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TrainNet

HAC **Enrollment Procedures** (Health and Accident Coverage)

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HAC Enrollment Procedures

Table of Contents

Background	2
What Is In This Document.....	2
How To Use This Document.....	2
Templates Available at http://usaidtraining.devis.com	3
Definitions.....	4
Enrollment Via Email Message.....	5
<i>Enrollment Requests</i>	5
<i>Enrollment Responses</i>	7
<i>Illustrative Examples</i>	8
Sample 'New' Request and Response.....	8
Sample 'Change' Request and Response	9
Sample 'Cancel' Request and Response.....	10
Sample 'Suspend / Resume' Actions	10
Sample with Group ID / Default Values	11
<i>Discussion of Examples</i>	12
Action Key Values.....	12
Keys Required in Every Enrollment Request.....	12
Important ID Numbers	12
Group IDs	14
Billing Information	14
Enrollment Via Data File	15
<i>Enrollment Request Format: Data File</i>	17
<i>Enrollment Response Format: Data File</i>	17
<i>Samples: Data File Enrollment Requests and Responses</i>	19
New Action Example.....	19
Change Action Example	19
Suspend Action Example.....	20
Resume Action Example	20
Reference.....	21
<i>Enrollment Request Data</i>	21
<i>Enrollment Response Data</i>	22
<i>Data Keys For Each Value of Action</i>	23

HAC Enrollment Procedures

Enrollment via Email Message
and
Enrollment via Data File

Background

Training contractors, grantees, and other programming agents will obtain Health and Accident Coverage (HAC) insurance for their participants directly from Highway to Health (HTH).

HTH supports the HAC enrollment process described in this document:

- **HAC Enrollment via Email Message.** An email enrollment process has been in effect since July 1997 and, with some modifications, is still supported.
- **HAC Enrollment via Data File.** Similar to enrollment via email message, but uses data files (spreadsheet or comma-separated value files) as the data transmission mechanism.

HTH may also offer other ways to make HAC enrollments convenient for users: registration via the World Wide Web, fax enrollments, etc. Contact the insurance provider directly for information on additional enrollment services they may offer.

What Is In This Document

1. A set of definitions that are used throughout the document.
2. A description of **HAC enrollment via email message**. Even if you have experience enrolling your participants in the current HAC email system, you should read this document to see how the system has changed.
3. A description of **HAC enrollment via data file**. An alternative enrollment method was created for certain training contractors who wished to use data files instead of email messages to send and receive enrollment data.
4. A reference section that gives additional information about the data used in enrollment requests.

How To Use This Document

1. If you received this document as a file, **print the document** and keep it for reference.
2. Before reading this document, read the **HAC Frequently Asked Questions (FAQ)** at <http://usaidthraining.devis.com> or email jvlsa@devis.com for a copy.
3. After reading the HAC FAQ, read this entire document. If you are going to use enrollment via email message, you can skim the **Enrollment Via Data File** section. But if you plan to use enrollment via data file, read **Enrollment Via Email Message** first. Enrollment via data file builds on information covered in enrollment via email message.

Templates Available at <http://usaidtraining.devis.com>

Email Message Template

A template for email enrollment requests can be found later in this document. The template is a text file with blank Default and Enrollment ID sections. Simply copy and paste as many Enrollment ID sections as you need, then fill in the blanks to create a valid enrollment request. Send your email to Diane Foraker at dforaker@hthworldwide.com.

Data File Template

An Excel spreadsheet template with column headings is also available at the USAID Help Desk Web Site. Fill in the blanks of the spreadsheet with enrollment data. Send the spreadsheet file as-is, or export the data to CSV format. Attach it to an email and send it to Diane Foraker at dforaker@hthworldwide.com.

Go to <http://usaidtraining.devis.com> to download the Excel template.

Definitions

Many of the following terms are used throughout this document. Read these terms carefully, and then refer back to this page as you read the remainder of the document.

TraiNet - USAID's official training management database program.

Programming Agent - Any USAID contractor, grantee, office, or bureau that sends foreign nationals to the US for agency-sponsored training.

Enrollment - The process by which a USAID participant obtains HAC insurance. The participant is 'enrolled' in an insurance plan.

Enrollee - a participant, trainee, USAID employee, or any other individual enrolled in a HAC insurance plan.

Enrollment request - A written or verbal communication from a USAID programming agent that furnishes information about one or more training participants for the purpose of obtaining HAC insurance.

Enrollment Action - The specific action required by an enrollment request. Enrollment via email message and data file both support these action types: **New, Change, Cancel, Suspend, Resume**.

Enrollment response - The response by an insurance provider to an enrollment request. The response either confirms coverage by supplying insurance ID(s) for the participant(s), explains why coverage was not issued, or reports on the results of processing the requested action.

TraiNet Site ID - An alphanumeric code that uniquely identifies a USAID programming agent. The TraiNet Site ID must be included in each enrollment request. Users do not have to be running TraiNet to get a TraiNet Site ID, but they must submit a TraiNet Site ID in their HAC enrollments. The Site ID is used by insurance providers to track contact and billing information and by USAID during HAC system monitoring.

Site ID - Same as TraiNet Site ID

Enrollment ID - An Enrollment ID is a number or code, up to twelve characters long, which identifies a single participant in the HAC insurance system. The Enrollment ID is submitted along with the participant's enrollment data when requesting insurance and in all subsequent communication about that trainee's HAC enrollment. The Site ID and the Enrollment ID insure that you can uniquely identify your trainees in the HAC system.

TraiNet database software generates and manages Enrollment IDs for you. If you are not using TraiNet, you must create and track enrollment IDs on your own. For example, you could create a log and simply assign each participant a sequential number (1, 2, 3 ... n), or you could use some other ID number (social security, driver's license, passport number, or any unique ID).

Insurance ID - A number or other code furnished by the insurance provider and used by the participant to file claims. Also known as a subscriber ID or policy number.

Group ID - An alphanumeric code used to categorize enrollees so that they appear on a separate bill. Group IDs are not required. If Group IDs are not used, all enrollees for a given site ID will be billed together.

Country Code - A two-letter code that identifies the sponsoring country of a trainee. If you have any question about what country code to use, contact jylsa@devis.com.

Template - A text file or spreadsheet already set up in the format required to create an enrollment request. Filling in a template file is an easy and convenient way to create an enrollment request.

Date Format - Several dates are required in the data that must be submitted for HAC enrollments. The format used in these dates is always: mm/dd/yyyy. For example: April 1, 2001 = 4/1/2001.

Enrollment Via Email Message

HAC Enrollments Are Pairs of 'Requests and Responses'

Each HAC enrollment communication consists of a request and a response:

- The **request** sends required data to the insurance provider and specifies an 'action' to perform.
- The **response** returns a **result**, an **insurance ID**, and optional **messages** to explain what happened during processing of the request.

Requests and responses are sent as email messages. Your emails should be sent to Diane Foraker at dforaker@hthworldwide.com.

Enrollment Requests

HAC enrollment requests must be in the format shown below. The format consists of **Sections** and **Data Keys**.

- **Sections** consist of everything between two section names. Section names are text surrounded by square brackets, like **[Default]**.
- **Data keys** have the format **Data key = Value**. For example, "Date Submitted" and "Last Name" are examples of data keys to which values can be assigned. Like this:
 - **Date Submitted = 12/31/2001**
 - **Last Name = Doe**
 - **Sex = F**

Enrollment Requests have two section types:

- **Default section** Only one Default section is allowed per message. Type the word 'Default' between square brackets to create the Default section.
- **Enrollment ID sections** One enrollment message can have as many Enrollment ID sections as you need, one for each trainee. Type a unique Enrollment ID between square brackets to create an Enrollment ID section.

Enrollment Request Format

[Default]

TrailNet Site ID=
Date Submitted =
Group ID=

[Enrollment ID - different for every trainee]

Action =
First Name =
Last Name =
Birth Date =
Sex =
Start date =
End date =
Medical Certificate =
Medical Waiver =
Insurance Plan =
Country =
Suspend Date =
Resume Date =

You can copy and paste as many Enrollment ID sections as you need. The only condition is that all Enrollment IDs belong to the Group ID (optional) submitted in the Default section.

Notes on the Default Section

When you create an enrollment request, place the word Default between square brackets [Default] anywhere in the message. In the example format above, the Default section comes first. In reality, it can be placed anywhere.

Data Keys in the Default section

TraNet Site ID – The most important key in the Default section. You must submit the TraNet Site ID in every enrollment request. If you do not have a Site ID, contact jvisa@devis.com.

Date Submitted – The date you sent the enrollment request.

Group ID – Assigns all Enrollment IDs (all trainees) in the enrollment request to a group. The Group ID is optional. See **Group ID** in the [Definitions section](#) for more information.

Notes on Enrollment ID sections

An **Enrollment ID** uniquely identifies a trainee sponsored by the Site ID found in the Default section.

Enrollment IDs must be unique for each participant at your site. That means the creation of Enrollment IDs must be coordinated within the organization identified by your Site ID. If it is not possible to coordinate the creation of unique Enrollment IDs at a given site – for example, the people who create Enrollment IDs are not located at the same place or don't have access to the same data – you may need to request another Site ID. Contact jvisa@devis.com.

Each Enrollment ID section is created by entering a participant's unique enrollment ID between square brackets, for example [EGXIIIE999999], [007], [123456789], or any combination of letters and numbers up to twelve characters long. The Enrollment ID can be anything you like but, again, must be unique for each trainee at your site.

Data Keys in Enrollment ID sections

See the [Enrollment Request Data](#) table in the [Reference](#) section at the end of this document for a full explanation of data keys in the Enrollment ID section.

Enrollment Responses

The insurance provider receives and processes enrollment requests. They create **enrollment responses** which are returned via email to the sender of the request.

An enrollment response is an exact copy of the enrollment request with data keys added to report processing results. In the format below, the added keys are shown below in ***bold italics***.

Enrollment Response Format

<p>[Default]</p> <p><i>Date Processed =</i></p> <p><i>Message =</i></p> <p>TrailNet Site ID=</p> <p>Date Submitted =</p> <p>Group ID=</p> <p>[Enrollment ID]</p> <p><i>Result =</i></p> <p><i>Insurance ID =</i></p> <p><i>Message =</i></p> <p>Action =</p> <p>First Name =</p> <p>Last Name =</p> <p>Birth Date =</p> <p>Sex =</p> <p>Start date =</p> <p>End date =</p> <p>Medical Certificate =</p> <p>Medical Waiver =</p> <p>Insurance Plan =</p> <p>Country =</p> <p>Suspend Date =</p> <p>Resume Date =</p>

Keys added to an enrollment request to create an enrollment response:

- **Date Processed** key in the Default section
- **Result** key in every Enrollment ID section. The Result should be set to either **OK** or **Error**, depending on result of the requested action.
- **Insurance ID** key in every Enrollment ID section. An Insurance ID in response to a New request confirms that coverage was issued; if the New request fails, no Insurance ID will be returned. For Change, Cancel, Resume, or Suspend actions, verify the returned Insurance ID to make sure it matches your records. This will verify that the action was taken for the proper participant.
- Optional **Message** keys in the Default section or in Enrollment ID sections. A Message in the Default section is general in nature and pertains to the entire response. A Message in an Enrollment ID section explains something about that particular enrollment ID.

Illustrative Examples

A few examples will help show how the enrollment response and request formats work in practice. Study the following examples, then look at the **Discussion of Examples**. Note in particular that each enrollment request can enroll many trainees, as long as their Default information is the same. Also, each enrollment request can have many different types of actions (New, Change, etc). For clarity, the examples show only one type of action per message.

SAMPLE 'NEW' REQUEST AND RESPONSE

Note that you must supply *all* data keys with every Enrollment ID in a New action. Otherwise, the request will produce an error.

Enrollment Request
[Default] Date Submitted = 1/31/1999 TrailNet Site ID = USXABC
[USXABC111023] Action = New First Name = Mamadou Last Name = Barry Birth Date = 12/1/1955 Sex = M Start date = 3/1/1999 End date = 3/1/2001 Medical Certificate = Y Medical Waiver = Y Insurance Plan = B Country = SG
[USXABC111222] Action = New First Name = Jeanne Birth Date = 12/32/1959 Sex = F Start date = 5/1/1999 End date = 8/1/2001 Medical Certificate = Y Medical Waiver = Y Insurance Plan = A

Enrollment Response
[Default] Date Processed = 2/1/1999 Message = Questions? Email Diane Foraker at dforaker@hthworldwide.com Date Submitted = 1/31/1999 TrailNet Site ID = USXABC
[USXABC111023] Result = OK Insurance ID = ABC-123-DEF-456-X Action = New First Name = Mamadou Last Name = Barry Birth Date = 12/1/1955 Sex = M Start date = 3/1/1999 End date = 3/1/2001 Medical Certificate = Y Medical Waiver = Y Insurance Plan = B Country = SG
[USXABC111222] Result = Error Message = Invalid Birth Date: 12/32/1959, No Sponsoring Country, No Last Name Action = New First Name = Jeanne Birth Date = 12/32/1959 Sex = F Start date = 5/1/1999 End date = 8/1/2001 Medical Certificate = Y Medical Waiver = Y

SAMPLE 'CHANGE' REQUEST AND RESPONSE

Note that when submitting data with a Change action, you have two choices:

- supply only the data keys that you wish to change
- supply all data keys, even the ones that aren't changing. You may use software to generate enrollment messages. The easiest approach to creating such software is to include all data keys, changed or not.

When processing Change actions, the insurance provider should ignore keys with values identical to current data, and will assume that blank or missing keys haven't changed.

Change Actions: One Successful, One Not

Successful: End Date moved further into future (coverage period extended)
Unsuccessful: Start Date change

Enrollment Request

[Default]
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC111023]
Action = Change
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
End date = 12/31/2002

[USXABC888999]
Action = Change
First Name = Thierno
Last Name = Kane
Birth Date = 11/23/1967
Start Date = 12/1/1998

Enrollment Response

[Default]
Date Processed = 3/4/1999
Message = Questions? Email Diane Foraker at dforaker@hthworldwide.com
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC111023]
Result = OK
Insurance ID = ABC-123-DEF-456-X
Message = Changed end date: 12/31/2002
Action = Change
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
End date = 12/31/2002

[USXABC888999]
Result = Error
Insurance ID = DEF-134-DXX-416-F
Message = Cannot change start date
Action = Change
First Name = Thierno
Last Name = Kane
Birth Date = 11/23/1967
Start Date = 12/1/1998

SAMPLE 'CANCEL' REQUEST AND RESPONSE

No data keys are required and will be ignored when the Action key is set to Cancel. The coverage is canceled immediately. If you include other data keys, they will be ignored.

Enrollment Request

[Default]
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC111023]
Action = Cancel
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
End date = 12/31/2002

Enrollment Response

[Default]
Date Processed = 3/4/1999
Message =
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC111023]
Result = OK
Insurance ID = 444-333-444-JYC
Message = Coverage canceled on 3/4/1999
Action = Cancel
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
End date = 12/31/2002

SAMPLE 'SUSPEND / RESUME' ACTIONS

If you submit a Suspend or Resume action, you must supply the Suspend Date or Resume Date key in the appropriate Enrollment ID section. The Suspend and Resume Date keys are ignored in all other types of actions.

Enrollment Request

[Default]
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC888999]
Action = Suspend
First Name = Thierno
Last Name = Kane
Birth Date = 11/23/1967
Suspend Date = 4/1/1999

[USXABC111023]
Action = Resume
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
Resume Date = 5/2/1999

Enrollment Response

[Default]
Date Processed = 3/4/1999
Message = Questions? Email Diane Foraker at dforaker@hthworldwide.com
Date Submitted = 3/2/1999
TrailNet Site ID = USXABC

[USXABC888999]
Result = OK
Insurance ID = DEF-134-DXX-416-F
Message = Coverage suspended on 4/1/1999
Action = Suspend
First Name = Thierno
Last Name = Kane
Birth Date = 11/23/1967
Suspend Date = 4/1/1999

[USXABC111023]
Result = Error
Insurance ID = 444-333-444-JYC
Message = Cannot resume: Coverage is not currently suspended.
Action = Resume
First Name = Mamadou
Last Name = Barry
Birth Date = 12/1/1955
Resume Date = 5/2/1999

SAMPLE WITH GROUP ID / DEFAULT VALUES

Group IDs are described in more detail in the **Discussion of Examples** section.

Group IDs allow training contractors/grantees to group trainees for billing purposes. Group IDs can be up to 12 characters long. All enrollees in the following example will belong to the EconPolicy group and will appear on their own separate bill. You must furnish a billing address for each Group ID you create. You can submit billing information via email, phone, or fax. Consult the insurance provider.

To facilitate manual creation of enrollment requests, **default values** can also be set in the Default section. Placing a data key in the Default section is the same thing as placing it in every Enrollment ID section. Default values for Start Date, End Date, Insurance Plan, and Country are set in the following example.

Enrollment Request

<p>[Default] Date Submitted = 3/2/1999 TraiNet Site ID = USXABC Group ID = EconPolicy Start date = 3/1/1999 End date = 3/1/2001 Insurance Plan = B Country = SG</p> <p>[EP1] Action = New First Name = Mamadou Last Name = Barry Birth Date = 12/1/1955 Sex = M Medical Certificate = Y Medical Waiver = Y</p> <p>[EP2] Action = New First Name = Marion Last Name = Nosta Birth Date = 4/1/1933 Sex = F Medical Certificate = Y Medical Waiver = Y</p>
--

Enrollment Response

<p>[Default] Date Processed = 3/4/1999 Message = Questions? Email Diane Foraker at dforaker@hthworldwide.com Date Submitted = 3/2/1999 TraiNet Site ID = USXABC Group ID = EconPolicy Start date = 3/1/1999 End date = 3/1/2001 Insurance Plan = B Country = SG</p> <p>[EP1] Result = OK Insurance ID = 444-333-444-JYC Action = New First Name = Mamadou Last Name = Barry Birth Date = 12/1/1955 Sex = M Medical Certificate = Y Medical Waiver = Y</p> <p>[EP2] Result = OK Insurance ID = 444-321-424-JYC Action = New First Name = Marion Last Name = Nosta Birth Date = 4/1/1933 Sex = F Medical Certificate = Y Medical Waiver = Y</p>

Discussion of Examples

ACTION KEY VALUES

The Action key can have one of the following values:

Value of Action Key	What it means and data you must supply
New	New insurance coverage is requested for a new enrollment ID. You must supply all data for the participant.
Change	Correct or change data for this enrollment ID. Supply the data you wish to change. By the way, it is OK to supply data that is the same as the current data; the insurance provider will ignore it.
Cancel	Cancel coverage immediately for this Enrollment ID. No data keys required.
Suspend	Temporarily suspend coverage for this Enrollment ID. For example, while the participant is outside the U.S. Supply the Suspend Date key.
Resume	Resume suspended coverage for this Enrollment ID. For example, the participant has returned to the U.S. Supply the Resume Date key.

KEYS REQUIRED IN EVERY ENROLLMENT REQUEST

Action =

First Name =

Last Name =

Birth Date =

The above keys should always be included in every Enrollment ID section to facilitate manual processing by the insurance provider, and to make it easier to manually process responses (print, file, or perform manual data entry). Remember: all dates are in US format - mm/dd/yyyy.

IMPORTANT ID NUMBERS

The preceding examples also show that three ID numbers are important in the request and response messages:

ID	Where	Purpose
TraNet Site ID	Default Section	Identifies the contractor/grantee for billing purposes and for USAID monitoring.
Enrollment ID	In brackets at the top of each section containing information about the enrollee.	<p>Identifies the enrollee (the participant). See the Templates Available at http://usaidtraining.devis.com</p> <p>Email Message Template</p> <p>A template for email enrollment requests can be found later in this document. The template is a text file with blank Default and Enrollment ID sections. Simply copy and paste as many Enrollment ID sections as you need, then fill in the blanks to create a valid enrollment request. Send your email to Diane Foraker at dforaker@hthworldwide.com.</p> <p>Data File Template</p> <p>An Excel spreadsheet template with column headings is also available at the USAID Help</p>

		<p>Desk Web Site. Fill in the blanks of the spreadsheet with enrollment data. Send the spreadsheet file as-is, or export the data to CSV format. Attach it to an email and send it to Diane Foraker at dforaker@hthworldwide.com.</p> <p>Go to http://usaidtraining.devis.com to download the Excel template.</p> <p>Definitions section for a more thorough explanation.</p>
Insurance ID	Enrollment ID section (in the response)	<ol style="list-style-type: none"> 1. Confirms that insurance has been issued 2. Serves as a policy number in filing claims. 3. Returned in each Enrollment ID section for verification.

GROUP IDs

Insurance providers will normally send one bill for all the HAC enrollees from a given training contractor, i.e., all enrollees from a TraiNet Site ID. Sometimes for accounting or other management reasons, a training contractor may want separate bills for certain groups of enrollees, for example, when different USAID contracts are managed from the same site. That's where Group IDs come in:

Insurance providers will create separate bills for each Group ID you wish to create. You assign enrollees to a group by supplying a Group ID in the Default section of the enrollment request. For example, if you include:

[Default]

Group ID = PubHealth

in your enrollment request, all the enrollees in that message will be assigned to the PubHealth group and will be billed as a group. You must supply billing information for each Group ID you use. Ask your insurance provider how to submit billing information.

Things to Remember about Group IDs

- The Group ID is optional. If you don't supply it, the enrollees in your request will appear on the bill sent monthly to the default billing address for your site.
- Each Group ID must be twelve characters or less in length. Longer IDs may be cut short by the insurance provider.
- Since the Group ID is placed in the Default section, it applies to all enrollees in that enrollment request. If you want to create enrollments for two different Groups IDs, you must create two different email messages.

BILLING INFORMATION

Your HAC insurance provider must have up-to-date

- 'default' billing information for your TraiNet Site ID. This is the address to which bills will be sent for all enrollees who do not belong to a Group ID.
- billing information for each Group ID you create.

You will be asked for default billing information for your site when you obtain your TraiNet Site ID. That information will be forwarded to all insurance providers as soon as your Site ID is issued. If that billing information changes, you must notify the insurance provider directly.

You must also submit to the insurance provider billing information for each Group ID you create.

Ask your insurance provider for guidance on submitting and updating billing information.

Enrollment Via Data File

Several training contractors with large participant databases requested the specification of an enrollment process using data files, such as spreadsheets, instead of email messages.

Please read the **Enrollment Via Email Message** section before reading this section. Enrollment via data file is based on enrollment via email message. Since HAC enrollment via data file evolved from HAC enrollment via email message, it is easiest to describe data file enrollment in terms of how it differs from email message enrollment.

Email Message Enrollment	How Data File Enrollment Differs
Enrollment request and response data are transmitted as email message text (using Windows INI-file formatting).	Enrollment request and response data are transmitted in a comma-separated-values (CSV) or a spreadsheet file.
Enrollment data for each participant is contained in one [Enrollment ID] section of the message.	Each record in the CSV file, or each row in the spreadsheet, corresponds to one Enrollment ID section of the email message.
The order of the data in the [Enrollment ID] section does not matter.	The order of the data for each line (CSV file) or row (spreadsheet) must be standardized. See Field Order below.
Enrollment via email message supports a [Default] section.	Because of the record-based nature of CSV files and spreadsheets, a [Default] section cannot be supported. All required data must be repeated in each line or row.
A Group ID can be specified in the [Default] section. That Group ID applies to all enrollments in the message.	A different Group ID can be specified in each enrollment record. There is no way to specify a 'default' Group ID for the data file.

Field Order

The following list shows the required order of comma-separated values in each line of a CSV file, or the order of values in each cell of one spreadsheet row. Fields in **bold** are added to an enrollment request to create an enrollment response. See **Samples** below for examples.

1. Action
2. Date Submitted
3. Site ID
4. Enrollment ID
5. Group ID
6. First Name
7. Last Name
8. Birth Date
9. Sex
10. Start date
11. End date
12. Suspend Date
13. Resume Date
14. Medical Certification
15. Medical Waiver
16. Insurance Plan
17. Country
18. **Process Date**
19. **Result**
20. **Insurance ID**
21. **Message**

See the **Reference** Section for details on each field above. In particular, note that the **Action** field must be one of the following: **New, Change, Cancel, Suspend, Resume**.

Note also the **Date Submitted** and **Site ID** in each record is repeated in every record and is thus redundant. Since there is no **Default** section in a data file, this redundancy cannot be avoided.

Enrollment Request Format: Data File

As described in Field Order above, the data in enrollment data files must appear as shown below. This example shows a typical CSV (comma-separated value) file. The same order applies to the cells in one row of a spreadsheet submission.

Action; Date Submitted; Site ID; Enrollment ID; Group ID; First Name; Last Name; Birth Date; Sex; Start date; End date; Suspended Date; Resume Date; Med Cert; Med Waiver; Ins Plan; Country

Sample enrollment data files are shown with matching responses in the Samples section below.

Enrollment Response Format: Data File

See the [Notes on the Default Section](#)

When you create an enrollment request, place the word Default between square brackets [Default] anywhere in the message. In the example format above, the Default section comes first. In reality, it can be placed anywhere.

Data Keys in the Default section

TrainNet Site ID – The most important key in the Default section. You must submit the TrainNet Site ID in every enrollment request. If you do not have a Site ID, contact jvisa@devis.com.

Date Submitted – The date you sent the enrollment request.

Group ID – Assigns all Enrollment IDs (all trainees) in the enrollment request to a group. The Group ID is optional. See **Group ID** in the Definitions section for more information.

[Notes on Enrollment ID sections](#)

An **Enrollment ID** uniquely identifies a trainee sponsored by the Site ID found in the Default section.

Enrollment IDs must be unique for each participant at your site. That means the creation of Enrollment IDs must be coordinated within the organization identified by your Site ID. If it is not possible to coordinate the creation of unique Enrollment IDs at a given site – for example, the people who create Enrollment IDs are not located at the same place or don't have access to the same data – you may need to request another Site ID. Contact jvisa@devis.com.

Each Enrollment ID section is created by entering a participant's unique enrollment ID between square brackets, for example [EGXIIIE999999], [007], [129456789], or any combination of letters and numbers up to twelve characters long. The Enrollment ID can be anything you like but, again, must be unique for each trainee at your site.

Data Keys in Enrollment ID sections

See the Enrollment Request Data table in the Reference section at the end of this document for a full explanation of data keys in the Enrollment ID section. Enrollment Responses the **Enrollment Via Email Message** section for detailed information on how enrollment responses are created. Briefly, responses simply add information to a copy of the enrollment request to report processing results. The approach for data file enrollment consists of simply returning the enrollment request data file with processing results appended to each line (CSV) or added to each row (spreadsheet).

HAC Enrollment Procedures
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The enrollment response data file format simply adds four fields to the end of the enrollment request format:

Action, Submitted Site ID, Enroll ID, Group ID, First, Last, Birth, Sex, Start, End, Suspend, Resume, Med Cert, Med Waiver, Ins Plan, Country, Process Date, Result, Insurance ID, Message

Detailed explanations of the response data elements are included in the Enrollment Via Email Message section. Briefly:

- **Process Date** is the date the enrollment request was processed by the insurance provider.
- **Result** should be set to 'OK' or 'Error'
- **Insurance ID** should always be included in enrollment responses to provide verification that data for the proper enrollee was processed.
- **Message** is optional and may contain any information the insurance provider wishes to return.

Samples: Data File Enrollment Requests and Responses

- > Samples are shown in CSV format. Spreadsheet files would work in the same way, except that data would be entered into separate cells in a single row in the order shown.
- > For simplicity, the samples show only one type of action per file. In reality, many different actions (New, Change, etc) could be included in a single file.
- > No standard for naming request/response files has been defined. One useful naming convention might be to use the date and Site ID. For example: "USXABC 03-31-1999.csv" would identify the data file sent to an insurance provider by site USXABC on March 31, 1999. The insurance provider could rename the response file with an R appended to the file name: "USXABC 03-31-1999-R.csv". This simple standard is used in the examples below.

NEW ACTION EXAMPLE

"USXABC 03-01-1999.CSV" (Request File)

New, 3/1/1998, USXABC, USXABC000024, EconPolicy, John, Doe, 11/11/1966, M, 1/15/1998, 2/15/1998, , , Y, Y, A, UK
New, 3/1/1998, USXABC, USXABC000025, EconPolicy, Barry, Mamadou, 3/32/1955, M, 1/15/1998, 2/15/1998, , , Y, Y, A, SG
New, 3/1/1998, USXABC, USXABC000026, AgEcon, Alice, Kahn, 3/12/1945, F, 2/10/1998, 3/14/1998, , , Y, Y, A, SG
New, 3/1/1998, USXABC, USXABC000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/2001, , , Y, Y, B, SG

"USXABC 03-01-1999-R.CSV" (Response File)

New, 3/1/1998, USXABC, USXABC000024, EconPolicy, John, Doe, 11/11/1966, M, 1/15/1998, 2/15/1998, , , Y, Y, A, UK, 3/2/1998, OK, ABC-123-567-Z,
New, 3/1/1998, USXABC, USXABC000025, EconPolicy, Barry, Mamadou, 3/32/1955, M, 1/15/1998, 2/15/1998, , , Y, Y, A, SG, 3/2/1998, Error, , Invalid birth date: 3/32/1955
New, 3/1/1998, USXABC, USXABC000026, AgEcon, Alice, Kahn, 3/12/1945, F, 2/10/1998, 3/14/1998, , , Y, Y, A, SG, 3/2/1998, OK, ZZX-444-567-Y,
New, 3/1/1998, USXABC, USXABC000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/2001, , , Y, Y, B, SG, 3/2/1998, OK, ABC-CBA-123-321 ,

CHANGE ACTION EXAMPLE

Based on New actions above: John Doe's insurance end date is extended, Alice Kahn's birth date is corrected.

"USXABC 02-01-1999.CSV" (Request File)

Change, 2/1/1998, USXABC, USXABC000024, EconPolicy, John, Doe, 11/11/1966, M, 1/15/1998, 3/26/1998, , , Y, Y, A, UK
Change, 2/1/1998, USXABC, USXABC000026, AgEcon, Alice, Kahn, 3/12/1956, F, 2/10/1998, 3/14/1998, , , Y, Y, A, SG

"USXABC 02-01-1999-R.CSV" (Response File)

Change, 2/1/1998, USXABC, USXABC000024, EconPolicy, John, Doe, 11/11/1966, M, 1/15/1998, 3/26/1998, , , Y, Y, A, UK, 2/13/1998, OK, ABC-123-567-Z, End Date Changed
Change, 2/1/1998, USXABC, USXABC000026, AgEcon, Alice, Kahn, 3/12/1956, F, 2/10/1998, 3/14/1998, , , Y, Y, A, SG, 2/13/1998, OK, ZZX-444-567-Y , Birth date changed

HAC Enrollment Procedures
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SUSPEND ACTION EXAMPLE

Based on New actions above: Thiermo Goudiaby's insurance is suspended as of 4/2/1999. The optional Message is omitted.

"USXABC 03-15-1999.CSV" (Request File)

Suspend, 3/15/1999, USXABC, USXABC0000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/2001, 4/2/1999, Y, Y, A, SG

"USXABC 03-15-1999-R.CSV" (Response File)

Suspend, 3/15/1999, USXABC, USXABC0000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/2001, 4/2/1999, Y, Y, A, SG, 3/17/1998, OK, ABC-CBA-123-321,

RESUME ACTION EXAMPLE

Following Suspend Action above: Thiermo Goudiaby's insurance is resumed as of 8/28/1999. The optional Message is omitted.

"USXABC 07-15-1999.CSV" (Request File)

Resume, 7/15/1999, USXABC, USXABC0000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/1998, , 8/28/1999, Y, Y, A, SG

"USXABC 07-15-1999-R.CSV" (Response File)

Resume, 7/15/1999, USXABC, USXABC0000027, AgEcon, Thiermo, Goudiaby, 11/11/1966, M, 2/10/1998, 3/14/1998, , 8/28/1999, Y, Y, A, SG, 7/17/1998, OK, ABC-CBA-123-32

Reference

Enrollment Request Data

The following table summarizes enrollment request content and groups the data into elements corresponding to the sections and data keys of enrollment requests. See also **Data Keys For Each Value of Action**. All dates formatted as mm/dd/yyyy.

Section	Data Keys	Type	Comments
Default	Site ID	Character(6)	Assigned by USAID's data management contractor
	Date Submitted	Date	This should contain the date that the enrollment request is sent to the insurance provider. The enrollment response should return this key, as well as a 'Date Processed' parameter that will show the turnaround time of the request. Format: mm/dd/yyyy
	Group ID <i>Optional</i>	Character(12)	Can contain letters, numbers, hyphens, and spaces
	Enrollee Data elements <i>Optional</i>		One enrollment request can contain many enrollments. Some data may be the same for every enrollment (for example Insurance Plan, Start and End Dates, or Group ID). Default information allows users to enter in one place the data that pertains to all enrollments. See Sample with Group ID / Default Values for more information.
Enrollment ID	Enrollment ID	Character (12)	Unique ID for each insured participant.
	Action	Character	This data key specifies the action to be performed on the specified enrollment ID.
	First Name	Character (40)	
	Last Name	Character (40)	
	Sex	Character (1)	M or F
	Birth Date	Date	Format: mm/dd/yyyy
	Medical Certificate	Character (1)	Y or N
	Medical Waiver	Character (1)	Y or N
	Insurance Plan	Character (1)	A or B
	Start Date	Date	Format: mm/dd/yyyy Date insurance coverage should begin
	End Date	Date	Format: mm/dd/yyyy Date insurance coverage should end
	Suspend Date	Date	Format: mm/dd/yyyy Date to begin a temporary suspension of coverage
	Resume Date	Date	Format: mm/dd/yyyy Date coverage should resume after a temporary suspension
	Country	Character(2)	Country is a two-letter code for the sponsoring country. Please contact Devis at jvisa@devis.com if you have any questions regarding your valid two-letter code.

Enrollment Response Data

The following table summarizes enrollment response data, which is added to the enrollment request by the insurance provider. All dates formatted as mm/dd/yyyy.

Section	Data Keys	Type	Comments
Default	Date Processed	Date	Date the insurance provider processed the request. The difference between the Date Submitted and Date Processed will show the turnaround time. Format: mm/dd/yyyy
	Message	Character(255)	Optional The Message key in the Default section is an optional key that may contain error messages, general information, or other information the insurance provider wishes to return about the message as a whole.
Enrollment ID	Result	Character(6)	Reports the result of processing the requested action. Will be set either to 'OK' or 'Error'.
	Insurance ID	Character(?)	For all actions except unsuccessful New enrollments, should be set to the Insurance ID for the participant identified by the Enrollment ID. Insurance IDs may be of arbitrary length. Consult your insurance providers for the maximum length of insurance IDs they create.
	Message		Optional The Message key in the Enrollment ID section is an optional key that may contain error messages or other information the insurance provider wishes to return about the processing of the action for that particular participant.

Data Keys For Each Value of Action

Action Key Value	Data Keys in Enrollment ID section	Comments
All Actions	First Name = Last Name = Birth Date =	These keys should be included for all actions to facilitate manual processing.
New	First Name = Last Name = Birth Date = Sex = Medical Certificate = Medical Waiver = Insurance Plan = Start date = End date = Country =	For new insurance, all data keys are required.
Change	*First Name = *Last Name = *Birth Date = +Sex = +Medical Certificate = +Medical Waiver = +Insurance Plan = +Start date = +End date = +Suspend date = +Resume date = +Country =	<p>The Change action provides for correction or updating of data. The keys marked (*) should always be present to facilitate manual processing. Any, all, or none of the optional keys (+) may be present in a Change action. Processing software or data entry personnel can assume the omitted keys, or keys with blank values, have not changed.</p> <p>To simplify software creation of a Change action, data keys may be included even when their values are identical to data currently in the system. Software or data entry personnel should ignore keys with values identical to current data.</p> <p>It is up to processing software or data entry personnel on the receiving end to determine whether requested changes are allowed or not. For example, Start Date is included as an optional key for a Change action, though it is assumed that once coverage is in effect insurance providers would allow the Start Date to change only under rare circumstances, if ever.</p>
Cancel	None required	No additional data key is required, though some may be present (see the comment for the Change action above). Insurance coverage should be canceled as of the date the request is processed.
Suspend	Suspend date =	Managing suspend/resume data is left up to insurance providers. Coverage may be suspended and resumed more than once in a given training program, so some type of transaction tracking will be necessary to determine actual dates when coverage was in effect.
Resume	Resume date =	Read comment for Suspend action.