

Import Prices

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This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

The following describes the process for updating Health fund Item prices.

The import prices process only updates prices on items that have been already added to your item list. Please ensure you have configured all of the desired items/MBS items before the price updates are performed.

You will need a file with the price updates for importing into CareRight. Each file may have the name in the format [Agency/Rate Name]optional[_[State]]_[YYYYMM] where YYYY and MM are the year and month respectively that the rate takes effect.

Notes: (client can follow the steps to do by themselves)

For importing into CareRight the data needs to be in CSV format, with 2 columns titles 'item' & 'price' and an optional third column titled 'GST liability'

Points to consider while editing the Excel file to tab-delimited file(for TS);

*Download the Excel file.

*Delete all columns except Item number and Fund Benefit.

*No rows with column title.

*Delete rows with 'o' or any other texts on benefit column.

*no tabs before/after two columns.

*Download as **CSV(comma delimited)**: This requires microsoft excel

Importing a Price Schedule via CSV (For Business operating in multiple states of Australia or multiple regions within a state)

1. Click **Administration**.
2. Select **Accounting**.
3. Select **Rate Definitions**.
4. Click the **Show** button next to the rate you want to import.
5. Click **Import Prices**.
 - a. The Rate Definition Import screen will display.
6. Select the **Region** from the drop-down list (if there is one specified in the file name).
7. Set the **Effective Date** to the first day of MM/YYYY of the file name (which can be seen on screen).
8. Click **Choose file** and select the applicable CSV file for the rate you are updating.
9. Click the **Import** button.
 - a. **Note:** A message confirming the Effective Date of the import will appear — click **OK**.

Details

Name MBS 100%

Options

Region National

Effective Date 25/05/2020

CSV file Choose file

Import **Cancel**

cr.test.clintelsystems.com says

Import into Region National with Effective Date 25/05/2020?

OK **Cancel**

Using this method you can import the prices for several regions onto the one rate and at invoice time it will select the price based on the region the service location is in.

Importing a Price Schedule via CSV (For Business operating in one state of Australia and only one region)

1. Click **Administration**.
2. Select **Accounting**.
3. Select **Rate Definitions**.
4. Click the **Show** button next to the rate you want to import.
5. Click **Import Prices**.
 - a. The Rate Definition Import screen will display.
6. Select the "National" **Region** from the drop-down list.
7. Set the **Effective Date** to the first day of MM/YYYY of the file name (which can be seen on screen).
8. Click **Choose file** and select the applicable CSV file for the rate you are updating. This file may be names for the state you are based in if you are importing a health fund price update.
9. Click the **Import** button.
 - a. **Note:** A message confirming the Effective Date of the import will appear — click **OK**.
10. Either exit or go back to step 3 and continue with the next rate.

Details

Name

MBS 100%

Options

Region

National

Effective Date

25/05/2020

CSV file

Choose file

Import

Cancel

cr.test.clintelsystems.com says

Import into Region National with Effective Date 25/05/2020?

OK

Cancel