

IWTIF Format Specification

Version 1.27

Overview

The IWTIF is a transaction import specification for Import Wizard that adds transactions and applicable master data to Medisoft (IWTIF stands for Import Wizard Transaction Import Format). This format is basically a multi-segment, comma separated value (CSV) file with each segment representing a Medisoft entity e.g. Patient, CPT, DX, Guarantor. Each segment is identified by a pre-defined tag placed at the beginning of the record.

Import Wizard parses the information made available in the IWTIF format and logs what data was written to Medisoft and what data was rejected by Import Wizard and why.

The IWTIF file allows the storage of multiple patients and multiple patient encounters in a single input file. Each patient encounter begins with a line of comma delimited patient info followed by various lines of information related to that patient encounter all of which are optional. Each line starts with an identifier tag and ends with a CR/LF. The tag names cannot deviate from the standard format, spelling and style.

Terms used

- **Master Data-** data that can exist independently in the database. Thus patient demographics, CPT, ICD, insurance company information, providers, etc are master data. See tags other than TRN below.
- **Transaction Set Data-** data that cannot exist in the database without master information existing first. Thus Case and Charges are Transaction Set Data. See tag TRN below.

Patient Encounter- The “PATIENT:” tag begins a scope for master information import and the “TRN:” tag begins transaction import for the encounter. Thus the first tag in an encounter must be PATIENT: and the last tag (group) must be TRN (if any). Several patient encounters can be included in each import file.

Basic IWTIF schema

The IWTIF is laid out as follows, required lines are marked with an “*” and brackets “<>” are used for explanatory purposes and these are not part of the actual input file:

PATIENT:< patient layout here>*
GUARANTOR:<guarantor layout here if a guarantor is applicable>
PROVIDER:<layout for provider>*
INSURANCE#1:<layout here for primary insurance carrier>
POLICY#1:<Policy number for insurance #1 goes here>,<Group number for insurance #1 goes here>
INSURANCE#2:< layout here for secondary insurance carrier >
POLICY#2:<Policy number for insurance #2 goes here>,<Group number for insurance #2>
DX#1:<layout for one diagnosis code here> *
DX#2:<layout for one diagnosis code here>

DX#3:<layout for one diagnosis code here>
 DX#4:<layout for one diagnosis code here>
 CPT#1:<layout for one procedure code here>*
 CPT#2:<layout for one procedure code here >
 CPT#3:<layout for one procedure code here >
 CPT#4:<layout for one procedure code here >
 CPT#5:<layout for one procedure code here >
 CPT#6:<layout for one procedure code here >
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >*
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >
 TRN:DOS, <one CPT number designation >,UNITS, CHARGE, < DX number designation >

Explanation of the basic elements

DX# - Diagnosis Code employed typically represented by an ICD-9 or ICD-10 code

CPT# - Transaction code used. Typically this would be a CPT-4 code.

TRN:- Tag indicates that all master information pertaining to an encounter is complete and now we will use that information to build relationships representing a transaction.

DOS- Date of Service in either American or ISO date formats “MM/DD/YYYY” or “YYYYMMDD”.

UNITS- Number of units of procedure administered

CHARGE - Amount billed for one unit of the procedure

Explanation of the various segments

Each patient encounter must begin with a “PATIENT:” tag and the “TRN:” tag begins a transaction import for the encounter. Thus the first segment in the file must be PATIENT and TRN tags if used, must be the last tags at the end of an encounter. Multiple encounters can be included per import file. TRN segments can be omitted all together if the intent is to import the master data only. All other segments are optional and can be specified in any order. Specifically, you can omit:

- 1) GUARANTOR Segment
- 2) DX segments
- 3) DX pointers in the TRN segment
- 4) Charge in the TRN segment

The only expectation is that you should not have an INSURANCE #2 without an INSURANCE #1 (above or below). Same goes for CPT and DX, you can’t have a CPT#2 without a CPT#1 or a DX#2 without a DX#1.

The TRN segment layout is as follows:

TRN: DOS, CPT,Units,Charge,Dx#1,Dx#2,Dx#3,Dx#4

(DOS, CPT and Units are required. Everything after this is not. You can use up to 4 DXs but all are optional. Charge is also optional.)

An actual TRN segment would look like:

TRN:8/16/09,1,3,65.00,4,3

The explanation of this transaction segment is “3 units of CPT#1 was performed on 8/16/09 billed at \$65 per unit on diagnosis of DX#4 and DX#3”.

Rules when using the IWTIF:

- 1) The first data element in each line is a pre-defined identifier label *a.k.a* “tag”. It cannot deviate from the standard format, spelling and style and is delimited with a colon.
- 2) Each encounter in the IWTIF is imported as a new case into Medisoft.
- 3) TRN lines always start with the “TRN:” tag, followed by the Date of Service, followed by the number designation representing the CPT code being used for this transaction (i.e. “CPT#1” would be “1”), followed by the number of units for that procedure, followed by the amount billed per unit of CPT (no dollar sign), followed by number designation representing all DX codes that are applicable on that transaction.
- 4) Patients (and other master information) will only be added to the Medisoft DB if they do not currently exist in there. For example if a -patient with a matching SSN already exists in the Medisoft DB then Import Wizard simply uses that Chart# for the encounter.
- 5) If no insurance company is sent in a patient encounter set then cash payment is assumed when building case for that encounter.
- 6) Procedure (CPT) and diagnosis (DX) codes must come over as standard HCPCS CPT or ICD.
- 7) Only one CPT is allowed on each transaction line but up to 4 DX codes are allowed.
- 8) IW can handle more than 6 transactions (or procedures), simply list them in the same style (i.e. CPT#7, CPT #8, etc.). However IW is limited to 4 DX codes per encounter (this is a Medisoft interface limitation).
- 9) Biller must set both the default POS and TOS codes as well as the correct POS and TOS codes on each transaction from within Medisoft. Typically these POS and TOS codes will be set either before importing data or after the first import of a CPT code.
- 10) Import Wizard does not import payment related data (i.e. payments, co-payments, etc.).
- 11) If no description and/or fee is imported for CPT and ICD codes than these must be entered by the biller prior to creating claims in Medisoft. These should be saved to the individual transaction and diagnosis codes
- 12) If no Guarantor is provided in a patient encounter than the Patient is assumed to be the Guarantor.
- 13) DX#1 on any encounter is set to the Primary Diagnosis on the case for that encounter.

IWTIF Format Spec with Data Fields

PATIENT:"Chart","First Name","Last Name","Middle Initial","Address 1","Address 2","City","St","Zip","Work Ph","Ext","Home Ph","SSN","Sex","Marital Status",Date Of Birth
GUARANTOR:"Chart","First Name","Last Name","Middle Initial","Address 1","Address 2","City","St","Zip","Work Ph","Ext","Home Ph","SSN","Sex","Marital Status",Date Of Birth

PROVIDER:"Provider Code","First name","Last name","Middle initial","Credentials","Street 1","Street 2","City","State","Zip Code","Phone","Fax","SSN or Fed Tax ID","Federal Tax ID Indicator","License Number","UPIN","National Provider Identifier"

INSURANCE#1:"Insurance Code","Insurance Type","Insurance Name","Address Line 1","Address Line 2","City","State","Zip Code","Phone","Extension","Fax"

POLICY#1:"Insurance #1 Policy number","Insurance #1 Group number"

INSURANCE#2:"Insurance Code","Insurance Type","Insurance Name","Address Line 1","Address Line 2","City","State","Zip Code","Phone","Extension","Fax"

POLICY#2:"Insurance #2 Policy number","Insurance #2 Group number"

DX#1:"Diagnosis Code","Code Description","ICD9 Code"

DX#2:"Diagnosis Code","Code Description","ICD9 Code"

DX#3:"Diagnosis Code","Code Description","ICD9 Code"

DX#4:"Diagnosis Code","Code Description","ICD9 Code"

CPT#1:"Transaction Code","Code Description","Code Type"

CPT#2:"Transaction Code","Code Description","Code Type"

CPT#3:"Transaction Code","Code Description","Code Type"

CPT#4:"Transaction Code","Code Description","Code Type"

CPT#5:"Transaction Code","Code Description","Code Type"

CPT#6:"Transaction Code","Code Description","Code Type"

TRN:"DOS",CPT1,"Units","Charge",DX1,DX2,DX3,DX4

TRN:"DOS",CPT2,"Units","Charge",DX1,DX2,DX3,DX4

TRN:"DOS",CPT3,"Units","Charge",DX1,DX2,DX3,DX4

TRN:"DOS",CPT4,"Units","Charge",DX1,DX2,DX3,DX4

TRN:"DOS",CPT5,"Units","Charge",DX1,DX2,DX3,DX4

TRN:"DOS",CPT6,"Units","Charge",DX1,DX2,DX3,DX4

Additional explanation of complex data elements

Patient

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below	Column#	Data Element	Data Type	Max. Length	Remark
*	1	Chart	Text	15	Legacy number from exporting system
**	2	First Name	Text	20	
**	3	Last Name	Text	20	
*	4	Middle Initial	Text	1	
*	5	Address Line 1	Text	39	
*	6	Address Line 2	Text	39	
*	7	City	Text	25	
*	8	State	Text	2	
*	9	Zip Code	Text	10	

*	10	Work Phone	Numeric	14	
*	11	Work Phone Ext.	Numeric	6	
*	12	Home Phone	Numeric	14	Telephone numbers must not use any brackets or dashes e.g. 8015620111
*	13	Social Security #	Text	11	e.g. 528-33-3333
**	14	Sex	Text	1	F (or Female)=Female else Male
*	15	Marital Status	Text	1	S=Single; M=Married; X=Legally Separated; D=Divorced; W=Widowed; empty=Unknown/Not Applicable
*	16	Birth Date	Date	8	American or universal date format e.g. 03/14/1977 or 19770314

Note:

* field improves quality of imported data, but can be left empty

** field requires a value

Guarantor

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below	Column#	Data Element	Data Type	Max. Length	Remark
*	1	Chart	Text	15	Legacy number from exporting system
**	2	First Name	Text	20	
**	3	Last Name	Text	20	
*	4	Middle Initial	Text	1	
*	5	Address Line 1	Text	39	
*	6	Address Line 2	Text	39	
*	7	City	Text	25	
*	8	State	Text	2	
*	9	Zip Code	Text	10	
*	10	Work Phone	Numeric	14	
*	11	Work Phone Ext.	Numeric	6	
*	12	Home Phone	Numeric	14	Telephone numbers must not use any brackets or dashes e.g. 8015620111
*	13	Social Security #	Text	11	e.g. 528-33-3333
**	14	Sex	Text	1	F (or Female)=Female else Male
*	15	Marital Status	Text	1	S=Single; M=Married; X=Legally Separated; D=Divorced; W=Widowed; empty=Unknown/Not

* 16 Birth Date Date 8 Applicable
American or universal date format e.g. 03/14/1977 or 19770314

Note:

* field improves quality of imported data, but can be left empty

** field requires a value

Provider

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below	Column#	Data Element	Data Type	Max. Length	Remark
*	1	Provider Code	Text	5	Legacy number from exporting system
**	2	Provider First Name	Text	15	
**	3	Provider Last Name	Text	20	
*	4	Provider Middle Initial	Text	1	
	5	Credentials	Text	10	
	6	Address Line 1	Text	30	
	7	Address Line 2	Text	30	
	8	City	Text	20	
	9	State	Text	2	
	10	Zip Code	Text	10	
	11	Work Phone	Numeric	13	
	12	Fax.	Numeric	13	
*	13	SSN or Federal Tax ID	Text	11	e.g. 528-33-3333
*	14	Federal Tax ID Indicator	Logical	1	T- Federal Tax ID, F- SSN
	15	License #	Text	15	
*	16	UPIN	Text	20	
*	17	National Provider Identifier	Text	15	

Note:

* field is desirable

** Required field

Insurance Company

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below	Column#	Data Element	Data Type	Max. Length	Remark
*	1	Insurance Code	Text	9	Legacy number from exporting system
*	2	Insurance Type	Text	2	0=Commercial

- 1=Medicaid Physician
- 2=Medicare with Crossover
- 3=Medicare
- 4=Blue Shield
- 5=Champus
- 6=Worker's Compensation
- 7=Blue Cross ? Physician
- 8=HMO
- 9=PPO

**	3	Insurance Name	Text	40
*	4	Address Line 1	Text	39
*	5	Address Line 2	Text	39
*	6	City	Text	25
*	7	State	Text	2
*	8	Zip Code	Text	10
*	9	Phone	Numeric	14
*	10	Extension	Numeric	5
*	11	Fax	Numeric	14

Telephone numbers must not use any brackets or dashes e.g. 8015620111

Note:

* field improves quality of imported data, but can be left empty

** field requires a value

Policy

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below

Column#	Data Element	Data Type	Max. Length	Remark
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*	1	Policy Number	Text	20
*	2	Group Number	Text	20

Note:

* field is desirable

Dx

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below

Column#	Data Element	Data Type	Max. Length	Remark
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**	1	Diagnosis Code	Text	9	Preferably ICD9 Code
*	2	Code Description	Text	40	
*	3	ICD9 Code	Text	9	Same as <i>Diagnosis Code</i> if left empty

Note:

- * field improves quality of imported data, but can be left empty
- ** field requires a value

CPT

Key for Type column:

Text = alpha characters (e.g. a, b, c)

Numeric = numbers, whole and fractions e.g. (20.00,-7.50,-4,65)

Date = a YYYYMMDD format or MM/DD/YYYY (e.g. 20020625 or 06/25/2002).

See notes below	Column#	Data Element	Data Type	Max. Length	Remark
**	1	Transaction Code	Text	9	
*	2	Code Description	Text	40	
**	3	Code Type	Text	2	00=Procedure Insurance

Note:

- * field improves quality of imported data, but can be left empty
- ** field requires a value

Sample IWTIF Data File

PATIENT: "ACEV001","IRIS","ACEVEDO","","4444 TENESSEE AVENUE","","NEW PORT RICHEY","FL","34653","3525067699","","7272071315","580-06-1109","F","S",11/14/1961
PROVIDER: "JJ001","John","Jones","J","MD","234 Main Street","Suite E","Tampa","FL","33617","8136248000","8136248001","555-22-4444","0","B-5004","JJUPIN","JJONESNPI"
INSURANCE#1: ABPA,0,AMERICAN BENEFIT PLAN ADMINISTRATORS,234 MLK Blvd.,Suite 7860,Tallahassee,FL,37896,9045670000,1103,9045670001
POLICY#1: "XJWH11838450","99999ZJ6"
INSURANCE#2: CIG00,8,Cigna,2525 Big Bucks Ln.,,Mesa,AZ,85438,2345678,,
POLICY#2: "XJWH1183234","99999WJ6"
DX#1: "490.0","Bronchitis","490.0"
CPT#1: "86002","Test CPT1- I made this up","00"
CPT#2: "86003","Test CPT2- I made this one up too","00"
TRN: 08/31/2009,1,1,10.00,1
TRN: 08/31/2009,2,1,10.00,1
PATIENT: "ADAMS","SANDRA","ADAMS","A","555 LIGHTHOUSE WAY","","NEW PORT RICHEY","FL","34652","3525167699","","7278480025","265-45-1961","F","X",07/21/1940
PROVIDER: "JJ001","John","Jones","J","MD","234 Main Street","Suite E","Tampa","FL","33617","8136248000","8136248001","555-22-4444","0","B-5004","JJUPIN","JJONESNPI"
INSURANCE#1: ABPA,0,AMERICAN BENEFIT PLAN ADMINISTRATORS,234 MLK Blvd.,Suite 7860,Tallahassee,FL,37896,9045670000,1103,9045670001
POLICY#1: "XJWH11838450","99999ZJ6"
INSURANCE#2: CIG00,8,Cigna,2525 Big Bucks Ln.,,Mesa,AZ,85438,2345678,,
POLICY#2: "XJWH1183234","99999WJ6"
DX#1: "490.0","Bronchitis","490.0"
CPT#1: "86006","UCG-Qualitative Test Urine","00"
CPT#2: "86300","Heterophile Antibod/ Mono Test","00"
TRN: 08/31/2009,1,1,10.00,1
TRN: 08/31/2009,2,2,10.00,1

PATIENT: "AGADW000","Dwight","Again","","","1742 N. 83rd Ave.,"",,"
Phoenix","AZ","85021","","","4345777","333-22-4444","M","M ","03/30/1932"
PROVIDER: "MS001","Martin","Sheen","T","MD","123 Anywhere Place","Suite
3","Brandon","FL","33618","8136241234","8136245678","51-0558456","1","C-
6123","MSUPIN","MSHEENNPI"
INSURANCE#1: ABPA,0,AMERICAN BENEFIT PLAN ADMINISTRATORS,234 MLK Blvd.,Suite
7860,Tallahassee,FL,37896,9045670000,1103,9045670001
POLICY#1: "XJWH11838450","99999ZJ6"
INSURANCE#2: ABC00,8,ABC HEALTH PLAN OF NEW YORK,555 International
Plaza,,Jacksonville,FL,33799,9042345678,,
POLICY#2: "XJWH1183234","99999WJ6"
DX#1: "491.1","Test disease","491.1"
DX#2: "491.2","Test disease #2","491.2"
DX#2: "491.3","Test disease #3","491.3"
CPT#1: "86006","UCG-Qualitative Test Urine","00"
TRN: 08/31/2009,1,1,10.00,1,2,3