



# **Texas Medicaid & Healthcare Partnership**

## **Vision21 User Upload Portal & Mapping Tables**

### **How-To Guide**



---

## TABLE OF CONTENTS

<b>1.0</b>	<b>DOCUMENT OVERVIEW .....</b>	<b>3</b>
<b>2.0</b>	<b>GETTING STARTED.....</b>	<b>3</b>
<b>2.1</b>	<b>Internet Explorer Settings .....</b>	<b>3</b>
<b>3.0</b>	<b>VISION21 USER UPLOAD PORTAL .....</b>	<b>4</b>
<b>3.1</b>	<b>Vision21 User Upload Portal – Login .....</b>	<b>4</b>
<b>3.2</b>	<b>Vision21 User Upload Portal – Home Page.....</b>	<b>5</b>
<b>3.3</b>	<b>Vision21 User Upload Portal – File Upload Page .....</b>	<b>6</b>
<b>3.4</b>	<b>Vision21 User Upload Portal – Summary Page .....</b>	<b>9</b>
<b>3.5</b>	<b>Vision21 User Upload Portal – Invalid Format Error Message.....</b>	<b>8</b>
<b>3.6</b>	<b>Vision21 Portal – Upload Summary Page .....</b>	<b>8</b>
<b>4.0</b>	<b>BusinessObjects .....</b>	<b>10</b>
<b>4.1</b>	<b>Log into BusinessObjects.....</b>	<b>10</b>
<b>5.0</b>	<b>APPENDIX.....</b>	<b>13</b>
<b>5.1</b>	<b>Appendix A – Object Validation Format Template .....</b>	<b>13</b>
<b>5.2</b>	<b>Appendix B – Portal and BusinessObjects Rules.....</b>	<b>19</b>
<b>5.3</b>	<b>Appendix C - Frequently Asked Questions .....</b>	<b>21</b>

## 1.0 Document Overview

This guide will provide step by step directions for BusinessObjects users on how to use the portal interface to upload files. The uploaded data can be found under the Mapped Table Objects Class found in the following Universes: AHQP Claims, AHQP Vendor Drug, CMS, Combined, Enc\_Best Picture, Enc\_Full Picture, Enc Member, and Enc Provider Universes.

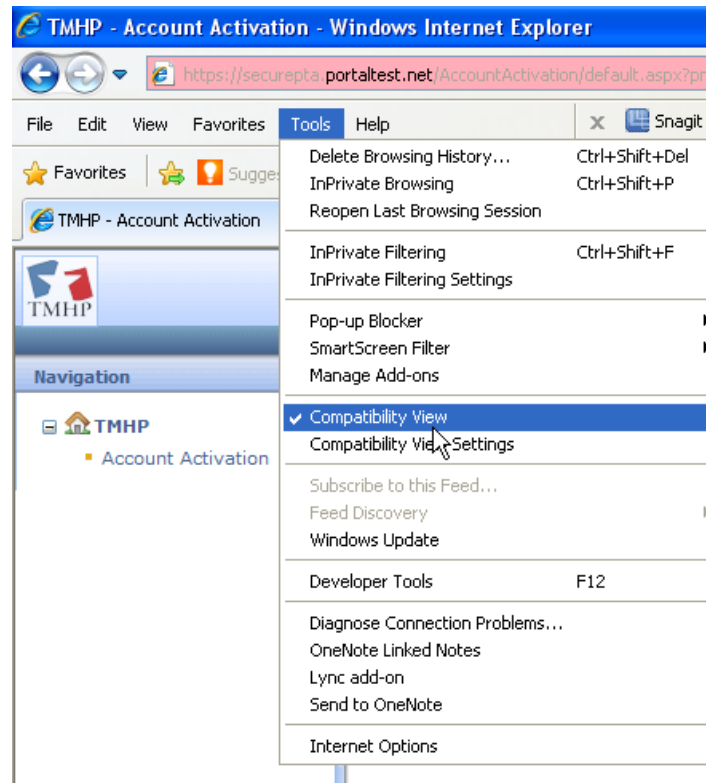
\*Please ensure you have access to BusinessObjects and VPN access before starting this process

## 2.0 Getting Started

Before you get started, there a few steps users will need to take to ensure their computer is set up to work efficiently with the new Vision21 User Upload Portal and BusinessObjects functionalities.

### 2.1 Internet Explorer Settings

If you are running Internet Explorer (IE Version 8.0 or higher), please make sure that your Internet Explorer setting for “Compatiblity View” under the Tools drop down list is checked. See screen shot below.



### 3.0 Vision21 User Upload Portal

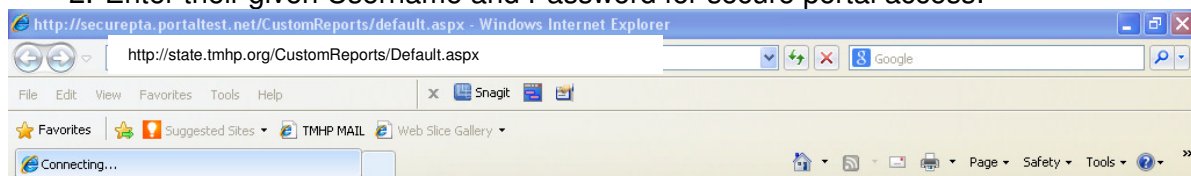
Users will log into the Vision21 User Upload Portal site to upload their file. They will choose their desired Universe and object. The file will have to pass the validation process that will verify that the objects are the correct data length and format before sending it to Vision21 database.

#### 3.1 Vision21 User Upload Portal – Login

1. Users will click on the following hyperlink to access the Vision21 User Upload Portal:

- a. TMHP Users: <http://operations.tmhp.net/CustomReports/Default.aspx>
- b. State Users: <http://state.tmhp.org/CustomReports/Default.aspx>

2. Enter their given Username and Password for secure portal access:



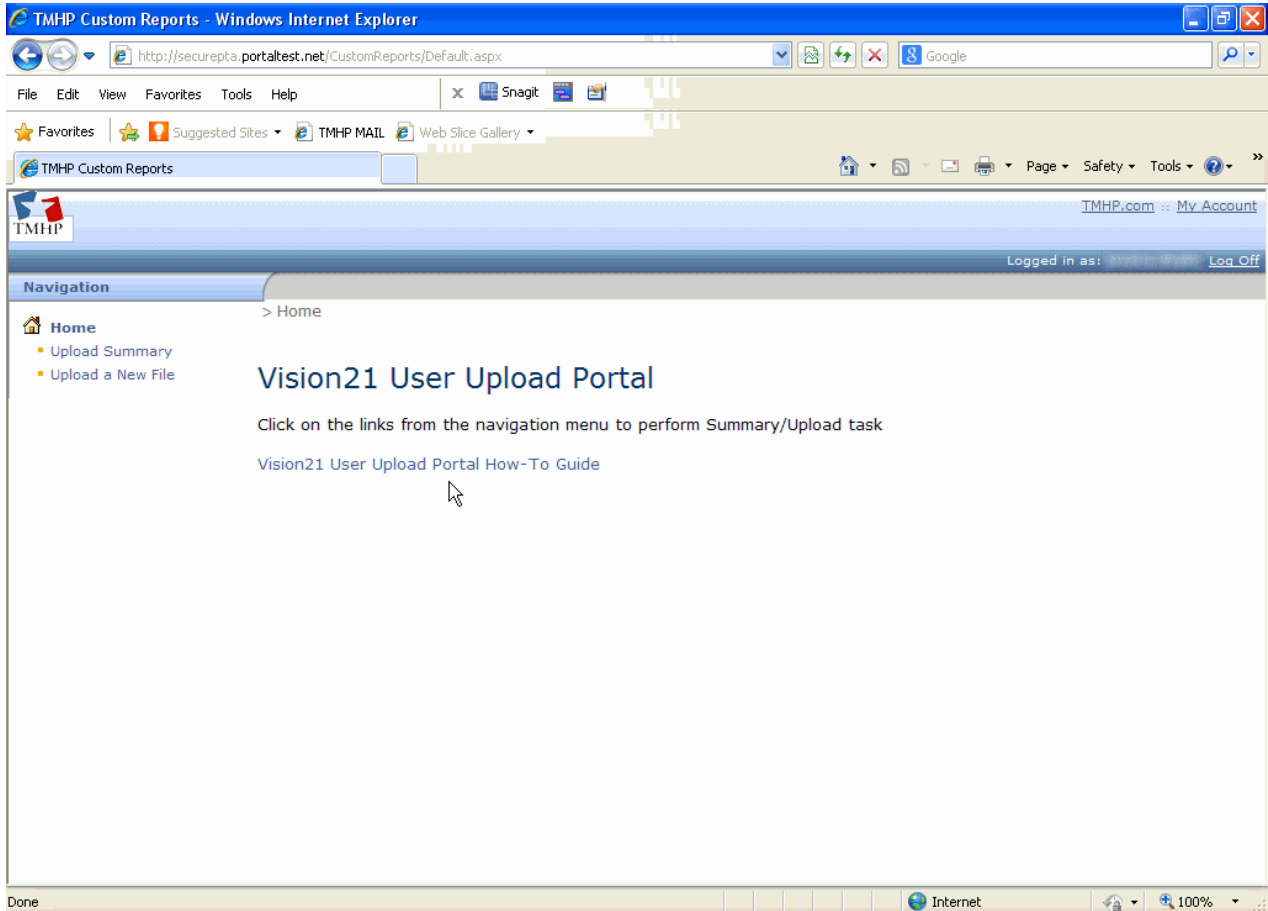
Enter your TMHP VPN Username and Password (ex: **firstname.lastname.tx@tmhp.org** for state users).

Click the 'OK' button when both fields are populated.



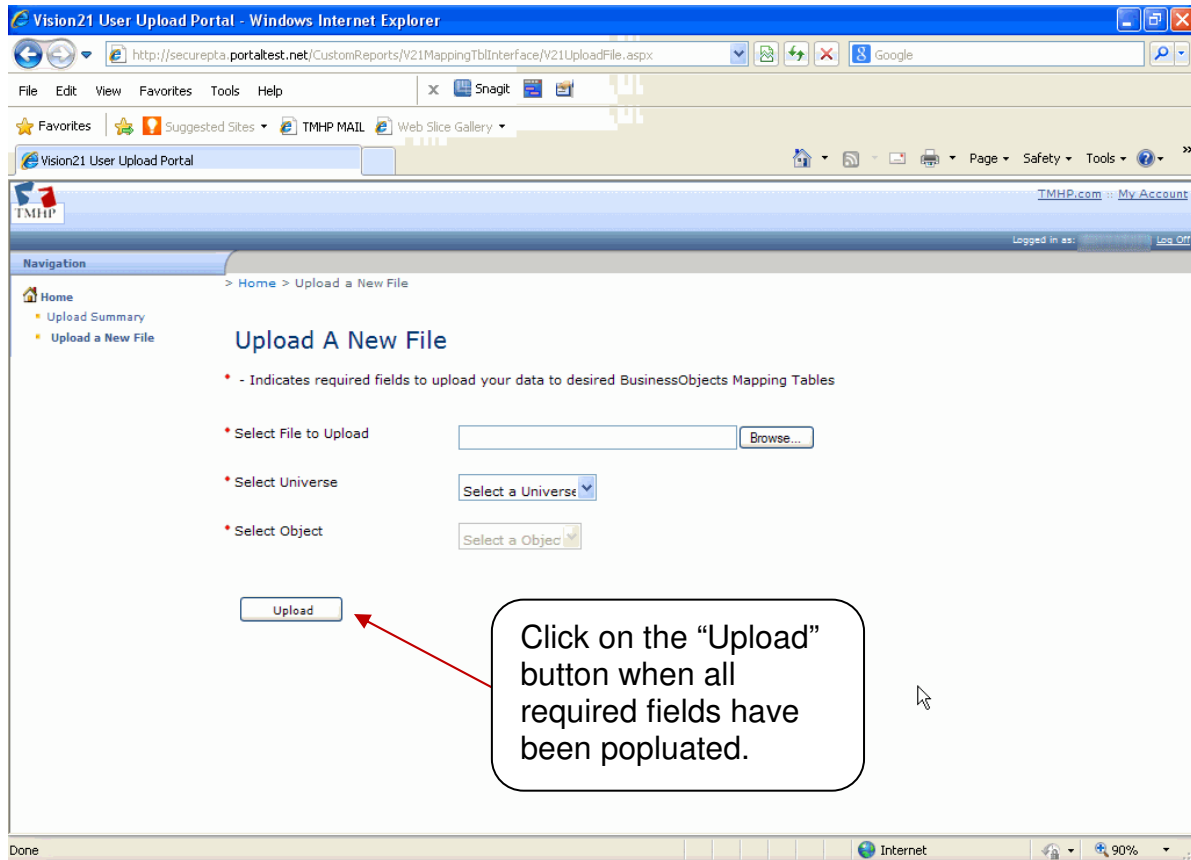
3. Click on the 'OK' button.
4. After a successful login, State users will be directed to the default "Vision21 User Upload Portal" home page.

### 3.2 Vision21 User Upload Portal – Home Page



\*This How-To document is linked on the homepage for reference if needed.

### 3.3 Vision21 User Upload Portal – File Upload Page



#### **Instructions to Upload a file:**

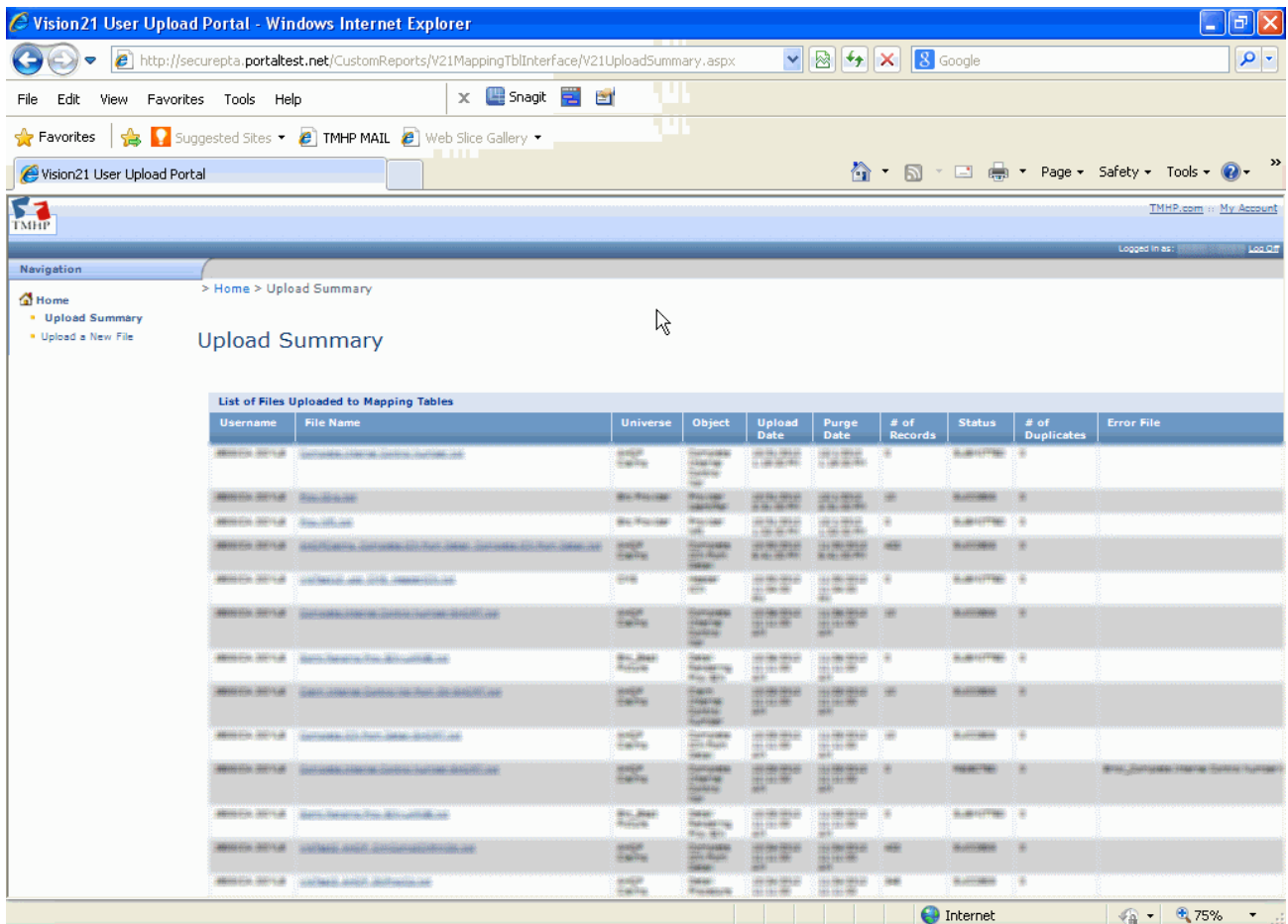
1. For “Select File to Upload” field, click on the “Browse” button to choose a file to upload from your local machine.
2. Click on the “Select Universe” drop down list to choose the desired Universe.
3. Click on the “Select Object” drop down list to choose the desired object in the applicable Universe. (Objects in the drop down list will list only the applicable objects from the selected Universe.)
4. Click on the “Upload” button when all fields have been populated.

**NOTE:** Valid character type, data type, and row restrictions will be verified. For reference, see Appendix A for each valid object formats.

### 3.4 Vision21 User Upload Portal – Summary Page

After clicking the “Upload” button on the Upload a New File Page, users will be navigated to their Upload Summary Page where they can view their personal upload summary table.

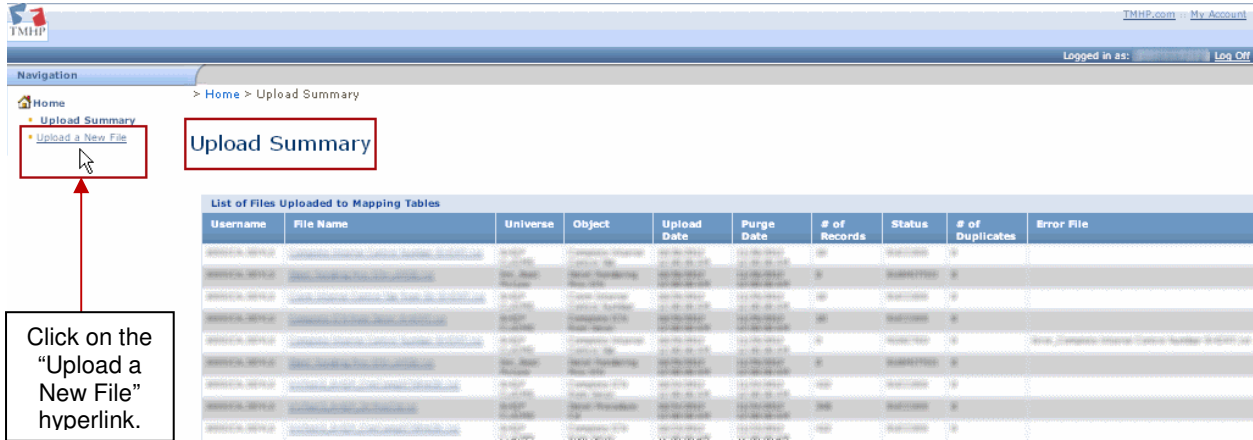
Here is a screenshot of a sample upload summary table displayed on the Upload Summary Page:



The screenshot shows a web browser window displaying the "Upload Summary" page. The page title is "Upload Summary" and it includes a navigation menu with "Home", "Upload Summary", and "Upload a New File". The main content area features a table titled "List of Files Uploaded to Mapping Tables".

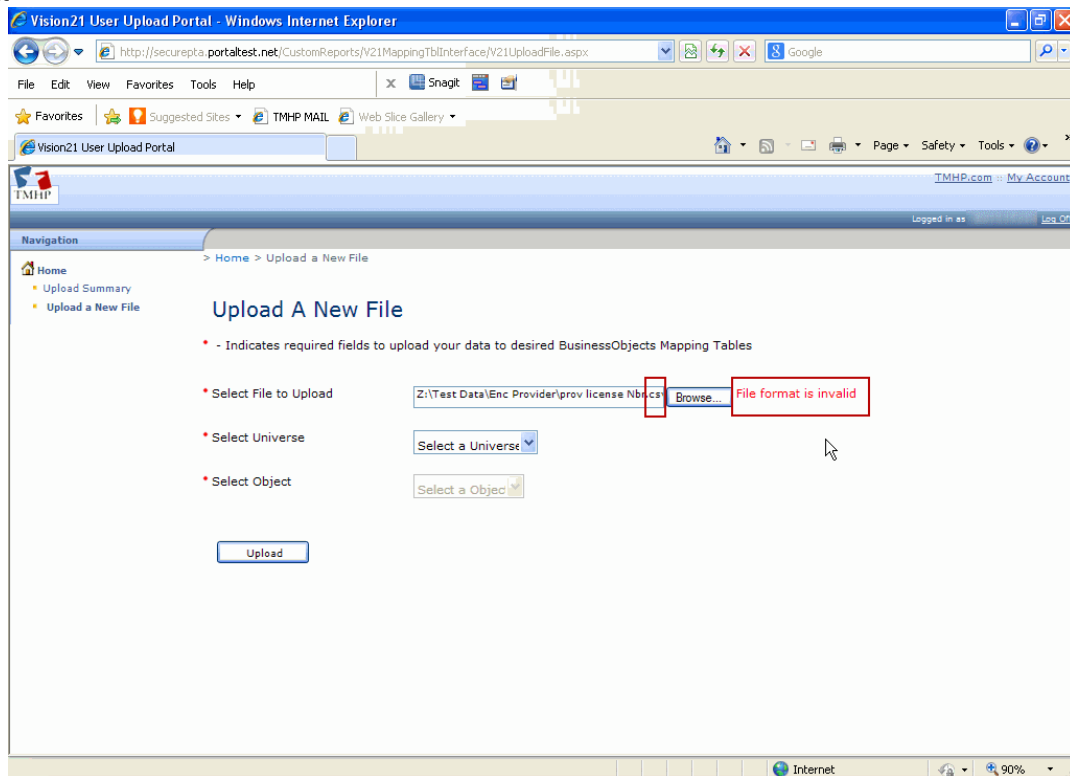
Username	File Name	Universe	Object	Upload Date	Purge Date	# of Records	Status	# of Duplicates	Error File
VISION21-18	.../.../...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	486	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	1	SUCCESS	0	...
VISION21-18	...	...	...	...	...	1	SUCCESS	0	
VISION21-18	...	...	...	...	...	486	SUCCESS	0	
VISION21-18	...	...	...	...	...	486	SUCCESS	0	

Users can click on the “Upload a New File” hyperlink to upload another file.



### 3.5 Vision21 User Upload Portal – Invalid Format Error Message

This screenshot shows an error message a user will receive if they upload an invalid file format.

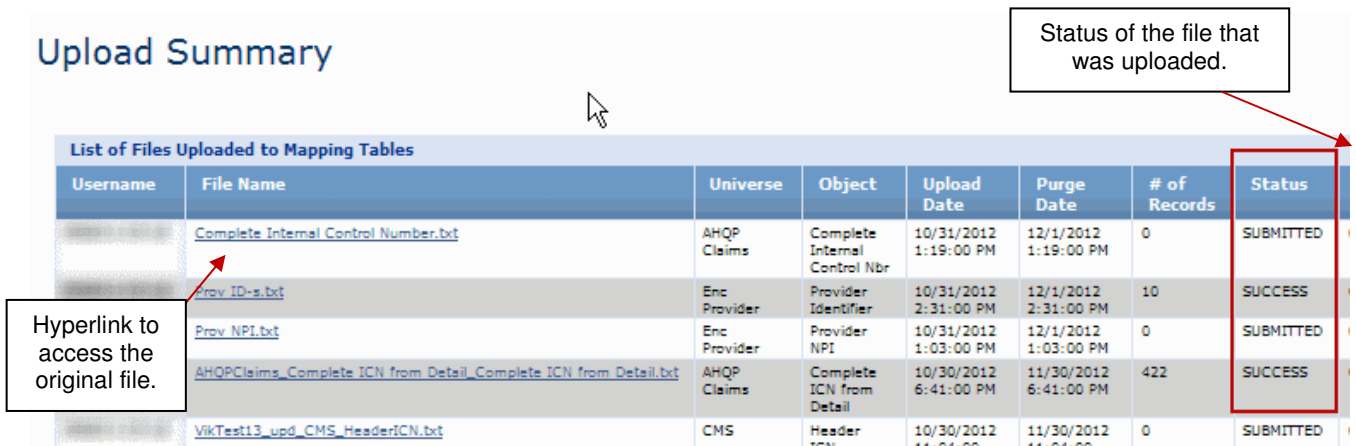


**NOTE: Only Text file types (.txt) are accepted.**



### 3.6 Vision21 Portal – Upload Summary Page

After users have successfully submitted their file, they will be redirected to the “Upload Summary Page” and their status of that file provided will be displayed. The file will be saved and can be accessed through the hyperlink. The hyperlink will be available to the user for the 30 calendar days after uploaded. After the 30 days, the hyperlink and row will be removed.



**Upload Summary**

Status of the file that was uploaded.

Hyperlink to access the original file.

List of Files Uploaded to Mapping Tables							
Username	File Name	Universe	Object	Upload Date	Purge Date	# of Records	Status
	<a href="#">Complete Internal Control Number.txt</a>	AHQ Claims	Complete Internal Control Nbr	10/31/2012 1:19:00 PM	12/1/2012 1:19:00 PM	0	SUBMITTED
	<a href="#">Prov ID-s.txt</a>	Enc Provider	Provider Identifier	10/31/2012 2:31:00 PM	12/1/2012 2:31:00 PM	10	SUCCESS
	<a href="#">Prov NPI.txt</a>	Enc Provider	Provider NPI	10/31/2012 1:03:00 PM	12/1/2012 1:03:00 PM	0	SUBMITTED
	<a href="#">AHQClaims_Complete ICN from Detail_Complete ICN from Detail.txt</a>	AHQ Claims	Complete ICN from Detail	10/30/2012 6:41:00 PM	11/30/2012 6:41:00 PM	422	SUCCESS
	<a href="#">VikTest13_upd_CMS_HeaderICN.txt</a>	CMS	Header ICN	10/30/2012 11-04-00	11/30/2012 11-04-00	0	SUBMITTED

Tool tips for each status can be found by hovering over each status indicator.

#### Status Column Indicators:

- Submitted: Data has been saved
- Accepted: Data has been verified
- Pending: Data has been sent to Vision21
  - There will be a two hour time limit for the file to upload once the user submits the file on the portal. After that time has expired, an alert message will be sent to the on-call to look at the file to see if there is an issue.
- Success: Data can be accessed in BusinessObjects
- Duplicate: There are rows that are duplicated in the file (Files were uploaded successfully. Duplicated rows were not written in Vision21)
- Failed: Data was not uploaded to Vision21
- Rejected: Data has an invalid format

**NOTE:** Please call DSS On-Call if you are having issues with uploaded files or accessing them through BusinessObjects.

**NOTE:** Files uploaded during weekend hours will not be accessible in BusinessObjects until Monday.

## 4.0 BusinessObjects – Map Table Objects

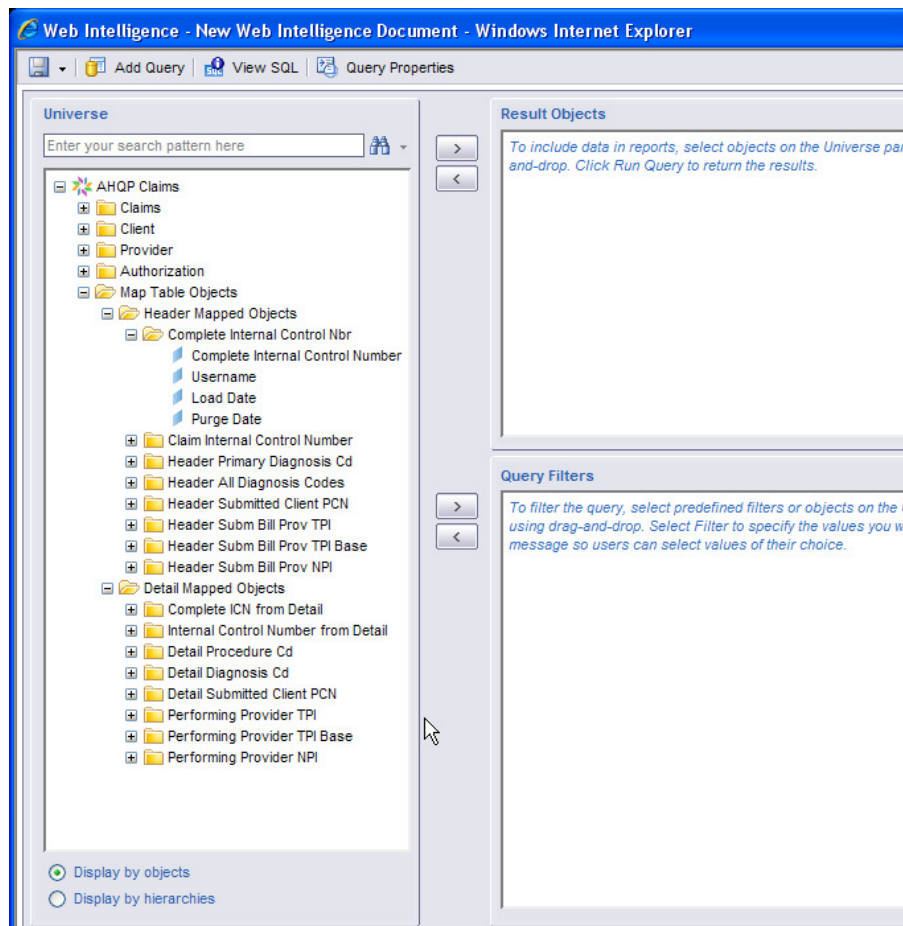
If the file shows a “Duplicate” or Success” status in the Upload Summary Table, a mapping table has been created on Vision21 and accessible through BusinessObjects. The user can log into BusinessObjects and selects the Universe they would like to query from.

### 4.1 Log into BusinessObjects

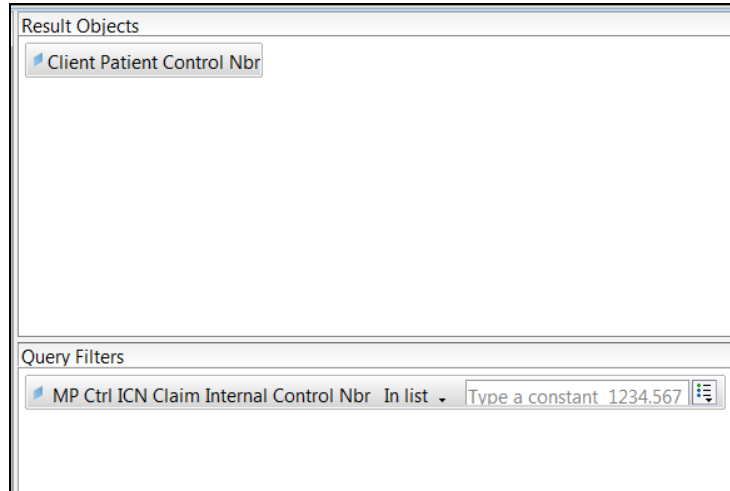
1. Users will enter their username and password to access BusinessObjects.
2. Select the Universe where the file was uploaded.

**NOTE:** The “Map Table Objects” Class is visible as the last class in each Universe.

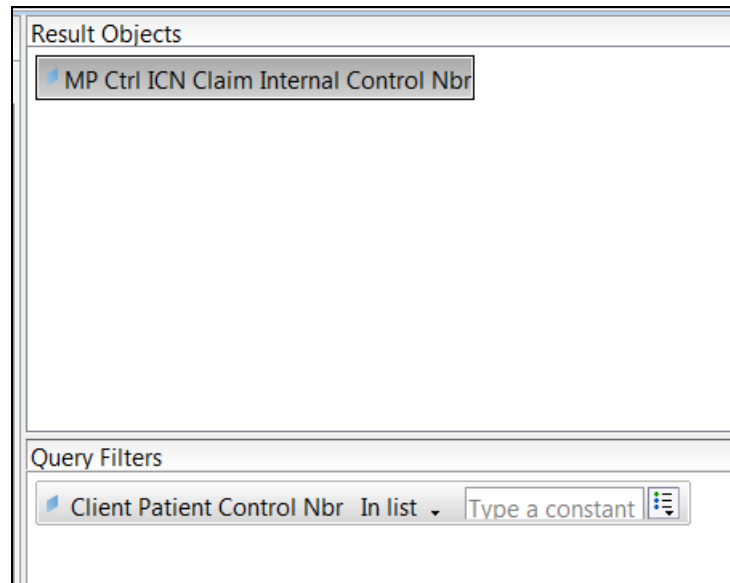
**NOTE:** Users may run regular queries without the mapped objects like normal.



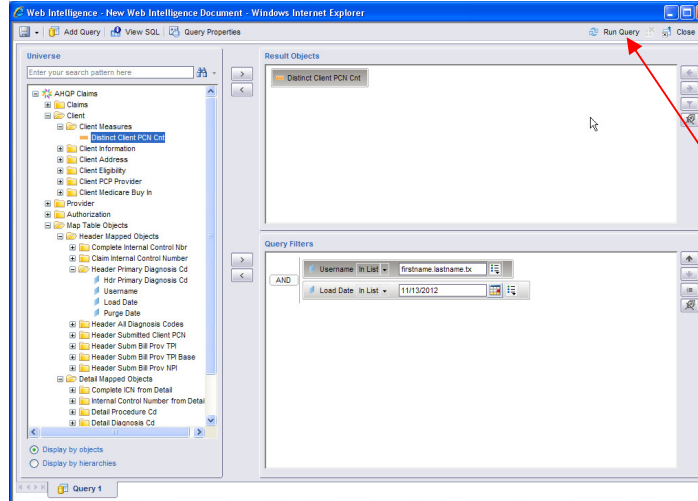
3. Drag the main object into the Result Objects window...



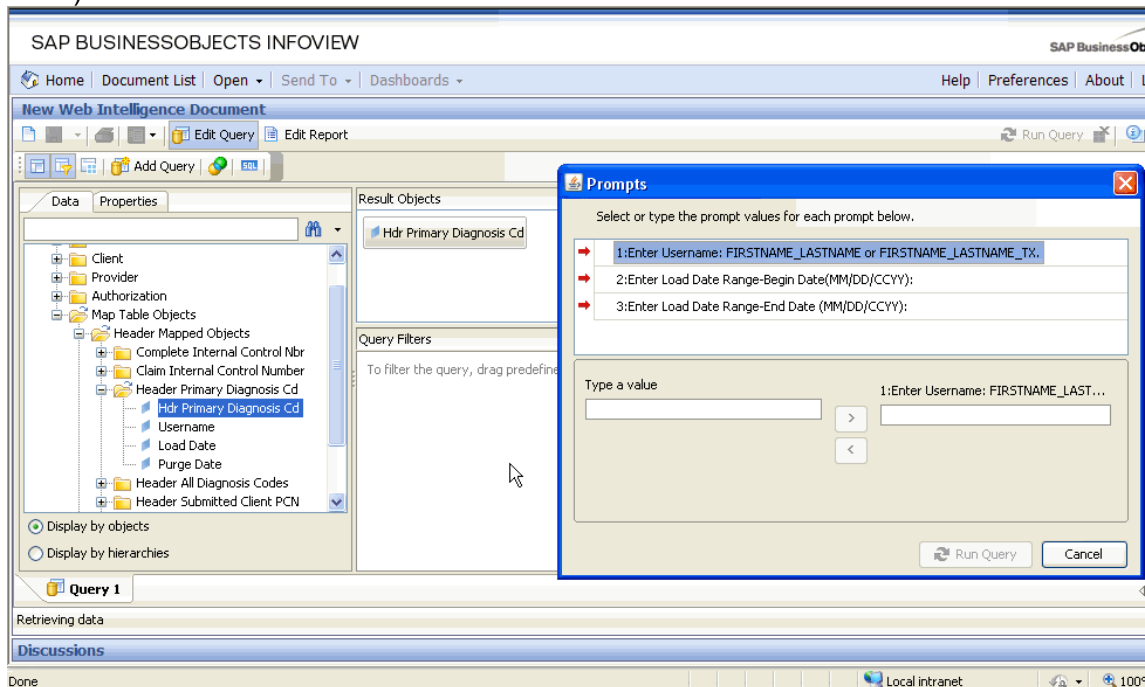
Or Query Filters window.



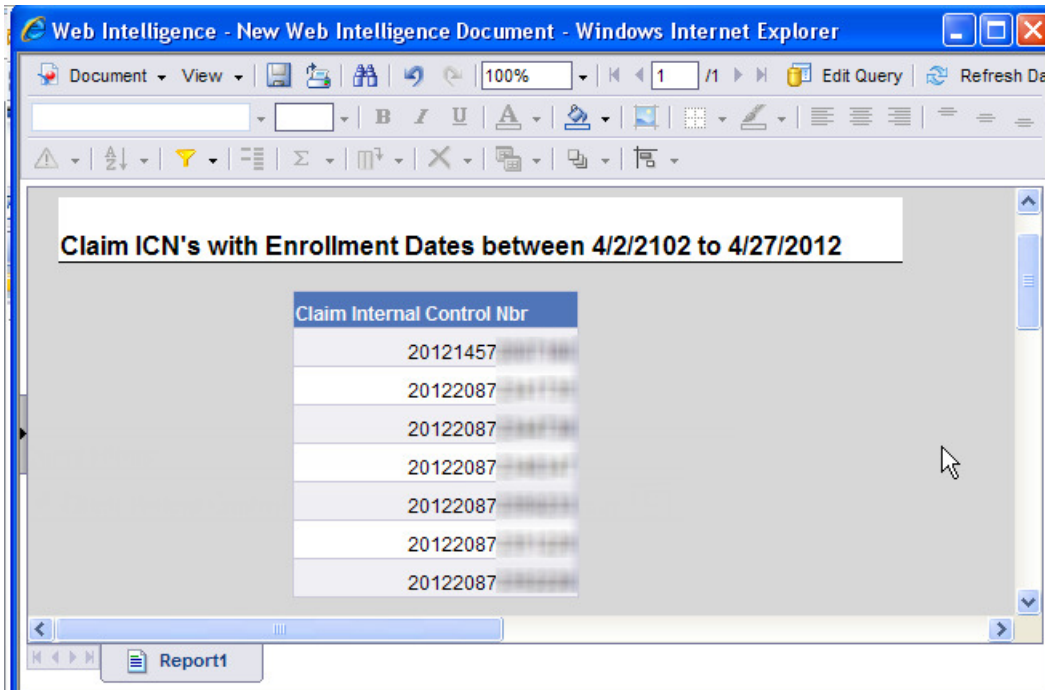
#### 4. Run Query



5. Users will be prompted for the for the Username and Load Date. (The prompt only allows one Username to be entered into the field.)



6. Users can see their results using the query with the Map Table Objects.





## 5.0 APPENDIX

### 5.1 Appendix A – Object Validation Format Template

#### AHQP Claims Universe

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi-part/tab separated ?
Claim Internal Control Number	Claim Internal Control Nbr	Numeric	Fixed	15	15		
Claim Internal Control Number (Header and Detail)	Claim Internal Control Nbr	Numeric	Fixed	15	15		
Complete ICN (Header and Detail)	Claim Internal Control Nbr	Numeric	Fixed	24	24		
Complete ICN from Detail	Complete ICN from Detail	Numeric	Fixed	24	24	Concatenated	No
Complete Internal Control Nbr	Complete Internal Control Number	Numeric	Fixed	24	24	Concatenated	No
Detail Diagnosis Cd	Dtl Diagnosis Cd	Char	Variable	6	1		
Detail Procedure Cd	Procedure Cd	Char	Variable	6	1		
Detail Submitted Client PCN	Dtl Submitted Client PCN Nbr	Char	Fixed	9	9		
Header All Diagnosis Codes	Hdr ALL Diagnoses Cd	Char	Variable	6	1		
Header Primary Diagnosis Cd	Hdr Primary Diagnosis Cd	Char	Variable	6	1		
Header Subm Bill Prov NPI	Subm Bill Prov NPI	Char	Fixed	10	10		
Header Subm Bill Prov TPI	Subm Bill Prov Id Nbr with Suffix	Char	Fixed	9	9	Concatenated	No
Header Subm Bill Prov TPI Base	Subm Bill Prov Identifier Nbr	Char	Fixed	7	7		
Header Submitted Client PCN	Submitted Client PCN Nbr	Char	Fixed	9	9		
Internal Control Number from Detail	Claim Internal Control Nbr from Dtl	Numeric	Fixed	15	15		
PCN (Header and Detail)	Header Submitted Client PCN/ Detail Submitted Client PCN	Char	Fixed	9	9		
Performing Provider NPI	Submitted Perf Prov NPI	Char	Fixed	10	10		
Performing Provider TPI	Sub Perf Prov Id Nbr with Suffix	Char	Fixed	9	9	Concatenated	No
Performing Provider TPI Base	Submitted Perf Prov Identifier Nbr	Char	Fixed	7	7		



**AHQP Vendor Drug**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi-part/tab separated ?
Submitted PCN Number	MP Submitted PCN Number Sbmt PCN Nbr	Char	Fixed	9	9		
Submitted NDC	MP Sbmt NDC	Char	Variable	19	1		
Submitted Prescriber NPI	MP Sbmt Presc NPI	Char	Fixed	10	1		
Submitted Pharmacy NPI	MP Sbmt Pharm NPI	Char	Fixed	10	10		

**CMS Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi-part/tab separated?
Header Contract/Prov Nbr	Claim Hdr Provider Nbr	Numeric	Variable	9	1		
Header Contract/Prov NPI	NPI	Char	Fixed	10	1		
Header ICN	ICN	Numeric	Fixed	15	15		
Header Submitted Client Nbr	Claim Hdr Client/Medicaid Nbr	Numeric	Variable	9	1		

**Enc Provider Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi-part/tab separated ?
Provider ID and Suffix	Prov ID/Suffix	Char	Variable	18,2	1		Yes
Provider Identifier	Prov ID	Char	Variable	18	1		
Provider License Number	Prov License Nbr	Char	Variable	10	1		
Provider NPI	Prov NPI	Char	Variable	10	1		



**Enc Best Picture Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi- part/tab separated?
Complete Encounter ICN Key	Sbmt MCO Plan Code, MCO Seq Nbr, MCO ICN, 837 Transaction Code	Char	Variable	2,4,30,1	1		Yes
Complete MCO ICN	Complete MCO ICN	Char	Variable	4,30	1		Yes
Detail Diagnosis 1 Cd	Detail 1st Diagnosis Cd	Char	Variable	10	1		
Detail Procedure Cd	Detail Proc Cd	Char	Variable	10	1		
Detail Rendering Prov EIN	Sbmt Rendrng Prov EIN	Char	Variable	20	1		
Detail Rendering Prov Taxonomy Code	Sbmt Rend Prv Taxonomy Cd	Char	Variable	10	1		
Detail Rendering Provider ID	Rendering Prov ID	Char	Variable	18	1		
Detail Rendering Provider ID and Suffix	Rendering Prov ID, Rendering Prov Suffix	Char	Variable	18,2	1		Yes
Detail Rendering Provider NPI	Sbmt Rendrng Prov NPI	Char	Variable	10	1		
Header Admit Diagnosis	Admitting Diagnosis Cd	Char	Variable	10	1		
Header Billing Prov EIN	Sbmt Billing Prov EIN	Char	Variable	20	1		
Header Billing Prov NPI	Sbmt Billing Prov NPI	Char	Variable	10	1		
Header Billing Prov Taxonomy Code	Sbmt Billing Prov Taxonomy Cd	Char	Variable	10	1	May include spaces	
Header Billing Provider ID	Billing Prov ID	Char	Variable	18	1		
Header Billing Provider ID and Suffix	Billing Prov ID, Billing Prov Suffix	Char	Variable	18,2	1		Yes
Header Member ID	Sbmt Member Primary Ident Nbr	Char	Variable	10	1		
Header Primary Diagnosis	Principal Diagnosis Cd	Char	Variable	10	1		
Header ICN Key (contains 4 objects)							
National Drug Code	National Drug Cd	Char	Variable	19	1		
Prescribing Provider NPI	Sbmt Prescribing Provider NPI	Char	Variable	10	1		





**Enc Full Picture Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi- part/tab separated?
Complete Encounter ICN Key	Sbmt MCO Plan Code MCO Seq Nbr MCO ICN 837 Transaction Code	Char	Variable	2,4,30,1	1	H	Yes
Detail Line Revenue Code	Dtl Revenue Cd	Char	Variable	10	1	D	
Complete MCO ICN	MCO Seq Nbr MCO ICN	Char	Variable	4,30	1	H	
Complete Original ICN	Original ICN Seq Nbr Original ICN	Char	Variable	4,30	1	H	
Sbmt Member Primary ID Nbr	Sbmt Mbr Primary ID Nbr	Char	Variable	10	1	H	
Sbmt Billing Provider EIN	Sbmt Billing Prov EIN	Char	Variable	20	1	H	
Sbmt Billing Prov Taxonomy Cd	Sbmt Billing Prov Tax Cd	Char	Variable	10	1	H	
Sbmt Billing Provider NPI	Sbmt Billing Prov NPI	Char	Variable	10	1	H	
Principal Diagnosis Cd	Principal Diagnosis Cd	Char	Variable	10	1	H	
Admitting Diagnosis Cd	Admit Dx Cd	Char	Variable	10	1	H	
National Drug Code	National Drug Cd	Char	Variable	19	1	H	
Detail Procedure Cd	Detail Proc Cd	Char	Variable	10	1	D	
Detail 1st Diagnosis Cd	Detail Diagnosis 1 Cd	Char	Variable	10	1	D	
Sbmt Rendering Provider NPI	Sbmt Rendrng Prov NPI	Char	Variable	10	1	D	
Sbmt Rendering Prov EIN	Sbmt Rendrng Prov EIN	Char	Variable	20	1	D	
Sbmt Rend Prov Taxonomy Cd	Sbmt Rend Prov Tax Cd	Char	Variable	10	1	D	
Sbmt Prescribing Provider NPI	Sbmt Presc Prov NPI	Char	Variable	10	1	H	
Billing Provider ID	Billing Prov ID	Char	Variable	18	1	H	
Billing Provider ID and Suffix	Billing Prov ID Billing Prov Suffix	Char	Variable	18,2	1	H	Yes
Rendering Provider ID	Rendering Prov ID	Char	Variable	18	1	D	
Rendering Provider ID and Suffix	Rendering Prov ID Rendering Prov Suffix	Char	Variable	18,2	1	D	Yes



**Enc Member Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min Default will be 1 unless it is a fixed length	Misc	Multi-part/tab separated?
Member ID	Mbr ID	Char	Variable	10	1		
Member SSN	Member SSN	Char	Fixed	9	9	The unformatted SSN does not have dashes	

**Combined Universe**

BO Class/Portal Name	BO Object	Field Type (Numeric Fields will be validated)	Variable or Fixed Length	Max	Min (Default will be 1 unless it is a fixed length)	Misc	Multi-part/tab separated ?
Header Key	MP Enc ICN Key	Char	Variable	2,4,30,1	1	H	Yes
Plan Code / Current ICN Sequence Number	MP Enc Partial ICN	Char	Variable	2,4,30	1	H	Yes
Complete MCO ICN	MP MCO ICN	Char	Variable	4,30	1	H	Yes
Header Complete ICN	MP Mcaid Com ICN	Num	Fixed	3,3,3,15	24	H	No
15 digit ICN	MP Header ICN	Char	Variable	30	1	H	
Header Billing Provider TPI Base	MP Bill Prov ID	Char	Variable	18	1	H	
Header Billing Provider TPI and Suffix	MP Bill Prov ID/Sfx	Char	Variable	18,2	1	H	Yes
Header Billing Provider NPI	MP Bill Prov NPI	Char	Variable	10	1	H	
Header Admit Diagnosis Code	MP Admit Dx	Char	Variable	10	1	H	
National Drug Code	MP NDC	Char	Variable	19	1	H	
Principal Diagnosis Code	MP P Dx	Char	Variable	10	1	H	
Header Principal Procedure Code	MP P Proc	Char	Variable	10	1	H	
Detail Procedure Code	MP Dtl Proc	Char	Variable	10	1	D	
Detail Complete ICN	MP Mcaid Dtl ICN	Num	Fixed	3,3,3,15	24	D	Yes
Detail Diagnosis Code	MP Dtl Dx	Char	Variable	10	1	D	
Render Provider TPI Base	MP Rend Prov	Char	Variable	20	1	D	



Rendering Provider TPI and Suffix	MP Rend Nbr	Char	Variable	10	1	D	
Rendering Provider NPI	MP Rend NPI	Char	Variable	10	1	D	
Submitted Member Primary Identifier Number	MP Sbmt Mbr Primary ID Nbr	Char	Variable	10	1	H	
Submitted Prescribing Provider NPI	MP Pres NPI	Char	Variable	10	1	H	

**Non-Mapped Object added**

Distinct PCN count	N/A	Aggregation Sum	N/A				N/A
--------------------	-----	-----------------	-----	--	--	--	-----



## **5.2 Appendix B – Portal and BusinessObjects Rules**

- Only text files will be accepted and uploaded.
- Files uploaded to the Vision21 User Upload Portal must not contain a column header.
- Files uploaded to the Vision21 User Upload Portal must only contain data for one object.
- Make sure that all data uploaded on the Vision21 User Upload Portal has no duplications. This will be very important when querying from data uploaded over multiple days. (The portal validation process will not write the duplicated data. Users will see a “DUPLICATE” status in the column as well as # of Duplicates. Users may query across multiple days [i.e. range of Load Date]. However, duplicates between two or more uploaded files may occur and will not be removed in this process.
- It is discouraged to use the main Mapped Table object in the “Query Filters” window and entering values to further filter the uploaded data. Please use Mapped Table objects as an uploaded filter.
- Users should always use the Username and Load Date object for each Mapped Table Object and enter values in the “Query Filter” window as a best practice.
- Users shouldn’t use the same Mapping Table object or it’s associated objects twice in the “Query Filters” window.
- Users cannot drag the Username, Load Date, and Purge Date objects into the “Results Objects” field.
- Users can drag the main Mapped Table object into the “Results Objects” field.
- If the main Mapped Table object (ex: Hdr Diagn Cd) is used in the “Query Filters” window, the user will be prompted to enter values for Username and Load Date before executing the query.
- The following objects will not be enabled for use in the “Query Filters”:
  - AHQP
    - Complete Internal Control Number
    - Subm Bill Prov Id Nbr with Suffix
    - Complete ICN from Detail
    - Sub Perf Prov Id Nbr with Suffix
  - ENC Best Picture
    - Complete MCO ICN
  - Enc Provider
    - Prov ID/Suffix
- If you have uploaded files during weekend hours, the files will be only accessible on Monday morning when BusinessObjects is once again available.
- For multi-part objects, each object should be tab separated. For example:
  - Detail Rendering Provider ID and Suffix Object in Enc\_Best Picture would show in a text file as:           123456789           01



- Users are restricted to uploading files up to 500,000 rows. Any file that exceeds this limit will be rejected during the portal upload process and will show a status in the column as “REJECTED”
- Users are restricted to uploading 1 file per user, per Universe, per object, per day. (For example: User firstname.lastname.tx can only upload 1 successful file for AHQP Claims / Complete ICN from Detail on 11/19/2012. That user will need to wait to upload another file for that Universe and object the following day.)
- Combined Universe will include prompts for all Mapped Table objects. This prompt will require users to enter their Username and Load Date values to retrieve the query results. This prompt only allows one Username to be entered into the field.

---

### **5.3 Appendix C – Frequently Asked Questions**

- Who should I call to help with issues uploading a file on the Vision21 User Upload Portal or accessing the data in BusinessObjects?
  - Please call the DSS On-Call for these issues. If has been more than 2 hours for your file to upload, a message has already been sent to the DSS on-call to look into the possible issue.
- How many files can I upload per day?
  - Users are limited to 1 successful uploaded file per user per 1 day per each individual object within (Ex: User firstname.lastname.tx can only upload 1 successful file for AHQP Claims / Complete ICN from Detail on 11/19/2012. That user will need to wait to upload another file for that Universe and object the following day.)
- Can I upload another file if the status for that file says rejected?
  - Yes. Users are only restricted to 1 file per day, per Universe, per Object when the status is "SUCCESS".
- Why can't I log into the secure Vision21 User Upload Portal?
  - Please make sure you have access to this function and have been given a username and password to log in. If the issue still persists, please contact the DSS On-Call and they can help make sure your information and permissions are correct.
- When may I begin running queries in BusinessObjects using data from the files I have uploaded?
  - Files must be in Successful status before they can be used in queries.