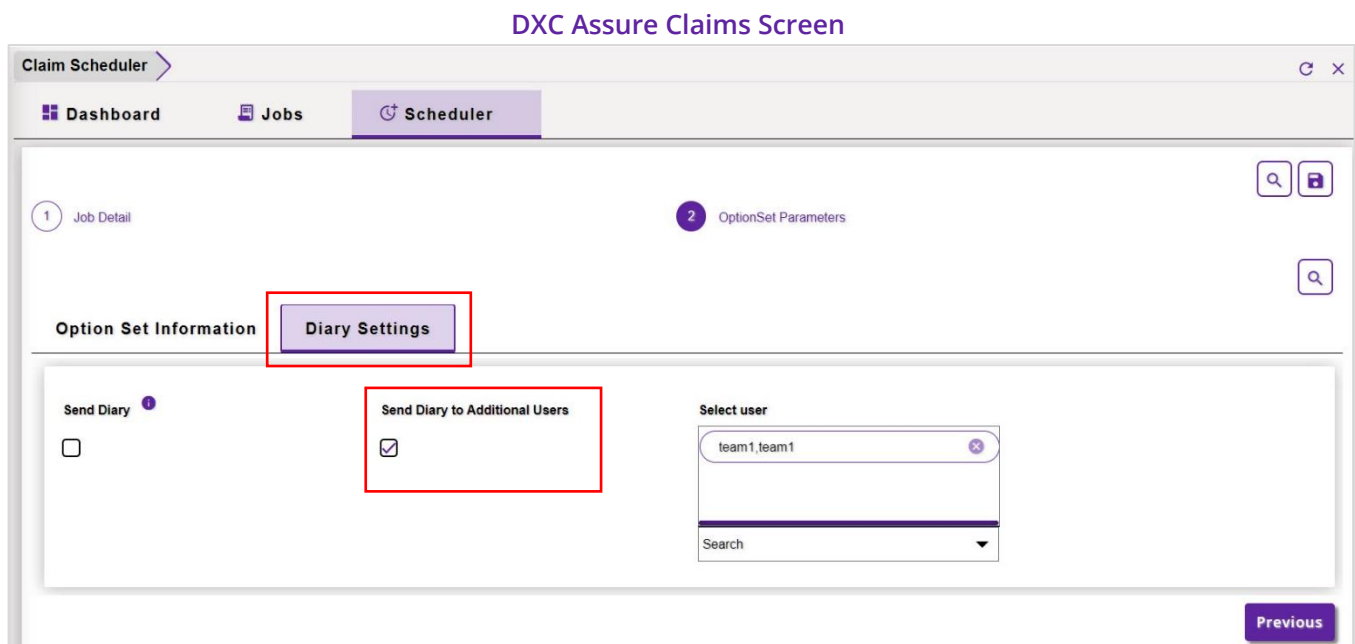
[Fig. 23]

PUS Import Tool

The primary objective of PUS Import tool is to update payment files received from third-party sources. Consequently, the payment data is automatically populated into the Assure Claims system once the import job is successfully executed.

> However, this release version of Assure Claims introduces the API-based PUS Import Tool feature as part of Phase 1 implementation. This API-based solution will undergo further enhancements to incorporate additional features in upcoming releases.

Scheduling a PUS Import job

To schedule a PUS Import job, go to **Configuration Manager → Claim Scheduler → Scheduler section → Job Details → and schedule a Task by selecting PUS as Task Type.** Next, in the **OptionSet Parameters** tab, fill in the following fields.

- ➢ **OptionSet Name:** Enter a unique name for the OptionSet.
- ➢ **Import Task Type: Payment Update System** will be displayed as a default option in this field.
- ➢ **Import Type:** There are two Import Types available, **Payment** and **Payment Details**. Choosing the Payment option will result in an update to the Funds/Transaction screen, whereas selecting the Payment Details option will update the Transaction Detail/Funds Split Detail screen.
- ➢ **File Name:** Enter the file name filename of the document that was previously uploaded based on the Field Mapping Document in the location indicated on the General System Parameter screen.
- ➢ **Mode Type:** This field includes three options namely, **Data Import**, **Validation** & **Validation and Data Import**. In case, Validation and Data Import or Validation option is selected, then, the File Name field will become active. It will remain inactive if Data Import option is selected.
- ➢ **Update Even if Blank or Zero:** If this checkbox is selected, then, the job will be executed even if the fields are blank.

DXC Assure Claims Screen
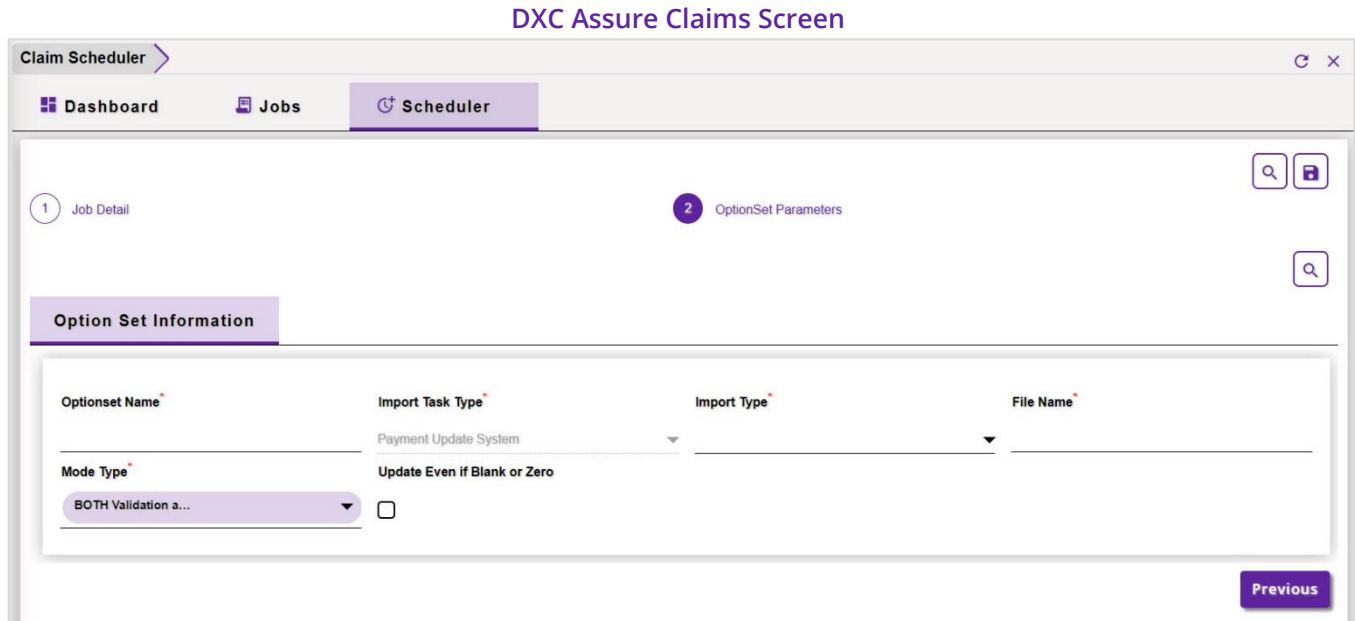
[Fig. 24]

Enter relevant data in the fields and select **Save** to run the job. Based on the selection, the data will be auto populated in the Funds/Transaction screen and Funds Split screen respectively.

Supplemental Field Mapping in PUS Import tool*

A new subtab labeled **Supplemental Field Mapping** is now available on the OptionSet tab to include supplemental data mapping while scheduling a PUS job. It must be noted that the **Supplemental** tab on PUS Optionset screen is visible only when **Payment** option is selected as the **Import Type** and **Data Import** is selected in the field labeled**, Mode Type**.
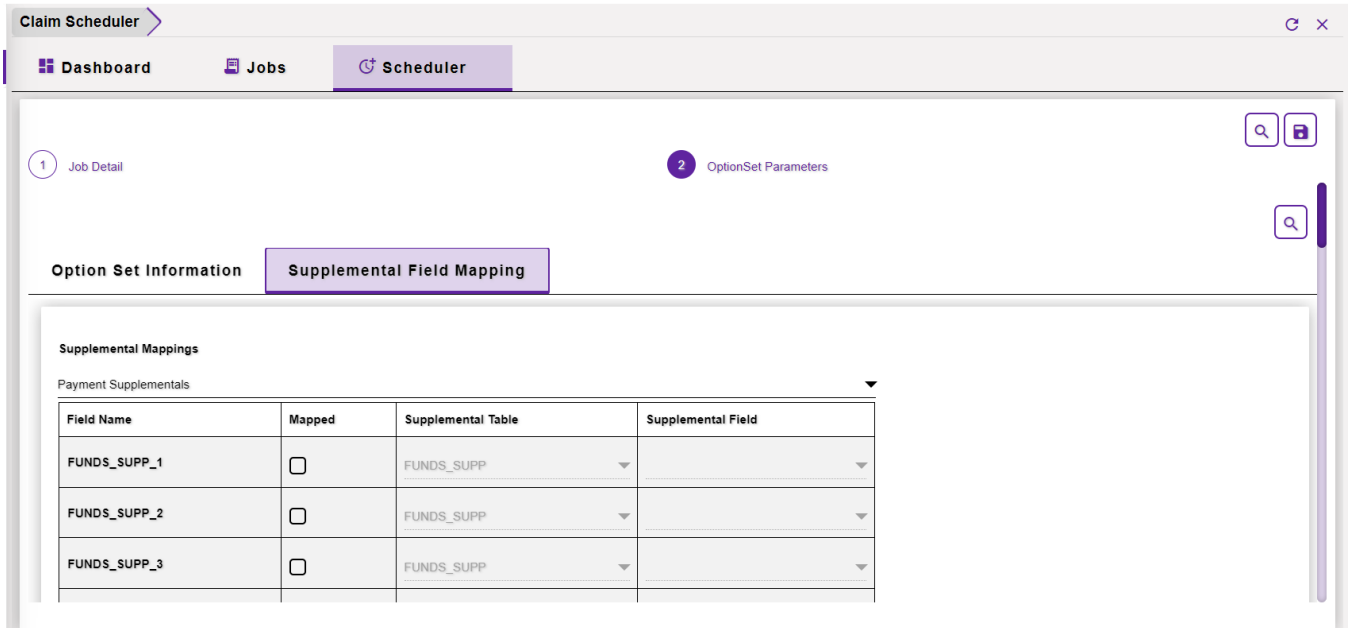
Supplemental Field Mapping subtab screen components

The **Supplemental Mappings** grid available on this subtab consists of **46** Payment Supplemental rows labeled **FUNDS_SUPP_1**… up till **FUNDS_SUPP_46**.

The grid consists of the following columns:

- ➢ **Field Name**
- ➢ **Mapped**
- ➢ **Supplemental Table**
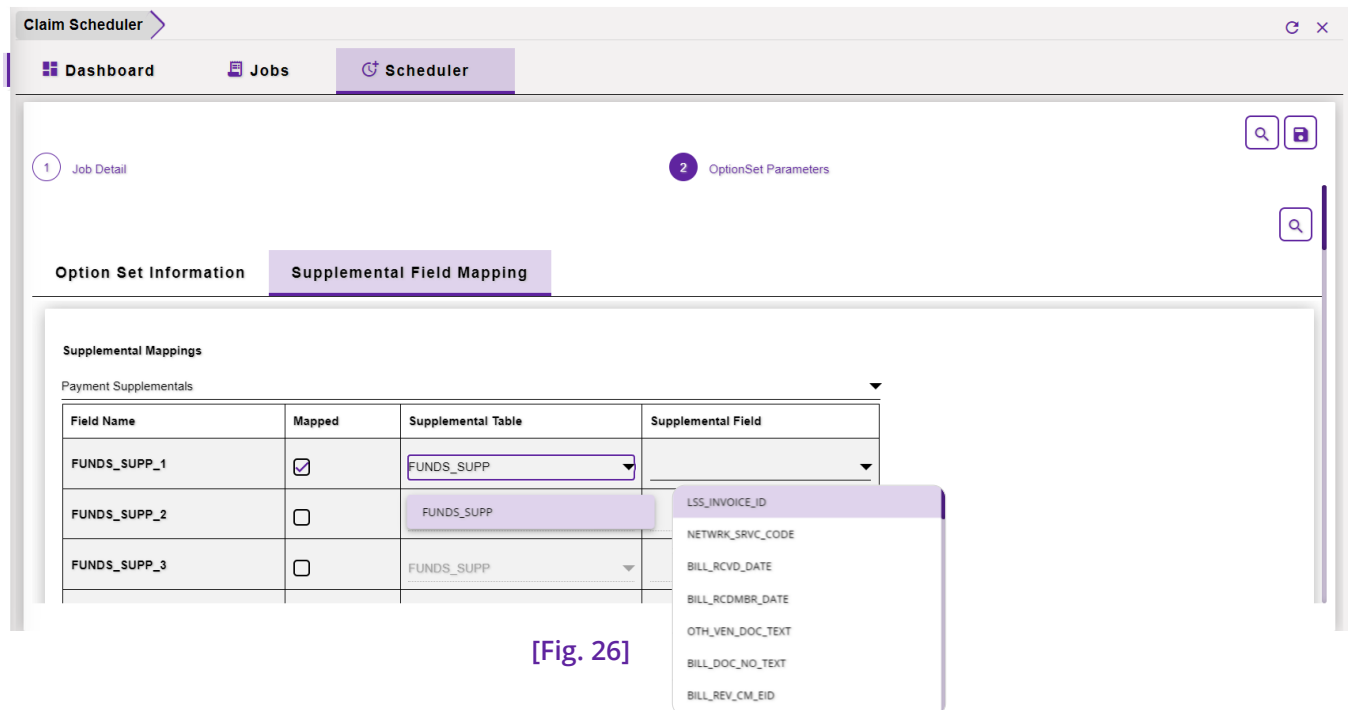- ➢ **Supplemental Field**

DXC Assure Claims screen

[Fig. 25]

The **Mapped** column consists of a **checkbox**, which if selected, will enable the dropdown fields in the **Supplemental Table** and **Supplemental Field** columns. [Fig. 26]

DXC Assure Claims screen

[Fig. 26]

Upon enabling a checkbox under the Mapped column, it will be possible to map the corresponding Supplemental Table with a Supplemental Field so that this mapped data is imported, upon successful

completion of the PUS Import job, and displayed in the Supplementals accordion of the Transaction screen. **[Fig. 27]**

DXC Assure Claims screen
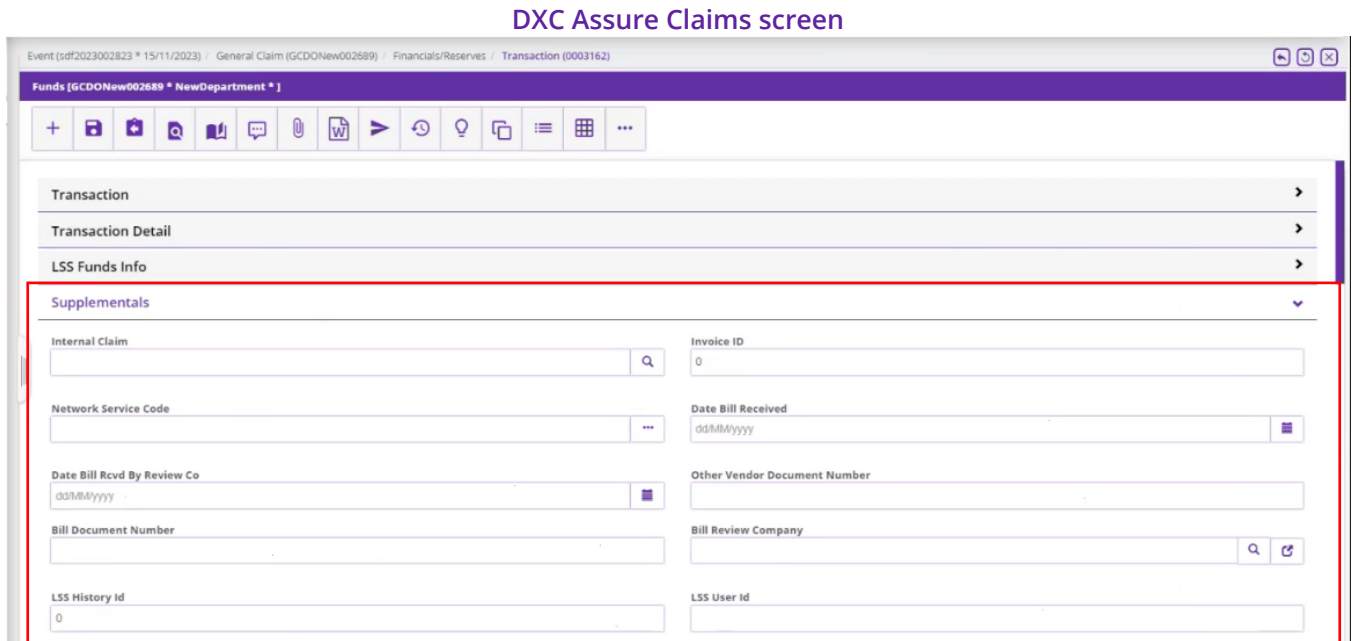

[Fig. 27]

Validation Messages

The validation message "The selected Payment Supplemental Field(s) FUNDS_SUPP_1 has not been mapped" is displayed when attempt is made to save the Supplemental Field Mapping without selecting a Supplemental Field. **[Fig. 28]**

DXC Assure Claims screen
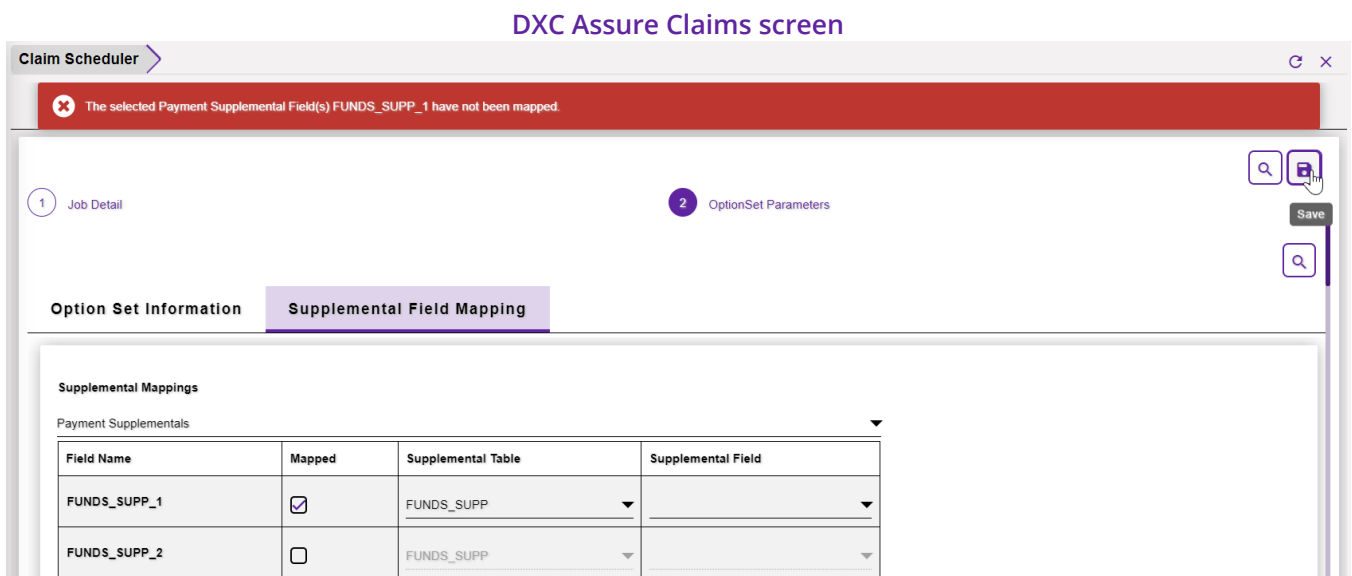
[Fig. 28]

The validation message "Selected supplemental column LSS_INVOICE_ID is mapped more than once with the field(s) FUNDS_SUPP_1 and FUNDS_SUPP_2" when duplicate selections are made in the Supplemental Field column. **[Fig. 29]**

DXC Assure Claims screen
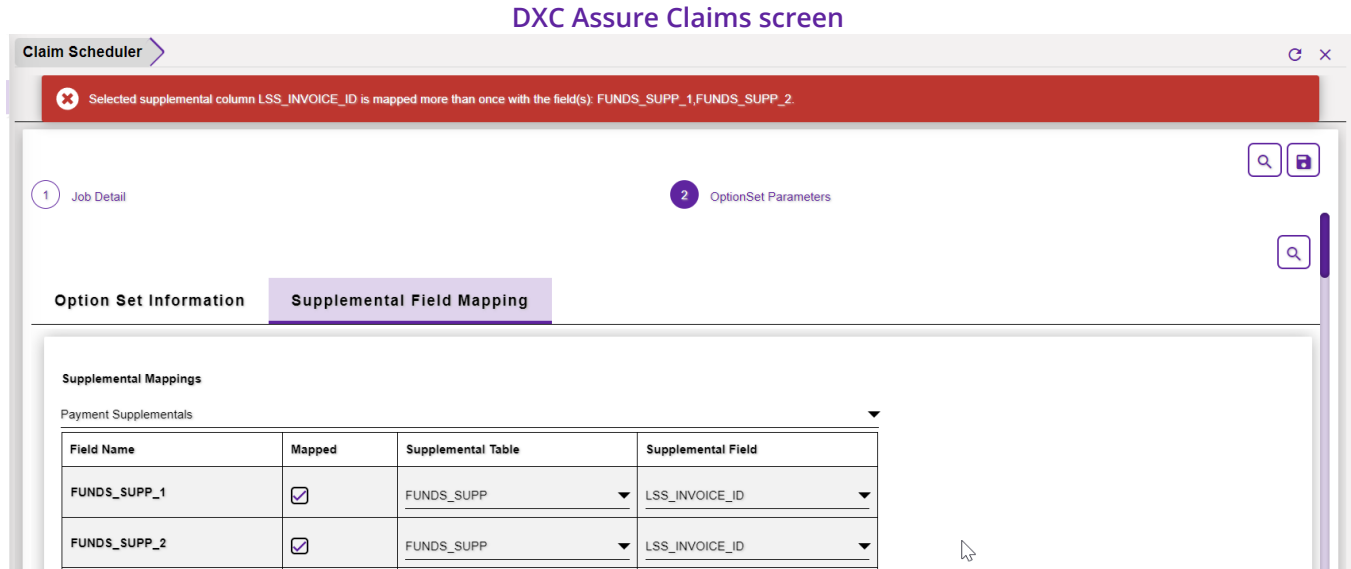
[Fig. 29]

The validation message "The Supplemental Field(s) LSS_INVOICE_ID is mapped multiple times with the Field(s) : FUNDS_SUPP_1, FUNDS_SUPP_2" is displayed when the save button is clicked after making duplicate Supplemental Field selections. **[Fig. 30]**

DXC Assure Claims screen
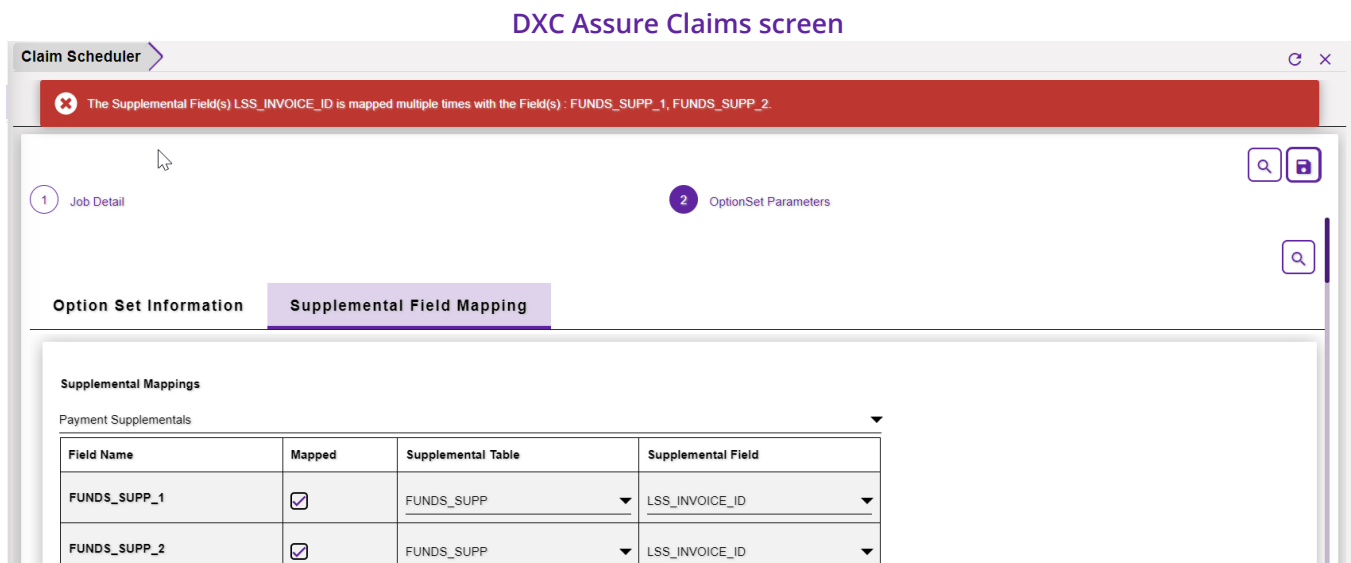
[Fig. 30]

HR Interface Import Tool

Assure Claims v.24.3 introduces the new **API-based HR Interface Import tool** thus rendering the DA-based HR Interface Import tool obsolete.

The **HR Interface Import tool for Employees** offers an option to effortlessly import or validate Employee data. This module simplifies the task of maintaining data integrity, enhances productivity, and provides a seamless method to expedite day-to-day operations and performances.

In simpler terms, the HR Import tool serves as a unidirectional means to bring in employees' demographic information from any external system into the Assure Claims application. Keeping the application in sync with the HR system ensures that employee data remains current when linked to Events or Claims.

The tool initially searches for a matching employee in the Assure Claims database, based on specified settings. If a match is identified, it proceeds to update the existing employee record. In the absence of a match, the tool treats the employee as new and inserts their information into the Assure Claims application.

Scheduling an HR Interface Import Job

To schedule an **HR Interface** Import job, select the **HR_Interface** option for the **Task Type** field followed by the **Import** option for the **Sub Task Name** field, then select the **Run Immediately** checkbox before clicking on the **Next** button.

DXC Assure Claims screen

[Fig. 31]

Upon selecting the **Next** button, the **OptionSet Parameters** section opens.

The various components of the **OptionSet Parameters** section are described below:

DXC Assure Claims screen
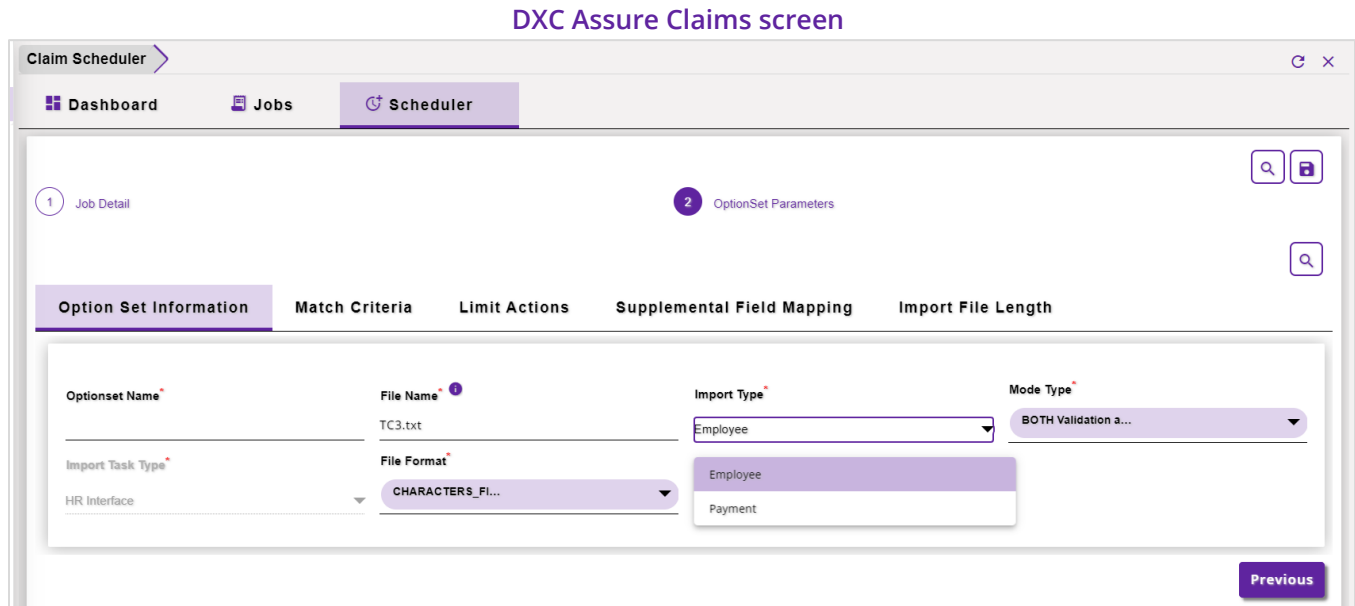
[Fig. 32]

Optionset Information tab

The **Optionset Information** tab consists of the following fields:

➢ **Optionset Name** – enter an apt name in this mandatory field
➢ **File Name** – enter a file name with file extension for the file that will be uploaded at the shared location, SFTP or AWS. This field will be prepopulated if file has already been uploaded
➢ **Import Type** – there are 2 options available, namely
   • Employee
   • Payment

> **Note**
>
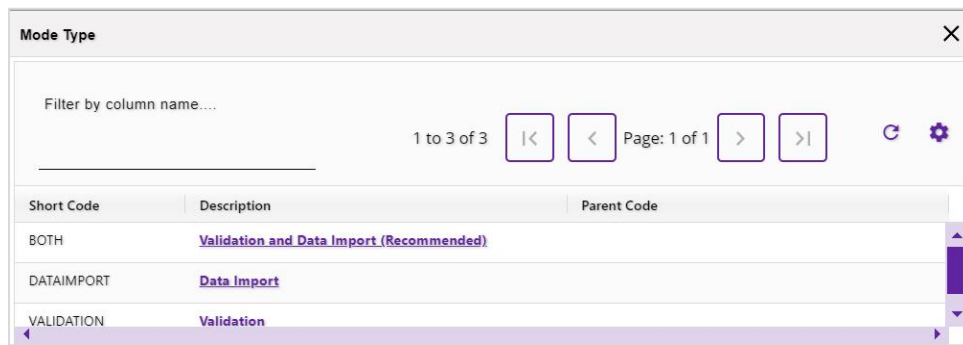> ➢ When Employee is selected as the Import Type option, then the following tabs become available on the OptionSet Parameters screen
>   • Match Criteria
>   • Limit Actions
>   • Supplemental Field Mapping
>   • Import File Length
> ➢ When Payment is selected as the Import Type options, then the following tab becomes available on the OptionSet Parameters screen
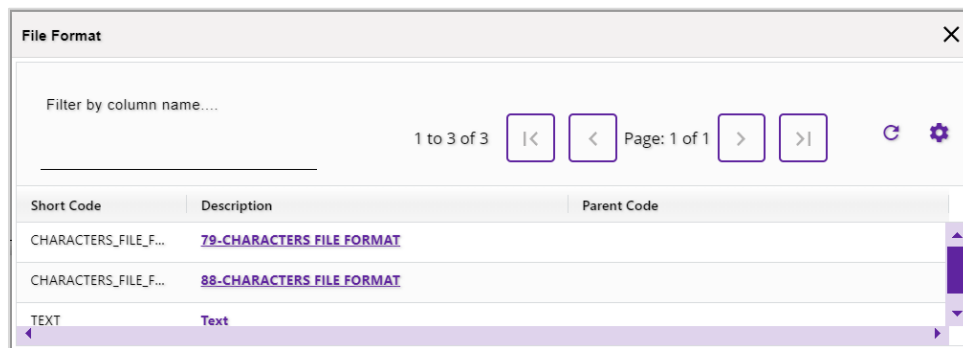>   • Supplemental Field Mapping

➢ **Mode Type** – This field includes three options namely,
- Data Import
- Validation
- Validation and Data Import (recommended)

> **Note**
>
> ➢ In case the Validation and Data Import or the Validation option is selected, then, the File Name field will become editable. It will remain inactive if Data Import option is selected.

Mode Type			✕
Filter by column name….	1 to 3 of 3 |< < Page: 1 of 1 > >|		C ⚙
Short Code	**Description**	**Parent Code**	
BOTH	Validation and Data Import (Recommended)		
DATAIMPORT	Data Import		
VALIDATION	Validation		

➢ **Import Task Type** – is a prepopulated uneditable field
➢ **File Format** – has 3 options to choose from, namely
- 79-Characters File Format (used when Import Type is Payment)
- 88-Characters File Format (used when Import Type is Payment)
- Text (used when Import Type is Employee)

File Format			✕
Filter by column name….	1 to 3 of 3 |< < Page: 1 of 1 > >|		C ⚙
Short Code	**Description**	**Parent Code**	
CHARACTERS_FILE_F…	79-CHARACTERS FILE FORMAT		
CHARACTERS_FILE_F…	88-CHARACTERS FILE FORMAT		
TEXT	Text		

When "Employee" is selected as the Import Type

As mentioned above, when the **Employee** option is selected in the **Import Type** field, then the following tabs become available:

➢ **Match Criteria**
➢ **Limit Actions**

➢ **Supplemental Field Mapping**
➢ **Import File Length**

Match Criteria tab

The **Match Criteria** tab includes the following two matching criteria –

➢ **Employee Match Criteria**
- Employee Number
- Employee Number and Last Name
- Employee Number if not match then SSN
- Employee SSN
➢ **Supervisor Match Criteria**
- First Name and Last Name
- First Name, Last Name and Employee Number
- First Name, Last Name and Tax ID
- First Name, Last Name and Employee Number/Tax ID

The new employee data in the import file that aligns with the selected criteria in this tab will be imported, resulting in the update of existing **Employee** and **Entity** records. **[Fig. 33]**

DXC Assure Claims screen

[Fig. 33]
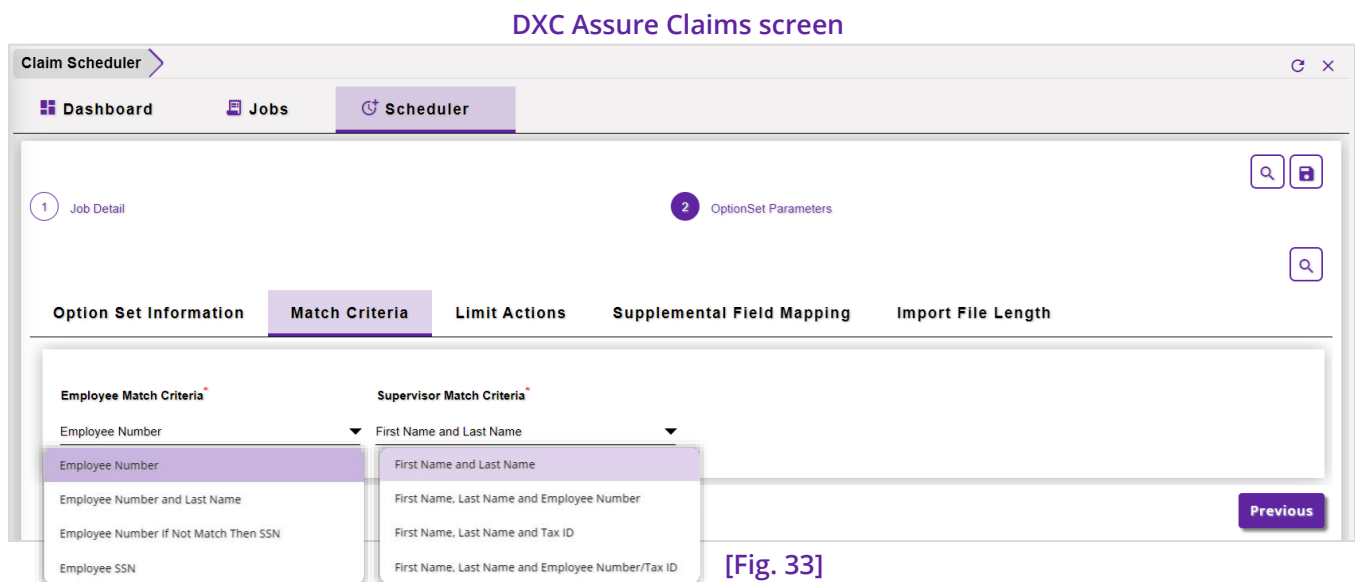
Limit Actions tab

Next, the **Limit Actions** tab **[Fig. 31]** presents several checkbox options to choose from. These are:

- ➢ **Do not update Email field (only insert new)**
- ➢ **Do not update Hourly Rate if new value is zero**
- ➢ **Do not update Weekly Rate if new value is zero**
- ➢ **Do not import if Department is missing or does not exist**
- ➢ **Default workdays per week**
- ➢ **Ignore Duplicate SSN**

Choose the relevant ones to apply limits to the import criterion.

DXC Assure Claims screen
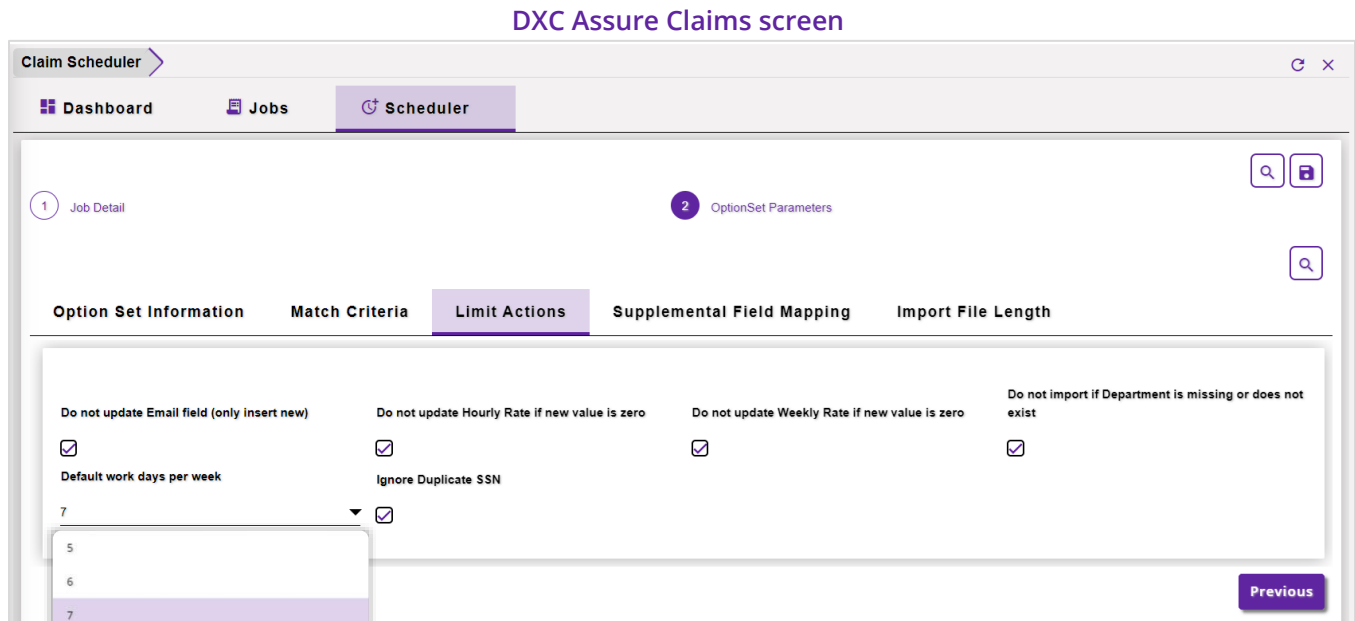
[Fig. 34]

> **Note**
> - ➢ If the checkbox "Ignore Duplicate SSN" is not selected, then Import Errors may be logged due to the presence of duplicate SSN(s) in the Import File
> - ➢ As a result, entry for the new employee will not be created in the database
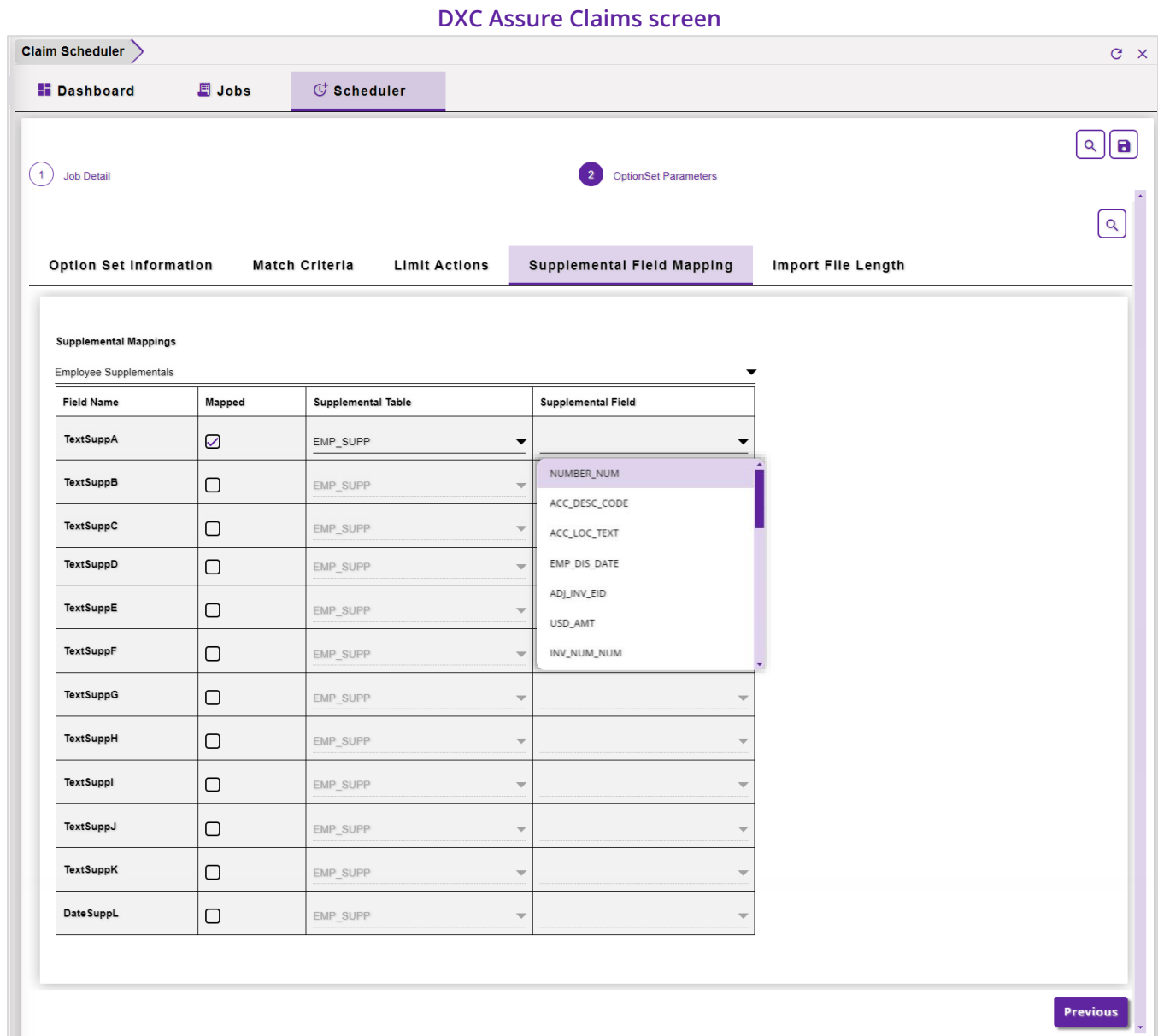
Supplemental Field Mapping tab

Next in the **OptionSet Parameters** section if the **Supplemental Field Mapping** tab **[Fig. 32]** which is used to include employee supplemental data mapping while scheduling a **HR Import** job.

The **Employee Supplemental** mappings grid consists of the following columns:

➢ **Field Name**
➢ **Mapped** (checkbox)
➢ **Supplemental Table**
➢ **Supplemental Field**

Along with these, the **Employee Supplemental** mappings grid consists of **12 rows** labeled **TextSuppA** till **TextSuppK** and the last row labeled **DateSuppL**.

DXC Assure Claims screen

[Fig. 35]

Upon enabling a checkbox under the **Mapped** column, it will be possible to map the corresponding **Supplemental Table** with a **Supplemental Field** so that this mapped data is imported, upon successful completion of the **HR Interface Import** job.

Import File Length tab

Lastly, the **Import File Length** tab displays a set of 49 fields, providing an option to update the import file length. In case, certain fields are not being imported, they can be left at their default value, which is zero.

DXC Assure Claims screen

[Fig. 36]

> **Note**
>
> ➢ The sequence of these 51 fields must not be altered for successful records import
> ➢ The system will display a position length error in case this sequence is disrupted

Once all requisite information is filled and the **HR Interface Import** task is executed successfully, the relevant employee data will be imported and filled in the respective fields of the **Employee** and **Entity Maintenance** screens of the **Maintenance** zone. In the **Employee** screen, the imported data will be populated in the **Employee**, **Employment Info** and **Employee Info** accordions, respectively.

When "Payment" is selected as the Import Type

On the **Option Set Information** tab, when **Payment** is selected as the **Import Type**, then only the **Supplemental Field Mapping** tab becomes available on the on the **OptionSet Parameters** section. **[Fig. 37]**

DXC Assure Claims screen

[Fig. 37]

Move to the **Supplemental Field Mapping** tab after making all requisite selections on the **Option Set Information** tab. **[Fig. 38]**

Supplemental Field Mapping tab

The Supplemental Field Mapping tab consists of a grid with the following columns, checkbox, and rows:

- ➤ **Field Name** (column)
- ➤ **Mapped** (checkbox)
- ➤ **Supplemental Table** (column)

- ➤ **Supplemental Field** (column)
- ➤ **Vendor ID** (row)
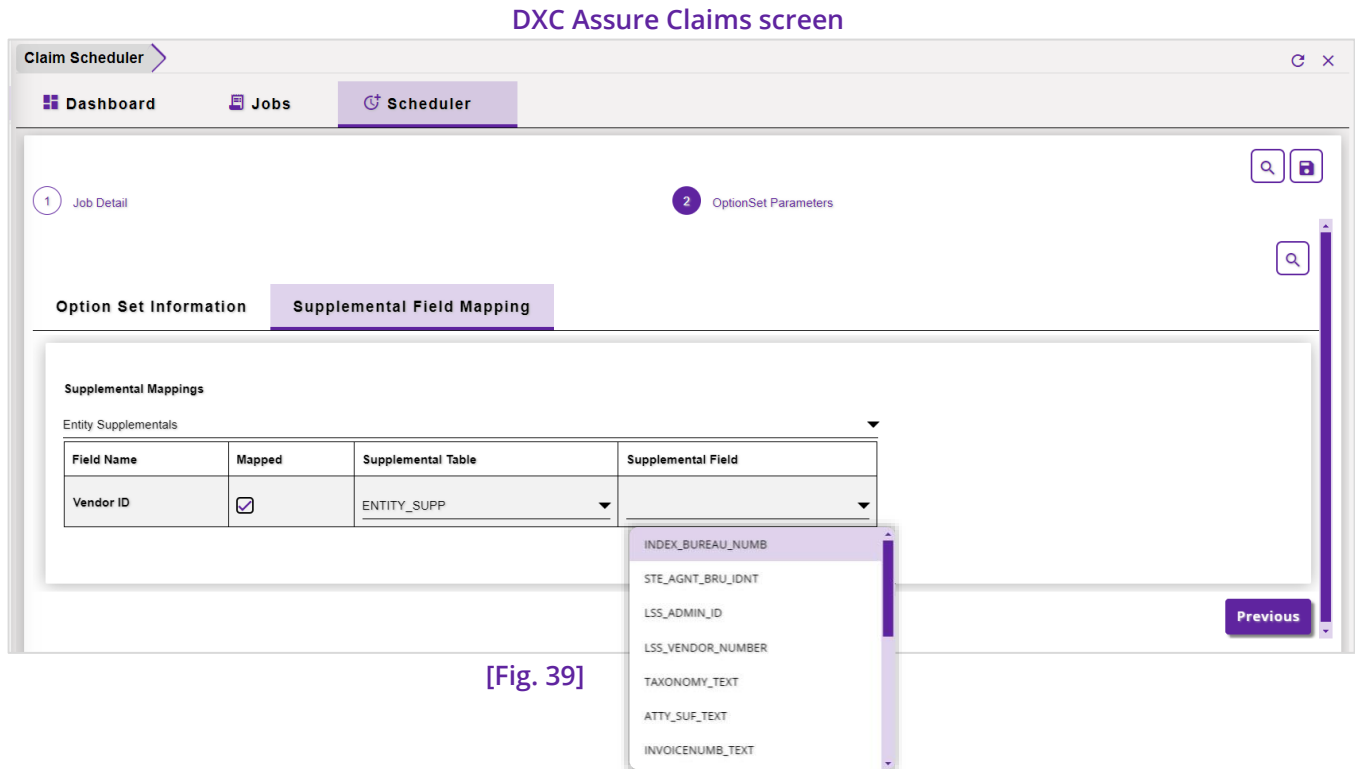
DXC Assure Claims screen

[Fig. 39]

Upon enabling a checkbox under the **Mapped** column, it will be possible to map the corresponding **Supplemental Table** with a **Supplemental Field** so that this mapped **Payment** data is imported, upon successful completion of the **HR Interface Import** job.

Validation Messages

The following are the validation messages that you can come across while scheduling an HR Interface Import job.

DXC Assure Claims screen

[Fig. 40]

DXC Assure Claims screen

[Fig. 41]

DXC Assure Claims screen

[Fig. 42]

DXC Assure Claims screen

[Fig. 43]

DXC Assure Claims screen

Claim Scheduler

- ❌ MaritalStatus length must be in between 0 and 25
- ❌ Sex length must be in between 0 and 25
- ❌ Birth Date length must be in between 0 and 8
- ❌ Hire Date length must be in between 0 and 8
- ❌ Filler Size length must be in between 0 and 50
- ❌ SSN length must be in between 0 and 20
- ❌ Cost Center Code length must be in between 0 and 25

Sex	MaritalStatus	Home Phone	Address	Address 2	City
0	0	0	5	6	6

State	Zip Code	NCCI Class Code	Department Abbreviation	County	Country
2	5	4	6	3	3

[Fig. 44]

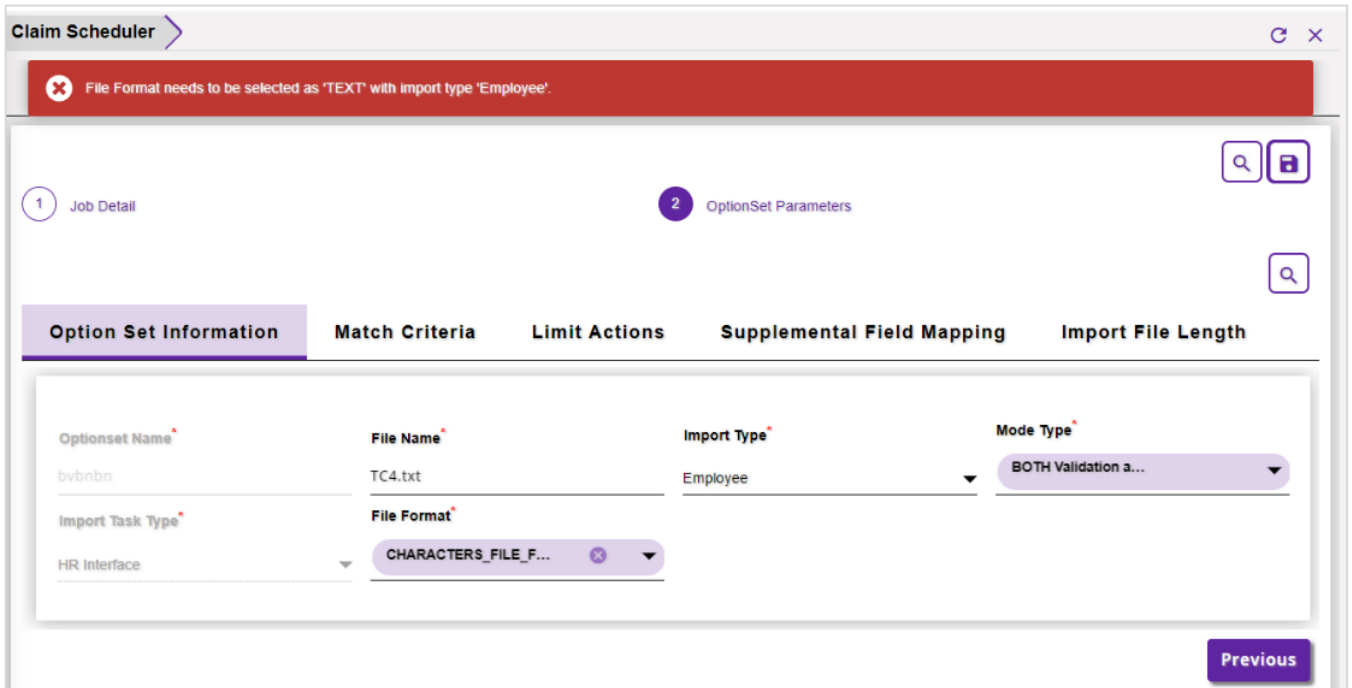**DXC Assure Claims screen**

Claim Scheduler

- ❌ Text Supp E length must be in between 0 and 255
- ❌ Text Supp D length must be in between 0 and 255
- ❌ Text Supp C length must be in between 0 and 255
- ❌ Text Supp B length must be in between 0 and 255
- ❌ Text Supp A length must be in between 0 and 255
- ❌ Supervisor Tax ID length must be in between 0 and 20
- ❌ Supervisor Employee Number length must be in between 0 and 20
- ❌ Driver License number length must be in between 0 and 20
- ❌ Job Class length must be in between 0 and 25

0	0	0	0	0	0

Text Supp I	Text Supp J	Text Supp K	Date Supp L
0	0	0	0

[Fig. 45]

DXC Assure Claims screen

Claim Scheduler					↻ ✕

❌ Date Supp L length must be in between 0 and 8

❌ Text Supp K length must be in between 0 and 255

❌ Text Supp J length must be in between 0 and 255

❌ Text Supp I length must be in between 0 and 255

❌ Text Supp H length must be in between 0 and 255

❌ Text Supp G length must be in between 0 and 255

❌ Text Supp F length must be in between 0 and 255

Job Class	Driver License number	Supervisor Employee Number	Supervisor Tax ID	Text Supp A	Text Supp B
0	0	0	0	0	0
Text Supp C	Text Supp D	Text Supp E	Text Supp F	Text Supp G	Text Supp H
0	0	0	0	0	0
Text Supp I	Text Supp J	Text Supp K	Date Supp L		
0	0	0	0		

[Fig. 46]

DXC Assure Claims screen

Claim Scheduler					↻ ✕

❌ Supervisor Last Name length must be in between 0 and 255

❌ Supervisor First Name length must be in between 0 and 255

❌ Weekly Rate length must be in between 0 and 53

❌ Hourly Rate length must be in between 0 and 53

❌ Also Known As length must be in between 0 and 50

❌ Last Name length must be in between 0 and 255

❌ Middle Name length must be in between 0 and 255

Job Class	Driver License number	Supervisor Employee Number	Supervisor Tax ID	Text Supp A	Text Supp B
1	7	4	4	0	0
Text Supp C	Text Supp D	Text Supp E	Text Supp F	Text Supp G	Text Supp H
0	0	0	0	0	0
Text Supp I	Text Supp J	Text Supp K	Date Supp L		
0	0	0	0		

[Fig. 47]

DXC Assure Claims screen

[Fig. 48]

DXC Assure Claims screen

[Fig. 49]

DXC Assure Claims screen

Claim Scheduler

❌ Country length must be in between 0 and 25

❌ County length must be in between 0 and 50

❌ Department Abbreviation length must be in between 0 and 25

❌ NCCI Class Code length must be in between 0 and 25

❌ Zip Code length must be in between 0 and 10

❌ State length must be in between 0 and 5

❌ City length must be in between 0 and 50

❌ Address 2 length must be in between 0 and 100

❌ Address length must be in between 0 and 100

Work Phone (Office)	Fax Number	Termination Date	Pay Type Code	Active Flag	Full Time Flag
9	7	8	1	1	1
Exempt Flag	**Employee Number**	**Position Code**	**Email Address**	**First Name**	**Middle Name**
1	7	3	15	3	1

[Fig. 50]

DXC Assure Claims screen

Claim Scheduler

❌ Please select File Format.

① Job Detail 　　　　　　② OptionSet Parameters

Option Set Information | Match Criteria | Limit Actions | Supplemental Field Mapping | Import File Length

| Optionset Name*	File Name*	Import Type*	Mode Type*
bvbnbn	TC4.txt	Employee	BOTH Validation a...
Import Task Type*	**File Format***		
HR Interface	Search		

Previous

[Fig. 51]

HR Interface Export Tool

The API-based **HR Interface Export Tool** is now available on the **Claim Scheduler** screen of the **Configuration Manager** zone. This **HR Interface** enables the effortless export of Payee data associated with Payments made within the Assure Claims system.

To schedule an **HR Interface Export** job, navigate the following path and schedule a HR Interface Export Task:

Configuration Manager → **Claim Scheduler** → **Scheduler** (tab) → **Job Details** (section) → schedule a Task by selecting **HR_Interface** as **Task Type** with **Sub Task Name** as **Export**.

DXC Assure Claims screen
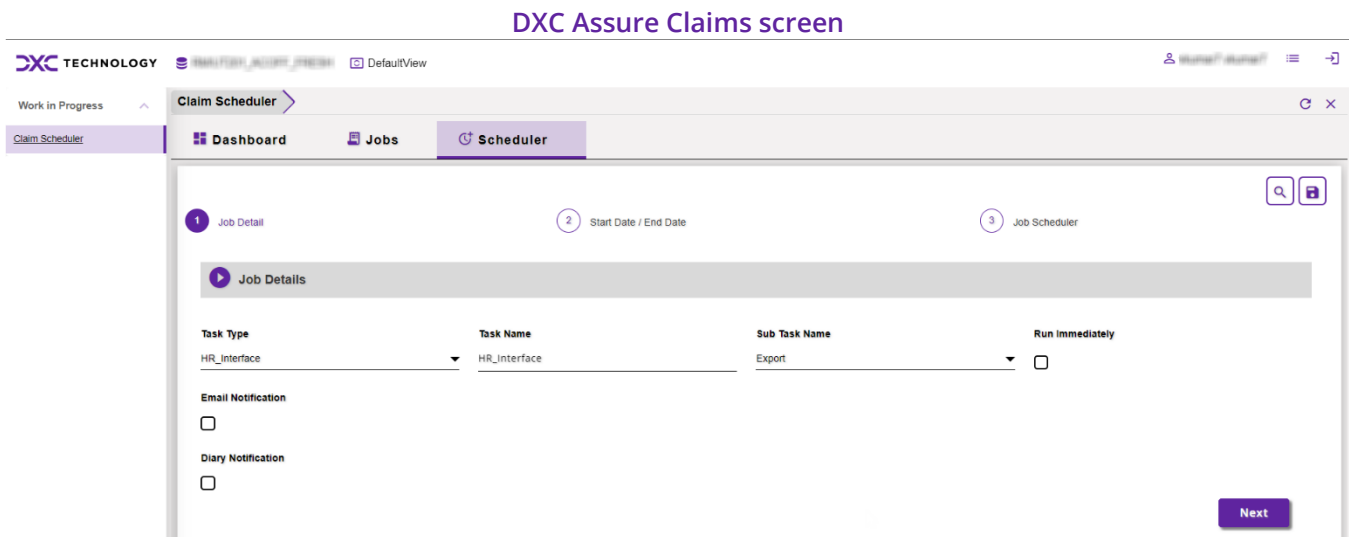
[Fig. 52]

The Scheduler screen for HR Interface Export consists of three sections – **Job Detail**, **Start Date/End Date** and **Job Scheduler**.

The Job Detail section consists of the following dropdown fields and checkboxes:

➢ **Task Type** (select the **HR Interface** option from the dropdown)
➢ **Task Name** (field auto populates when **Task Type** is selected)
➢ **Sub Task Name** (select **Export** from the dropdown)
➢ **Email Notification** (select this checkbox to set up task completion/failure notifications via email to designated recipients)
➢ **Diary Notification** (select this checkbox to set up task completion/failure notifications as Diaries to designated users)
➢ **Run Immediately** (selecting this checkbox runs the HR Interface task immediately)
  • Selecting this checkbox removes the **Start Date/End Date** and **Job Scheduler** sections

Selecting the **Run Immediately** checkbox followed by the **Next** button opens the **Optionset Parameters** section. **[Fig. 53]**

DXC Assure Claims screen
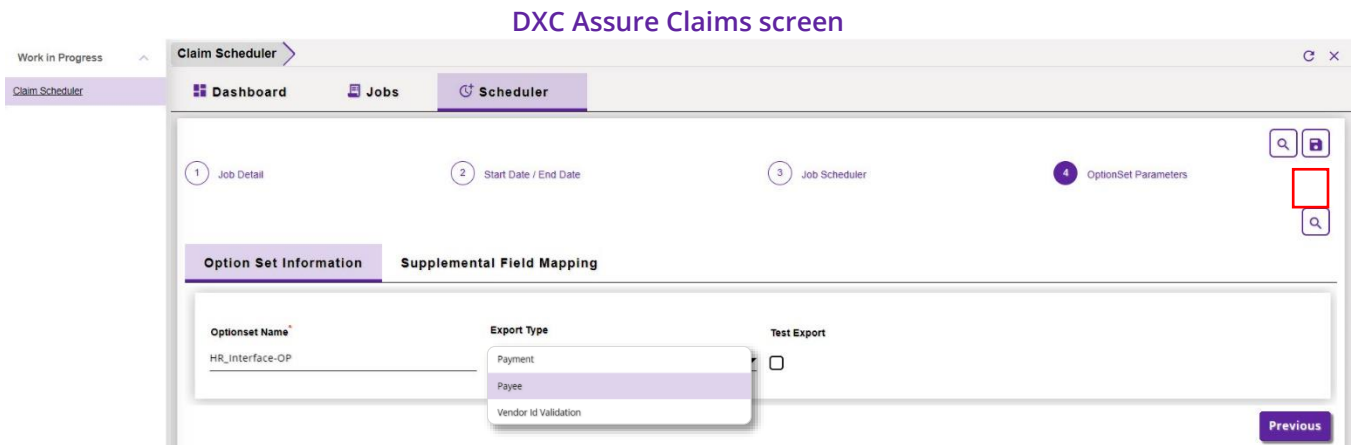
[Fig. 53]

The **Optionset Parameters** section for a **HR Interface Export Task** consists of the following:

➢ **Optionset Name** (mandatory field)
➢ **Test Export:** Typically, when an extract job is executed, the same data cannot be extracted again. By selecting this checkbox, the extraction of a test export file is enabled. This allows verification before extracting the final export file.
➢ **Export Type** (dropdown)
  • Payment
  • Payee
  • Vendor ID Validation

Of the three Export Types, **Payment** and **Vendor ID Validation** extracts have associated **Supplemental Field Mappings**. These mappings enable the extraction of supplemental information against Payment or Vendor ID Validation.

To extract specific supplemental information for a particular Optionset, select the desired option from the **Supplemental Mappings** dropdown list. The respective **Field Names** will be displayed. Next, activate the checkboxes next to each field and map its **Supplemental Table** to the corresponding **Supplemental Field**. **[Fig. 54]**

The **Payment** Optionset comprises four **Supplemental Mapping** options, each of which includes the following corresponding supplemental fields:

➢ Payment Supplementals
  • Payment Terms
  • RU # (mandatory field)
  • Special Handling
 • Separate Checks
  • Account # (mandatory field)

> ➢ Employee Supplementals
>> • Employee Vendor ID
> ➢ Entity Supplementals
>> • Entity Vendor ID
> ➢ Physician Supplementals
>> • Physician Vendor ID

Select the **Vendor ID Validation** Optionset to verify whether the Payee Entity has a valid vendor ID or not. In this context, the Payee Entity is referred to as the vendor. The supplemental mapping options along with their respective supplemental fields for **Vendor ID Validation** are listed below:

> ➢ Employee Supplementals
>> • Employee Vendor ID
> ➢ Entity Supplementals
>> • Entity Vendor ID
> ➢ Physician Supplementals
>> • Physician Vendor ID

DXC Assure Claims screen
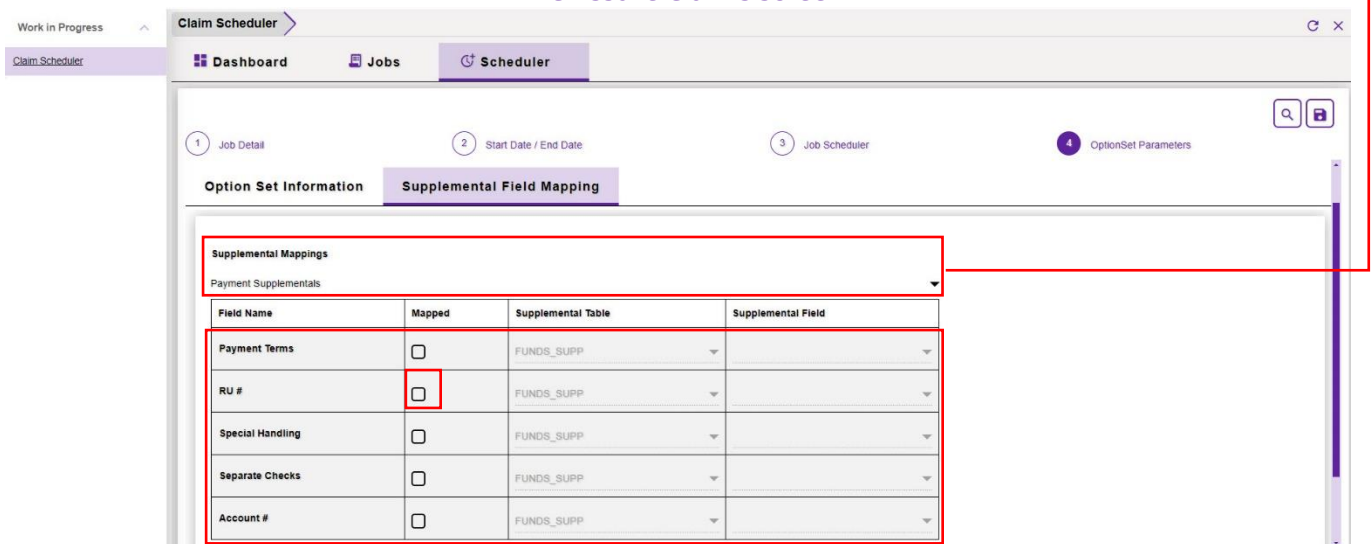
[Fig. 55]

A **HR Interface Export Task** can be scheduled by entering an appropriate **Optionset Name** followed by selecting the desired **Export Type**. Finally, selecting the **Save** button runs the task immediately.

The scheduled **HR Interface Export Task** for the selected **Export Type** can be seen in the **Task List** node of the **Jobs** tab on the **Claim Scheduler** screen. **[Fig. 56]**
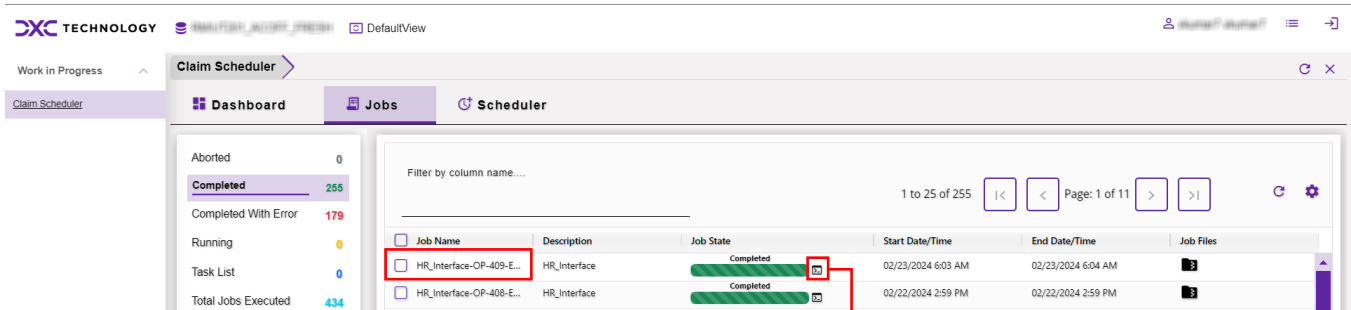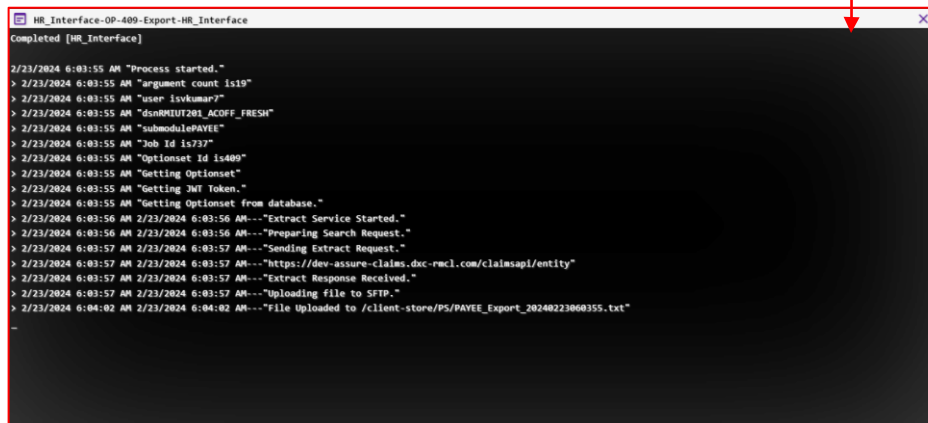
DXC Assure Claims screen
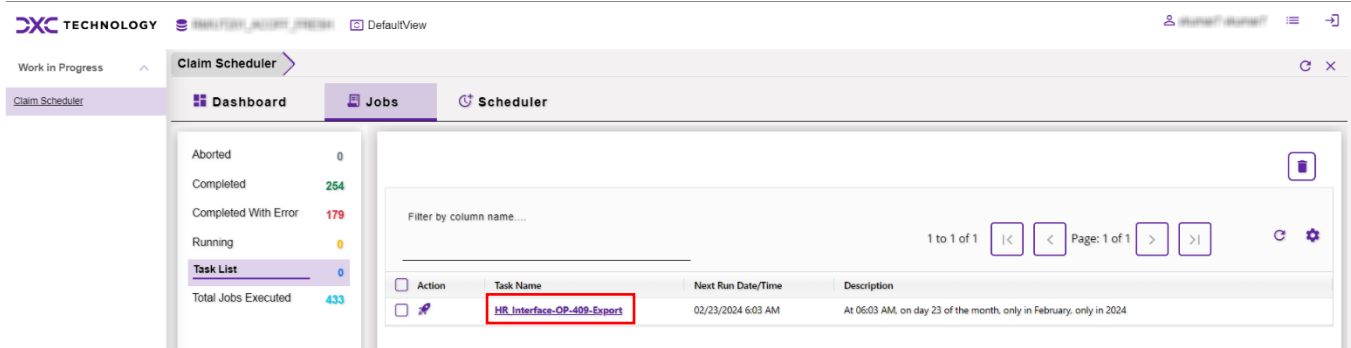
[Fig. 57]

When the Task has run successfully, it can be viewed in the **Completed** node of Jobs tab. **[Fig. 58]**

DXC Assure Claims screen

[Fig. 58]

The HR Interface Payee Export Task log can be viewed by clicking on the icon in the Job State column.

A new "Job State" for correct job status reporting of Import/Export Jobs

A new **Job State** – "**Completed With Validation Errors**" is now available on the **Jobs** tab of the **Claim Scheduler** screen in the Configuration Manager zone.

> Until the previous release, **Import/Export** jobs with validation errors generated during execution were also labeled as **Completed** under the Job State column giving a false impression of their successful execution. Now, when **Import/Export** jobs are flagged as "**Completed With Validation Errors"** it provides users with an opportunity to fix/resolve their underlying issues.
>
> Thus, the introduction of this new Job State "**Completed with Validation Errors"** ensures that correct job statuses are reported for each executed **Import** or **Export** job.

DXC Assure Claims screen
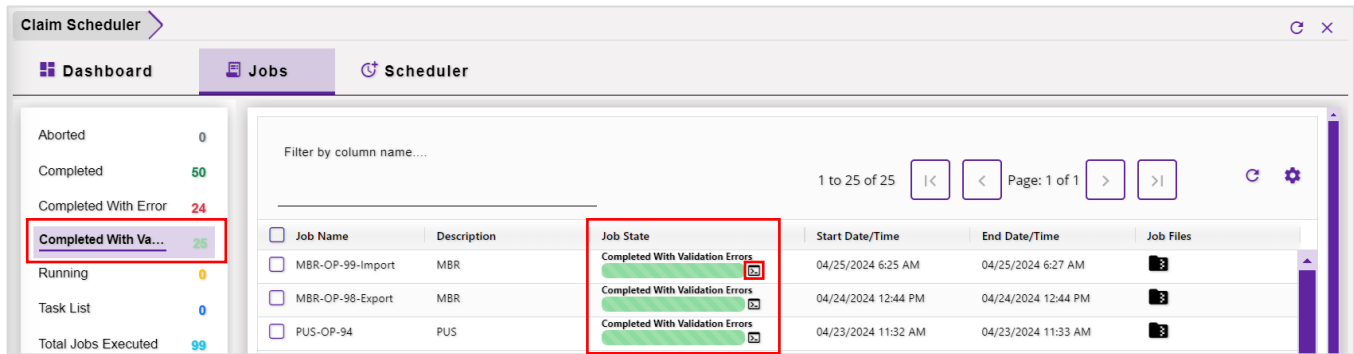
[Fig. 59]

Troubleshooting the API Based Data Exchange Tools

Issue: The Import/Export Job fails when the Admin's password is changed.

Fix: *When the login password for an admin user is updated after scheduling API-based Import/Export job(s) (MBR, PPY, MMSEA,1099 and PUS) then it is recommended that the job(s) be edited and rescheduled to avoid encountering credentials authentication failure messages in the job console logs.*

Issue: The console log displays a network error message when a job runs continuously for 10 min or more.

Fix: *Navigate to the appsettings.json file of Claim Scheduler and Claims API and search for the key "**HttpClientTimeOut**" and change its value from default to 30 or 45 or 60 as needed.*

Issue: The Export Job log displays an SSL connection error.

Fix: *Check the values for the following 2 keys in the Claims API AppSetting.json:*

*"**ResourceAPIBaseUrl**": "http://localhost/claimsapi/",*

*"**SettingsAPIBaseUrl**": "http://localhost/claimsapi/",*

Ensure that the following keys should have the same value as that for the above keys:

*"**RiskmasterAPI**": "http://localhost/riskmasterapi/",*

*"**SearchAPI**": "http://localhost/claimsapi/",*

*"**DataAnalyticsAPI**": "http://localhost/claimsapi/",*

Check the values for the following 3 keys in the Claim Scheduler AppSetting.json

"**SearchAPI**": "http://localhost/claimsapi",

"**RiskmasterAPI**": "http://localhost/RiskmasterAPI",

"**ImportToolAPI**": "http://localhost/claimsapi",

The following keys should have the same value as that for the above keys:

"**DataAnalyticsAPI**": "http://localhost/claimsapi",

"**AssureClaimsFileUploadAPI**": "http://localhost/claimsapi",

If the issue persists, please contact the DXC Assure Claims Support Helpdesk for assistance.

Issue: Validation Errors are displayed for Import File name format.

Fix: *With the release of DXC Assure Claims v.24.2 onwards, file name format for API-based Import Tool jobs will be "filename.extension", whilst earlier, we were expecting file name without extension.*

This change will have no impact on the prescheduled jobs, but all new jobs will require the full file name to be provided while scheduling the Import Tool jobs.

A help icon on the file name control is also added on the job screen to avoid any confusion.
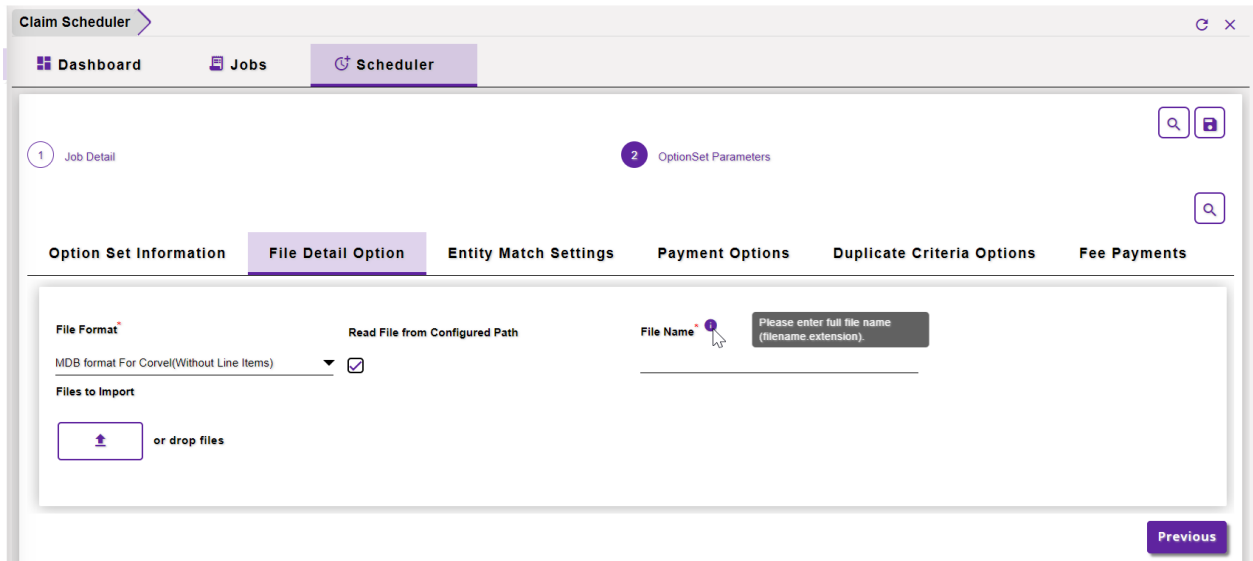
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