The purpose of this functionality is to allow states to load a complaint intakes backlog with a Triage status into ACTS which have been recorded somewhere else and not manually entered into ACTS.

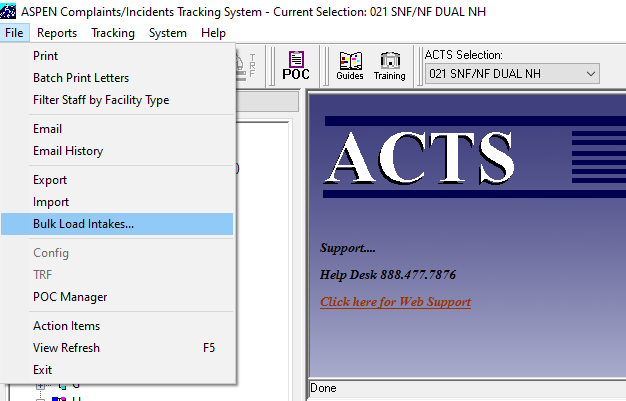
To do so, the state will need to provide a Comma Separated Values (.CSV) file with the intake data they want to load into ACTS.

It is important that the .CSV file be in the provided format and contain appropriately formatted data.

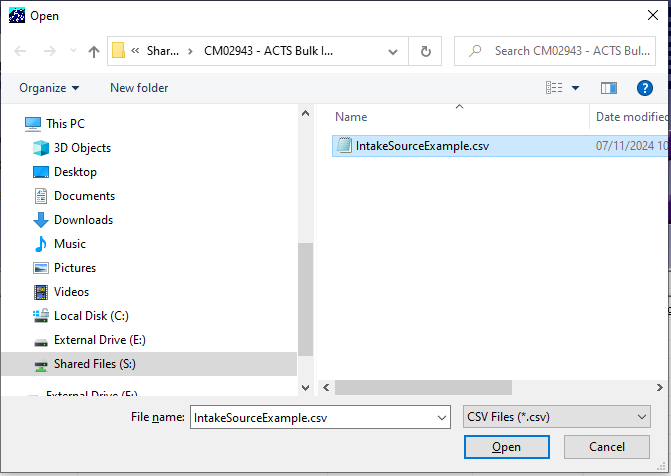
See below for .CSV file field definitions. You may also use the provided IntakeSourceExample.CSV as an example.

To import the intakes into ACTS using the .CSV file

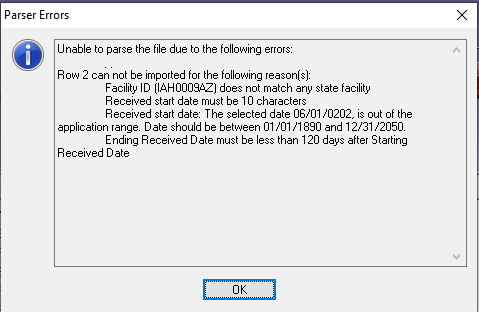
1. Open ACTS
2. Select the File – Bulk Load Intakes… menu option



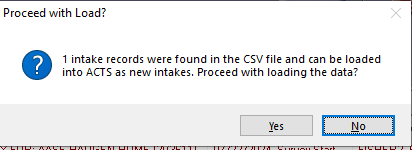
1. Navigate to and select the .CSV file to import



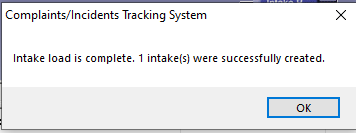
1. The Intake Import Function will analyze the selected .CSV file and report any issues to the user to correct before the import can proceed.
   1. Correct the issues and restart the Import
   2. Example of issues with the data



1. Once all issues are corrected in the source .CSV file, ACTS will ask for confirmation to continue the import



1. Pressing No will cancel the import
2. Pressing Yes will import the intakes
3. When import processing is complete, the following screen will display



.CSV file Field Definitions:

The .CSV file should contain the following information, in the following order.

|  |  |  |
| --- | --- | --- |
| Facility ID or CCN | Text – max length of 16 | Required – this should correspond to the ASPEN FacilityID or CCN of the provider. The data should be the FacilityID or the CCN – not both |
| Intake Type | Text – length of 2 | Required  Value of **01** for Complaint Value of **02** for Entity Reported Incident |
| Intake Subtype | Text – length of 1 | Required  For Intake Type 01 – Complaint  **A** - Federal COPs, CFCs, RFPs, EMTALA, CLIA  **B** - State-only, licensure  **C** - No State or Federal provider compliance issue  For Intake Type 02 – Entity Reported Incident  **1** - Federally-required, entity-reported  **2** - State-req, potential Fed noncompl, entity-reported  **3** - State-required, all other, entity-reported  **4** - Reported by other agencies  **5** - None of the above |
| Received Start Date | Date | Optional – format = mm/dd/yyyy  Example: 07/01/2024 |
| Received Start Time | Text – length of 8 | Optional – format = military time  Example: 13:04 |
| Received End Date | Date | Required – format = mm/dd/yyyy  Example: 07/01/2024 |
| Received End Time | Text – length of 8 | Required – format = military time  Example: 13:04 |
| Alleged Event Date | Date | Optional – format = mm/dd/yyyy  Example: 07/01/2024 |
| Alleged Event Time | Text – length of 8 | Optional – format = military time  Example: 13:04 |
| Source | Text – length of 2 | Optional  **01** - Resident/Patient/Client  **02** - Entity Self-Reported – must be selected if Intake Type is Entity Reported Incident  **03** - Current Staff  **04** - Former Staff  **05** - Anonymous  **06** - Family  **07** - Friend  **08** - Ombudsman  **09** - State Survey Agency  **10** - Other State Agency  **11** - CMS  **12** - Medicare Intermediary/Carrier  **13** - Other Health Provider  **14** - Quality Improvement Organization  **15** - Physician  **16** - Coroner  **17** - Congressional Inquiry  **18** - Media  **19** - Other  **20** - Accreditation Organization  **21** - PT Organization  **22** - FDA  **23** - ESRD Network  **24** - Web Submitted |
| Complainant First Name | Text – length of 12 | Optional – If complainant information is not provided, then the intake will be marked as Anonymous.  Both the first and last names must be filled in for a complainant to be added. |
| Complainant Last Name | Text – length of 16 |
| Complainant Relationship with Patient | Text – length of 50 |
| Complainant Phone Number | Text – length of 13 |
| Complainant Email Address | Text – length of 75 |
| Patient First Name | Text – length of 12 | Optional |
| Patient Last Name | Text – length of 18 | Optional |
| Patient Admitted Date | Date | Optional – format = mm/dd/yyyy  Example: 07/01/2024 |
| Patient Discharge Date | Date | Optional – format = mm/dd/yyyy  Example: 07/01/2024 |
| Patient Location | Text – length of 120 | Optional |
| Patient Room | Text – length of 6 | Optional |
| Patient Admitting Diagnosis | Text – length of 200 | Optional |
| Is this EMTALA? | Text – length of 1 | Optional  **Y** – Yes  **N** – No  Blank will be treated as No |
| Notes | Text | Optional – free-form text |

**Note:** .CSV files use commas as delimiters between fields. If any of the fields contain a comma as a part of the field value, such as the Notes field, be sure to surround the data in the field with double quotes. An example: The Notes field contains the following text. ***The complainant is concerned with her mother’s nausea, abdominal pain and headaches.*** The .CSV file should be formatted to have double quotes as the following: ***"The complainant is concerned with her mother's nausea, abdominal pain and headaches.".*** You may wish to gather your data in a tool such as Excel and when the data is complete, use Excel’s export function to create the .CSV file. Excel seems to do a good job of handling special characters like commas when exporting to a .CSV format.

The ACTS Intake Bulk Load expects a .CSV file. Excel Files are not supported.