Staff Template and Upload Instructions

1. Please fill out all of the columns with information for each staff demographic data point on the excel template.
   a. Unless specifically noted in the Staff Demographic Data Points and Descriptions table below, all columns with an asterisk (*) must contain information for the upload to be completed within the Raven Health application.
   b. Notes:
      i. The default Permissions are Admin and Member. Once application access has been granted, any default Roles and Permissions can be altered by an Admin, or you can create custom Roles and Permissions.
      ii. If the staff member does not have an NPI#, please put 000000
2. Each staff member should be on an individual row.
3. To upload to the application (quickest method), follow these instructions:
   1. Login to the web application (app.ravenhealth.com) from a desktop or laptop
   2. Click on the Menu Pane
   3. Select the Staff Space
   4. Click the Upload Button
   5. Click the Upload Data from File Button
   6. Select your Staff Import File
   7. Follow the Upload Instructions
4. If you prefer, you can have your Raven Customer Success Manager upload the staff file into the application (Estimate a 48-business hour turnaround).
   a. Note: If this option is best for you, please get in touch with your Customer Success Manager for them to set up a HIPAA secure folder for the file upload.

Staff Demographic Data Points and Descriptions		
Demographic Data Point	**Format / Input Options**	**Description**
First Name*	Text	First Name
Last Name*	Text	Last Name
Email*	Text	Email Address
Gender*	(Male, Female, Other)	Gender
Birth Date*	(MM/DD/YYYY)	Birth Date
Permission*	(Member, Admin) (See Permission Breakdown Below)	Level of Access
Position*	(Clinician, Technician, Admin Assistant)	Position
Phone Number*	(###) ###-####	Phone Number
Address Type*	(Home, Work)	Home or Work
Street Address*	Text/Numbers	Street Address
City*	Text	City
State*	Text (State Abbreviation, ex. NY)	State
Postal Code*	Numbers	Postal Code
Credential*	(See Table Below for Options) (ex. RBT)	Credential
Modifier*	(See Table Below for Options) (ex. HO)	Level of Education
License Number*	Numbers	National Provider Identifier #

Credential Options

Credential	Description
RBT	Registered Behavioral Technician
BCaBa	Board Certified Assistant Behavior Analyst
BCBA	Board Certified Behavior Analyst
BCBA-D	Board Certified Behavior Analyst-Doctoral

Billing Modifier Options

Modifier	Description
HM	Less than a bachelor's degree
HN	Bachelor's Degree Level
HO	Master's Degree Level
HP	Psychologist or Doctorate Level

Admin vs Member Level Permissions

Feature	Create	Edit	Delete	View	Assigned*
Organization		A	A	A	
Prompt	A	A	A	A	
Tag	A	A	A	A	
Role	A	A	A	A	
Timesheet	A	A	A	A	
Note Template	A	A	A	A	
Schedule	A/M	A/M	A/M	A/M	M
Client	A	A	A	A/M	M
Treatment Plan	A	A	A	A/M	
Authorization	A	A	A	A/M	
Environmental Factor	A	A	A	A/M	
Document	A	A	A	A/M	
Staff	A	A	A	A	
Assigned Client	A	A	A	A/M	
Report	A	A	A	A/M	
Program	A	A	A	A	

Legend:
- A = Admin Only
- A/M = Admin and Member
- M = Member Only

Notes:
*Assigned Only Permissions: Users can only view the associated entities that are assigned to them.