

Steps to Prepare a file to be uploaded into the MH Levy billing system (updated 4/2015)

1. Enter client information into the Excel spreadsheet you used the previous year or provided by Levy staff if you have never uploaded a year end list.
 - a. Enter a row for every client that you served with Levy funds during the grant period.
 - i. *List every person that received services that were billed to the Levy, regardless of what or how many services they received, for the grant year.*
 - b. The first three columns will be the same for every row:
 - i. **Grant Name** leave this as stated in the original file provided for you, *do not change it, this is how the billing program recognizes your grant*
 - ii. **Grant Year** the grant year you are reporting for
 - iii. **Submission Date** the date you upload the file, type as **mm/dd/yyyy**
 - c. **Last name** type the person's last name, no hyphens or spaces
 - d. **First Name** type the person's last name, no hyphens or spaces
 - e. **Date of Birth** the person's date of birth, type as **mm/dd/yyyy**. *As a default, if you do not know the birthdate of the individual enter 01/01/yyyy (the year according to their stated age)*
 - f. **Gender** should be typed as : **Male, Female, or TransGender**
 - g. **Insurance status** should be typed as: **Yes or No**
 - i. *Answer "yes" if the client had any type of insurance for mental health services at any point during the year they received Levy services. Answer "no" if they did not*
 - h. **Preferred Language** type the code from the attached list for the person's preferred language for service. If a language is not listed but you collect it or the participant reported it, type it in instead of a code. This will allow us to add the category and assign a code.
 - i. **Language Spoken at home** type the code from the attached list for the person's language spoken at home. If a language is not listed but you collect it or the participant reported it, type it in instead of a code. This will allow us to add the category and assign a code.
 - j. **Zip Code** type the person's home zip code (**5 digit only**). If the individual is homeless or residing in shelter or a residential program use the zip code for the facility/agency where the individual is residing.

- k. **Race** type the code from the attached list for the person's race. If a race is not listed but you collect it or the participant reported it, type it in instead of a code. This will allow us to add the category and assign a code. You may also provide more than one race /code by separating each with a comma (ex: AN,BK)
 - l. **Ethnicity** type the code from the attached list for the person's ethnicity. If an ethnicity is not listed but you collect it or the participant reported it, type it in instead of a code. This will allow us to add the category and assign a code.
2. Continue to save the file in Excel format as you are entering client information so that you do not lose your work.
3. Once you have finished entering all client information and your list is complete, you will need to save the file as a **"Tab Delimited" file**.
 - a. In Excel, click Save As and then (depending on what version of Excel you have) choose other formats, and/or "Save as", click "Text (Tab Delimited)"
 - b. Click Save
 - c. You will get a warning (or two) that you are saving this file in a tab delimited format, click "Yes"
 - d. You will now have a file with a ".txt" extension
4. You can now go into the Levy system, log in, and click on the "File Upload" tab.
 - a. Click the "Upload file" link.
 - b. Click the "Browse" button to find the file on your computer.
 - c. Select the file and click the "Upload" button.
 - d. You should then receive a message that the file has been uploaded.
 - i. If you get a message that says your upload contains errors, and you continue to have difficulty with the upload, you will be contacted by email by our programmer who will guide you through the errors.
5. Any other questions, please contact Susan Jones at
sejones@jacksoncountycare.org
or 816.842.7055 x3