Admin Guide: Screen Scraping v1.2

Screen Scraping is an automated process in DCI that pulls new or updated authorizations from a funding source database and uploads them into DCI. This feature can be enabled at the funding source level. Now let's learn how to use the screen scraping features and all they have to offer.

Compatible Databases

- Focus - Arizona
- eXPRS - Oregon

Settings

Permissions/Roles Needed: Funding Source Admin Permission

To enable/disable screen scraping for a new Funding Source:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Settings' from the header then choose 'Funding Sources' from the side bar
3. Select 'Actions' in the top right corner, then select 'Add New Funding Source'
4. Fill out the required fields
5. You will notice a field labeled 'Supports Automated Authorization Download'.
6. Click 'Yes' to enable the system to utilize the screen scraping functionality for this particular Funding Source, or click 'No' to disable it.
7. In the field labeled 'Authorization Management System URL' you will choose from the dropdown and select the compatible database that your state utilizes
8. Next, enter the Authorization Management System login credentials. You will need the username and password for the current account you use to access the system manually via the web.
9. Click 'Save' then select 'Yes' on the confirmation window

To enable/disable screen scraping for an existing Funding Source:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Settings' from the header then choose 'Funding Sources' from the side bar
3. Click anywhere in the row to select a particular Funding Source
4. Select 'Actions' in the top right corner, then select 'Edit Funding Source'
5. You will notice a field labeled 'Supports Automated Authorization Download'.
6. Click 'Yes' to enable the system to utilize the screen scraping functionality for this particular Funding Source, or click 'No' to disable it.
7. In the field labeled 'Authorization Management System URL' you will choose from the dropdown and select the compatible database that your state utilizes
8. Next, enter the Authorization Management System login credentials. You will need the username and password for the current account you use to access the system manually via the web.
9. Click 'Save' then select 'Yes' on the confirmation window

* You will be able to save changes to the Funding Source even if the login credentials for the Authorization Management System are incorrect. Once the screen scraping processes runs, an email

notification will be sent to the email address listed on the Funding Source Profile. Users will receive a notification if the login failed. This email notification is configured in DCI and will typically be sent to users with a billing role for the cost center of the funding source. If you are unsure who is supposed to receive this email, please contact your supervisor or site administrator.

Service Code Default Rates and Maxes

Permissions/Roles Needed: Funding Source Admin Permission

Users have the option to set default rates and default daily, weekly and monthly maxes on service codes. When these values are set, the system will use them on new authorizations. The default rates and maxes will also prepopulate when a user manually creates an authorization for that service code when completed manually, however the values will be editable.

* It is important for AZ DDD screen scrape that defaults are set, however OR eXPRS screen scrape utilizes a different process that will pull the rates and maxes during the screen scrape process.

To set Default Rates:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Settings' from the header then choose 'Funding Sources' from the side bar
3. Use the search criteria at the top of the page to find the Funding Source that houses the Service Code you wish to add Defaults for or scroll down to locate. Click anywhere in the row to select that Funding Source.
4. Ensure the 'Service Code' tab is selected. Use the search criteria below Funding Source Details to find the Service Code that you wish to add Defaults for or scroll down to locate. Click anywhere in the row to select that Service Code.
5. Click 'Actions' in the top right corner, then select 'Edit Service Code'
6. You will see a field for 'Has Published Spec'. This will need to be set to 'Yes' in order to display defaults and maxes.
7. Enter the Default Billing Rate, Default Daily Max, Default Weekly Max and Default Monthly Max
8. Click 'Save' then select 'Yes' on the confirmation window.

Screen Scraping Process

Permissions/Roles Needed: Import Admin

To manually run the screen scraping process:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Import' from the header
3. On the dashboard screen, click 'Actions' then choose 'Run Screen Scrape Process'
4. Choose the Funding Source you wish to run the process for. Click 'Yes' then select 'Ok' on the confirmation window.
   a. If you do not see the Funding Source you are looking for on this list, ensure that Screen Scraping is enabled and all fields are filled out on the Funding Source Details screen.
5. The system will run Screen Scraping as a background process

6. Once the process has completed, an email will be sent to the email address listed on the Funding Source with an attached excel file summary of all new, updated, excluded and failed authorizations that were attempted.
    a. For the failed authorizations, a column will be present with a description as to why that particular authorization failed.

To have the system automatically run the screen scraping process:

1. DCI will run the Screen Scraping process as a scheduled job every night to check the Authorization Management System for all new, updated, excluded and failed authorizations.
2. Once the process has completed, an email will be sent to the email address listed on the Funding Source with an attached excel file summary of all new, updated, excluded and failed authorizations that were attempted.
    a. For the failed authorizations, a column will be present with a description as to why that particular authorization failed.
3. The Results file will also be saved on the Funding Source Profile page on the Attachments Tab.

* All new authorization are created with a status of 'Pending' and must be approved

Screen Scraping Basics

Updates to Screen Scraping Authorizations (Auth Result = Created):

- ➢ New Authorization
    - o The authorization ID of a new authorization is unique and the start or end date does not overlap an existing authorization

Updates to Screen Scraping Authorizations (Auth Result = Edited):

- ➢ Initial Balance Change
    - o The authorization ID of a new authorization is the same as an existing authorization with a different initial balance
- ➢ Effective Date Change
    - o The authorization ID of a new authorization is the same as an existing authorization with a different start date
- ➢ End Date Change
    - o The authorization ID of a new authorization is the same as an existing authorization with a different end date

Exclusions to Screen Scraping Authorizations (Auth Result = Excluded):

- ➢ Duplicate Authorization
    - o Authorization ID, start date and initial balance of new authorization are the same as the existing authorization in the system
- ➢ Duplicate Authorization with a different Rate
    - o If the rate is different on an Excluded authorization, the results report will show a result of Excluded with an Exception of "Rate Mismatch." This is specific to authorizations downloaded from eXPRS (OR DDS).

Failures to Screen Scraping Authorizations (Auth Result = Failed):

- Overlapping Authorization
  - Authorization ID of the new authorization is unique but the start or end date overlaps and existing authorization
- No Client profile associated with the authorization
  - The system could not find a profile in the system with the same Client ID as listed on the authorization
- No Client funding account associated with the authorization
  - The Client Funding Account (CFA) Account Reference field must contain the Client ID that is listed on the authorization. If the system cannot find a CFA with the client ID in the Account Reference field, the auth will fail.
- Multiple funding account matches found
  - The system found more than one CFA for the same client and service code.
- The service code is missing a default billing rate
  - This is specific to authorizations downloaded from Focus (AZ DDD)
- Fractional units
  - This exception occurs if the value for initial balance is calculated by amount divided by rate and that calculation results in a decimal number. This is specific to authorizations downloaded from eXPRS (OR DDS).

Downloaded Authorizations

Permissions/Roles Needed: Billing or Authorization Role

To mass approve new pending authorizations:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click 'Import' from the header
3. On the dashboard screen, click 'Actions' then choose 'Approve Imported Authorizations'
   a. Refer to the system generated email for all updated, new and failed authorizations.

* Authorizations can also be approved individually via Authorizations → Pending Authorizations