Ohio Medicaid Enterprise System (OMES), Electronic Data Interchange (EDI)

Trading Partner Management Application User Manual

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Deloitte.

Ohio | Department of Medicaid

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1 Introduction

The Electronic Data Interchange (EDI) Trading Partner (TP) Management Application Solution provides the tools and resources to assist Trading Partners in conducting business electronically with the Ohio Department of Medicaid (ODM). The EDI TP Management Application allows users to:

- Enroll to submit healthcare EDI transactions electronically via a web browser, in compliance with ODM requirements
- Authorize Trading Partners to exchange electronic transactions on behalf of providers
- View and authorize Trading Partners profiles
- Update contact information
- Upload and submit Trading Partner attachments and forms
- Download or view human-readable acknowledgement reports
- Contact EDI technical support

1.1 Purpose

The purpose of the Ohio Medicaid Enterprise System (OMES) EDI TP Management Application User Guide is to assist users in accessing and navigating the application. To easily explain the different features and functionalities of the application, screenshots are provided throughout the user guide.

2 The InnovateOhio Platform (IOP) and Multi-Factor Authentication (MFA)

2.1 Introduction

The EDI TP Management Application component of HealthInteractive™ leverages State of Ohio Security services to provide the appropriate security to application users. In accordance with State of Ohio Security policies, users of the application are required to be defined in the State's InnovateOhio Platform (IOP), which provides access to many applications, including the EDI Trading Partner Management Application. In order to connect, Trading Partners leveraging the EDI Trading Partner Management Application will be required to obtain a State of Ohio ID (OH|ID) and establish Multi-Factor Authentication (MFA) via the State's InnovateOhio Platform (IOP).

The purpose of this additional security is to improve user connectivity, prevent hacking and the inadvertent exposure of sensitive data. The MFA process is well documented, and many providers are already using it in production within other state systems.

2.1.1 New OH|ID & MFA Users

Please refer to the Job Aid titled "Electronic Data Interchange (EDI) Trading Partner OHID & MFA Job Aid" for detailed steps to setup your OHID & MFA.

For additional assistance pertaining to IOP please proceed with one of the following options:

1. Press the CTRL key and click the following link **Help | OH|ID | Ohio's State Digital Identity Standard**
2. Or copy and paste **https://ohid.ohio.gov/wps/portal/gov/ohid/help-center** into your web browser.

2.1.2 Existing OH|ID & MFA Users

Proceed with accessing the EDI Trading Partner Management Web Application.

For additional assistance pertaining to IOP please proceed with one of the following options:

3. Press the CTRL key and click the following link **Help | OH|ID | Ohio's State Digital Identity Standard**
4. Or copy and paste **https://ohid.ohio.gov/wps/portal/gov/ohid/help-center** into your web browser.

3 Accessing the EDI TP Management Application

1. Follow this link to the EDI TP Management Application:
   a. Certification Environment: https://editpp-qa.oh.healthinteractive.net/
   b. Production Environment: https://editpp.oh.healthinteractive.net/EDIPortal

Figure 1 : EDI Trading Partner Management Application Home Page

3.1 New Trading Partner Enrollment

3.1.1 Accessing the New Trading Partner Enrollment Form

1. Once you successfully navigate to the EDI TP Management Application, select **New Trading Partner Enrollment**
   a. *Please note: This step is only for entities who are not already enrolled with ODM. if you are already an authorized trading partner please navigate to section #3.*

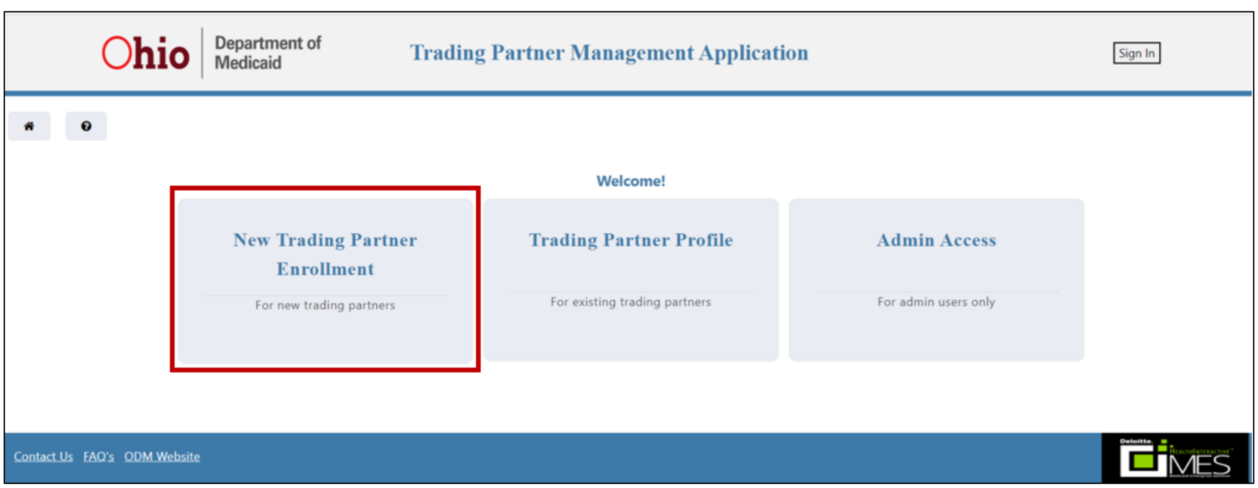

Figure 2 : New Trading Partner Enrollment Tile

2. After selecting the New Trading Partner Enrollment option, please review and agree to the Data Consent Agreement by selecting **OK**

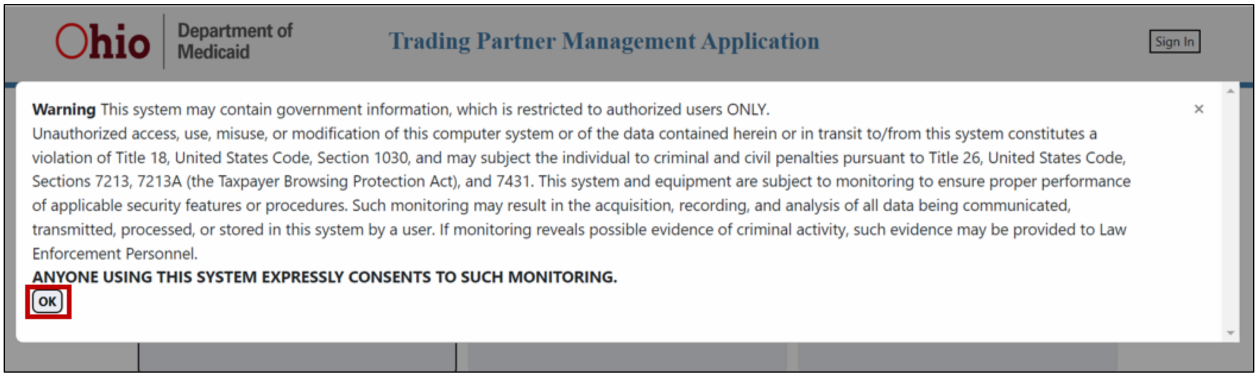

Figure 3: New Trading Partner Enrollment – Data Consent Agreement

3. After agreeing to the Data Consent Agreement, you will be directed to the OH|ID log in page. Please input your OH|ID credentials and select **Log in**

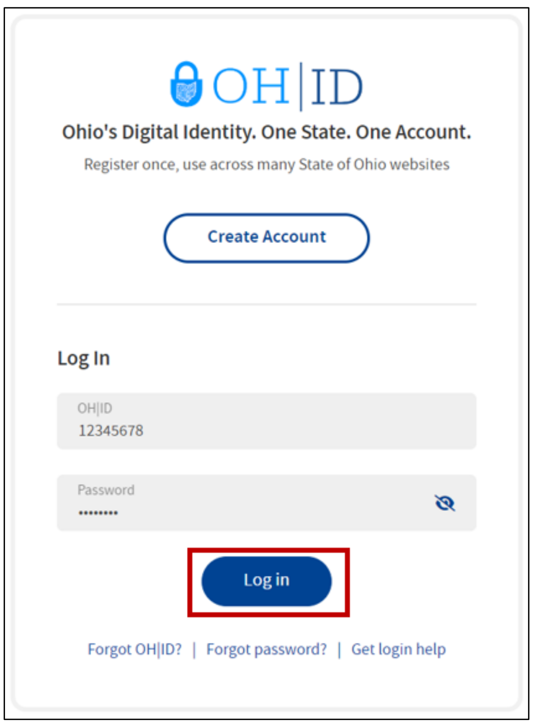

Figure 4 : OH|ID Log in Page

4. If the login to OH|ID is not successful, please select the appropriate option (as shown in the rec box below). Once you have resolved your login issue, please complete step #3 again with valid OH|ID and password credentials

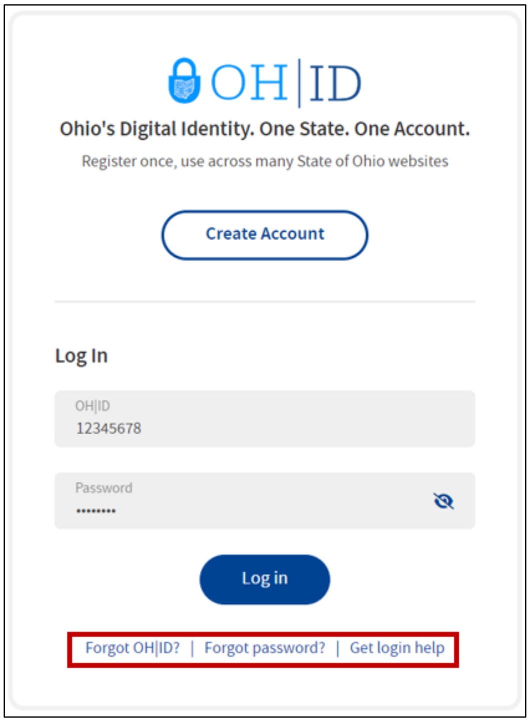

Figure 5 : OH|ID Log in Assistance Options

3.1.2 Completing the New Trading Partner Enrollment Form

Upon successful login you will be led to the Trading Partner Enrollment Form. This form contains three (3) sections.

1. Trading Partner Information - Input the necessary information to complete the form.
    a. **Asterisk indicates a mandatory field.*

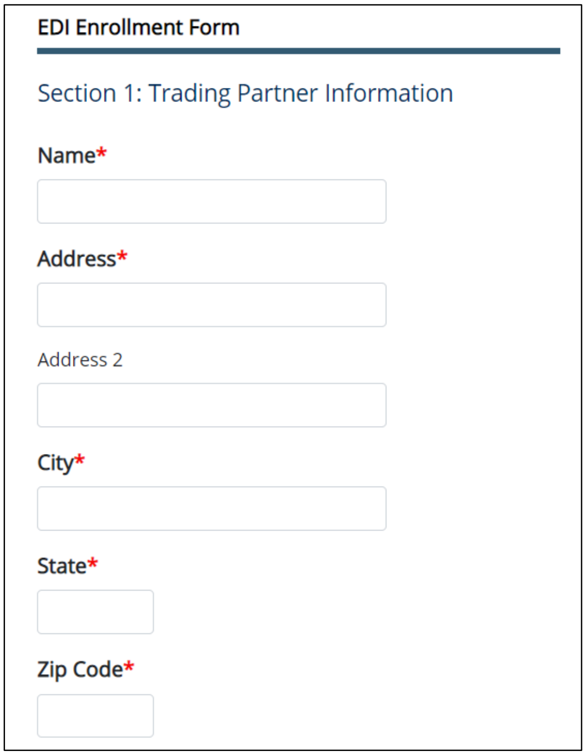

Figure 6 : New Trading Partner Enrollment Form – Section 1 – Trading Partner Information

2. Business Contact Information - Input the necessary information to complete this section of the form.
    a. **Asterisk indicates a mandatory field. All fields within this section are mandatory.*

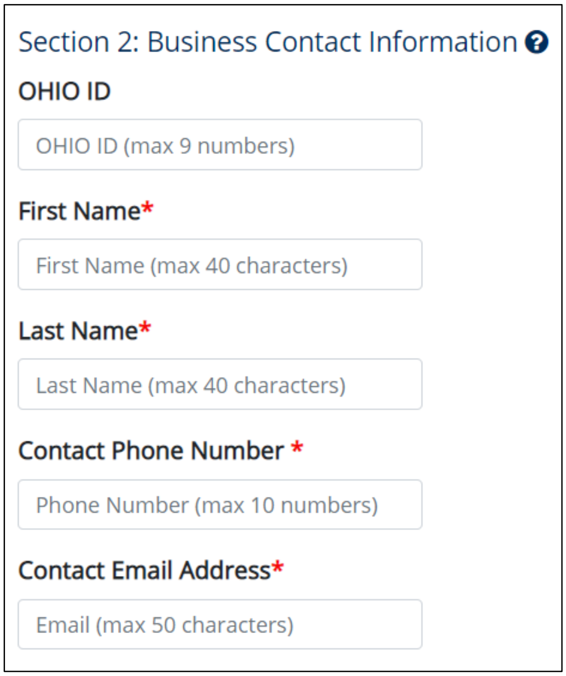

Figure 7 : New Trading Partner Enrollment Form – Section 2 – Business Contact Information

3. Transactions Available for Transmission - These are the batch and real-time transactions available to the trading partner. Please select the transactions that you expect to exchange with Ohio Medicaid Enterprise System (OMES) EDI.
    a. *Please Note: The 834 and 820 transactions are applicable to Managed Care Organizations only.*

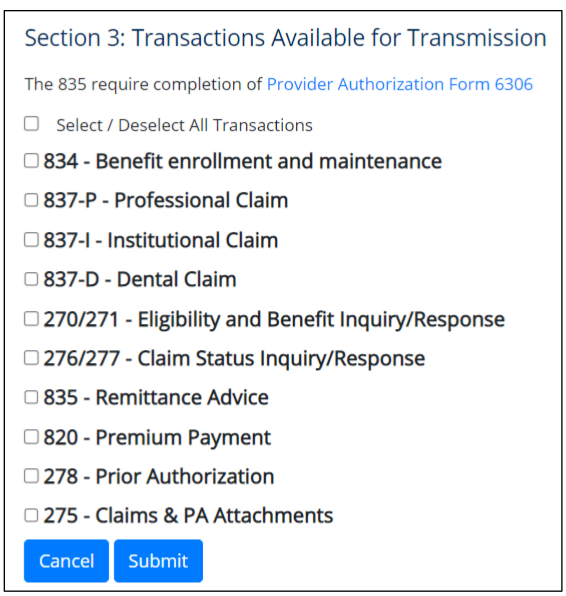

Figure 8 : New Trading Partner Enrollment Form – Section 3 – Transactions Available for Submission

4. Upon successfully entering the necessary information to complete the form, select **Submit**
    a. Selecting **cancel** will not submit your form. Upon selecting **cancel** you will be led back to the EDI TP Management Application Homepage.
5. After selecting **Submit**, please confirm Trading Partner Agreement form message pops up asking the user to complete the form.

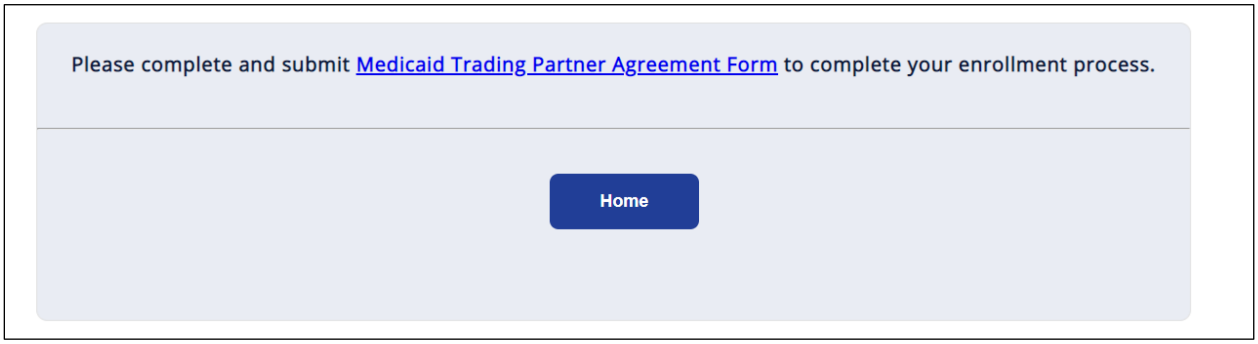

Figure 9 : New Trading Partner Enrollment Form – Completion Request Message

6. Complete the online Trading Partner Agreement and email it to [TradingPartnerAgreements@medicaid.ohio.gov.](mailto:TradingPartnerAgreements@medicaid.ohio.gov)

The Trading Partner Agreement is also available on the ODM website by:

1. Pressing the CTRL key and clicking the following link [TradingPartner-Agreement.pdf (ohio.gov)](https://medicaid.ohio.gov/static/Providers/Billing/TradingPartners/FormsTechLetters/TradingPartner-Agreement.pdf)
2. Or copying and pasting **https://medicaid.ohio.gov/static/Providers/Billing/TradingPartners/FormsTechLetters/TradingPartner-Agreement.pdf** into your web browser.

3.2 Trading Partner Profile

The Trading Partner Profile tile is for trading partners that have successfully completed all the necessary enrollment forms and have been assigned a 7-digit trading partner identification number (TPID) from ODM.

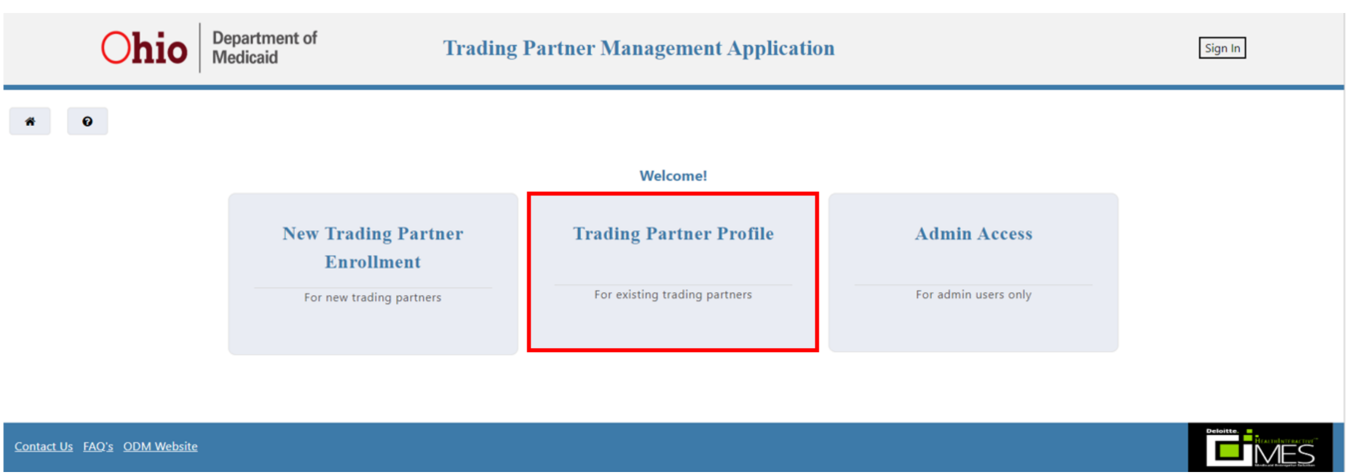

Figure 10 : Trading Partner Profile Tile

From the Trading Partner Profile Page you can:

- Update trading partner contact information (only Business users can perform this functionality)
- Download ODM-06306 and ODM-06305 forms
- Navigate to the Managed File Transfer (MFT) portal by selecting ‘Managed File Transfer
- Upload 275 Attachment documentation for claims
- View providers enrolled with the Trading Partner for the 835 ERA using ‘Trading Partner Associated Providers’
- Upload, view, and access Trading Partner documents

Please Note: *This is the tile you will select if you are already an enrolled trading partner in testing or authorized for production.*

There are four different types of users associated with the Trading Partner Profile Page. Prior to completing the steps below, identify your user type. The different attributes of Business, Secondary, Technical contacts, and Users are shown below. Please note: All users have access to the MFT link to exchange EDI Transactions.

1. Business user – can add or remove secondary, technical, and normal user type. Can also view and edit profile information of all users including themselves
2. Secondary user – can view and edit their own profile
3. Technical user – can view and edit their own profile
4. User – Can only view their profile

3.2.1 Add a User

1. To add a new user, Select **Add User** and a pop-up window will display.

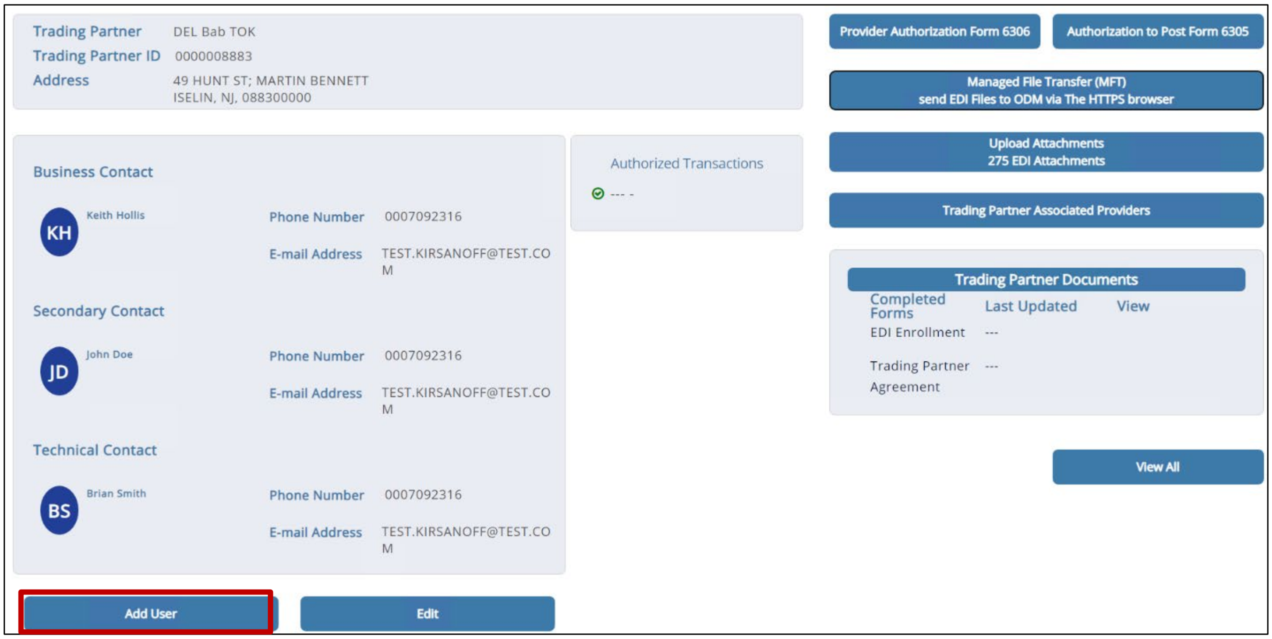

Figure 11 : Trading Partner Profile Page – Add User

2. Enter the necessary new user information to complete the form and select **Add**.
    a. Please note: Selecting **Cancel** will not submit your form. Upon selecting **Cancel** the window will be closed and you will be led back to the Trading Partner Profile page.
    b. **Asterisk indicates a mandatory field.*

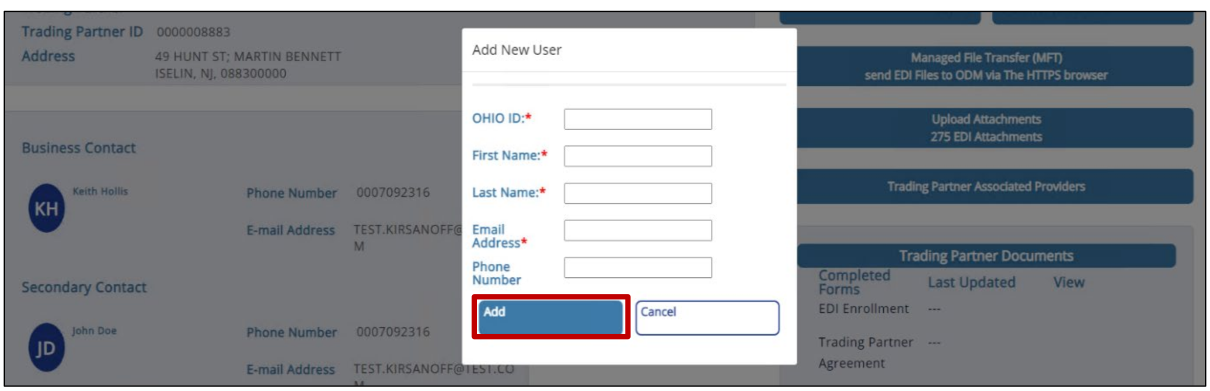

Figure 12 : Trading Partner Profile Page – Add User Popup Modal

3.2.2 Edit a User

1. To edit a user, select **Edit** on the Trading Partner Profile page.

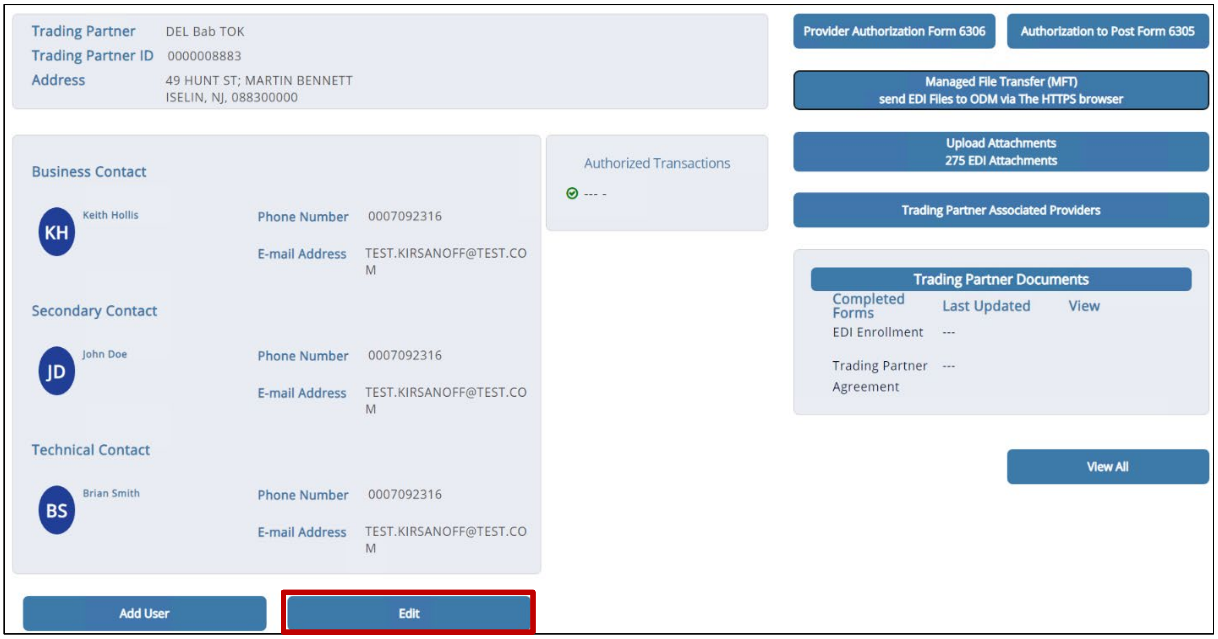

Figure 13 : Trading Partner Profile Page – Edit User

2. Upon selecting **Edit** the information associated with you and other users (access is dependent on user type) will become editable inline, as shown below.
3. Perform the desired edits and select **Save**.
    a. Please note: Selecting **Cancel** will remove your edits. Upon selecting **Cancel** the edit view will be closed and you will not see any changes made within your Trading Partner Profile.

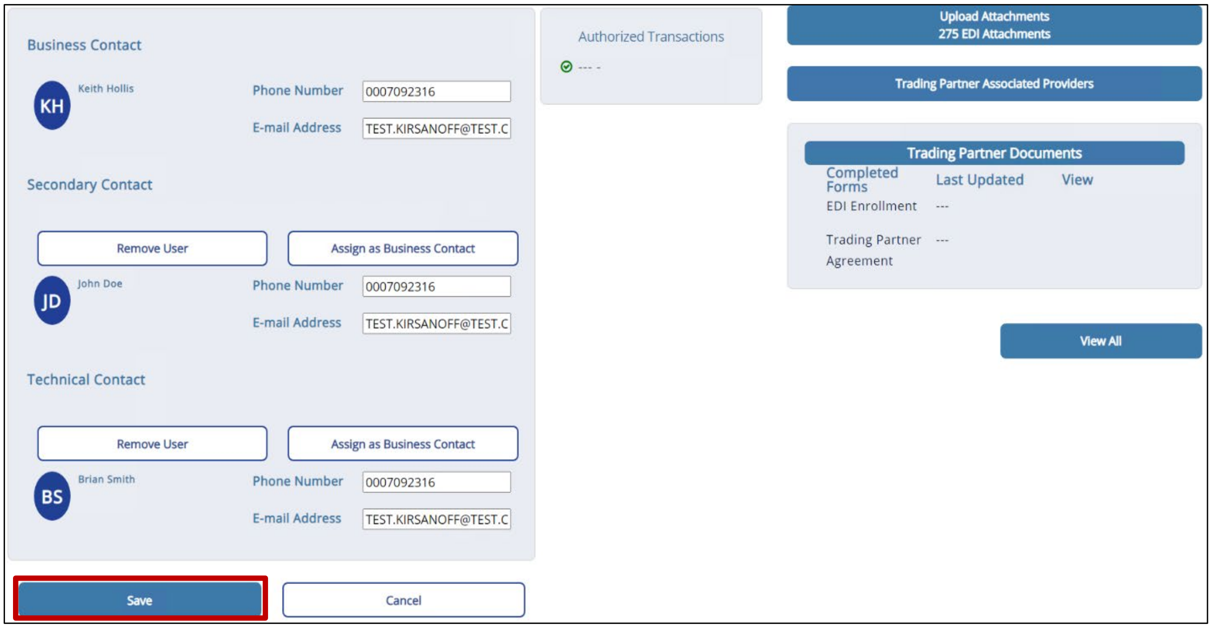

Figure 14 : Trading Partner Profile Page - Edit view

3.3 Admin Access

This tile is reserved for administrative users only and not available for access by trading partners.

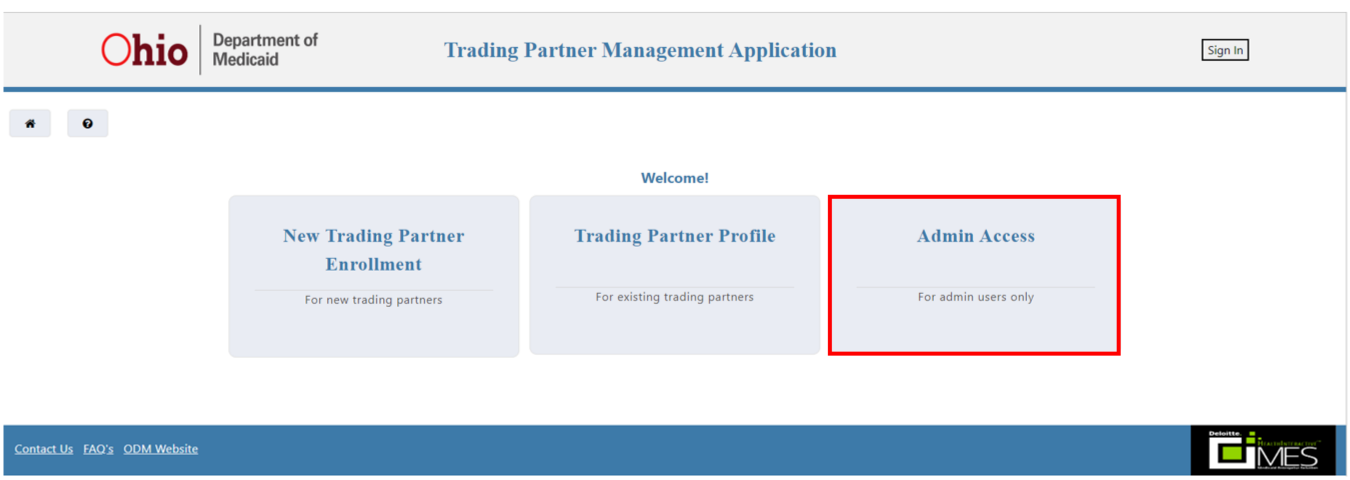

Figure 15 : Admin Access

4 Other Features

4.1 Provider Authorization Form ODM 06306

Providers must complete the ODM 06306 – Designation of an 835 or 834-820 Trading Partner form to authorize an ODM trading partner to receive the 835 Health Care Claim Payment/Advice on their behalf.

1. Click on the Prior Authorization Form 6306 button:

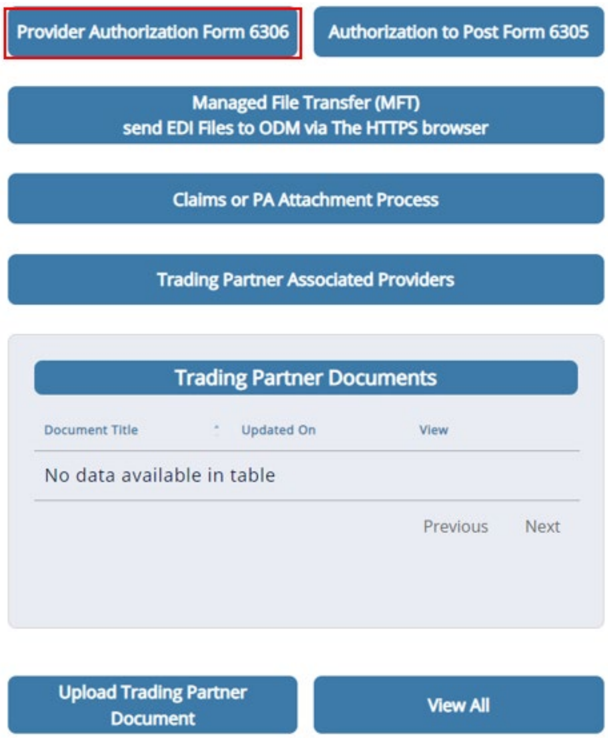

Figure 16 : Trading Partner Profile Page - Prior Authorization Form 6306

2. Download, complete, and sign the form. Then use the Upload Trading Partner Document to submit it.

Ohio Department of Medicaid

DESIGNATION OF AN 835 or 834-820 TRADING PARTNER

By completing and signing this form the provider authorizes the department to transmit member enrollment and remittance advice data in an X12-5010 format through the EDI Trading Partner listed in Section II of this form. *All fields with an (*) are required. Forms missing required information will not be processed. Please include information in other fields if it is available. Current date will be used if the Effective Date is not included.*

SECTION I: PROVIDER INFORMATION

Provider Name:*	Doing Business As Name (DBA):	
Street:*		
City:*	State/Province:*	ZIP Code/Postal Code:*

SECTION II: PROVIDER IDENTIFIERS INFORMATION

Provider Identifiers	Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN):*	National Provider Identifier (NPI):
Other Identifiers	Assigning Authority: **Ohio Department of Medicaid**	Medicaid Provider ID:*
		Trading Partner ID:*

Figure 17 : ODM 06306 Form (partial view)

4.2 Authorization to Post Form ODM 06305

The Authorization to Post form is completed by trading partners to advertise their services to providers in need of a trading partner. This information is posted on the ODM Trading Partner website.

1. Click on the Authorization to Post Form 6305 button

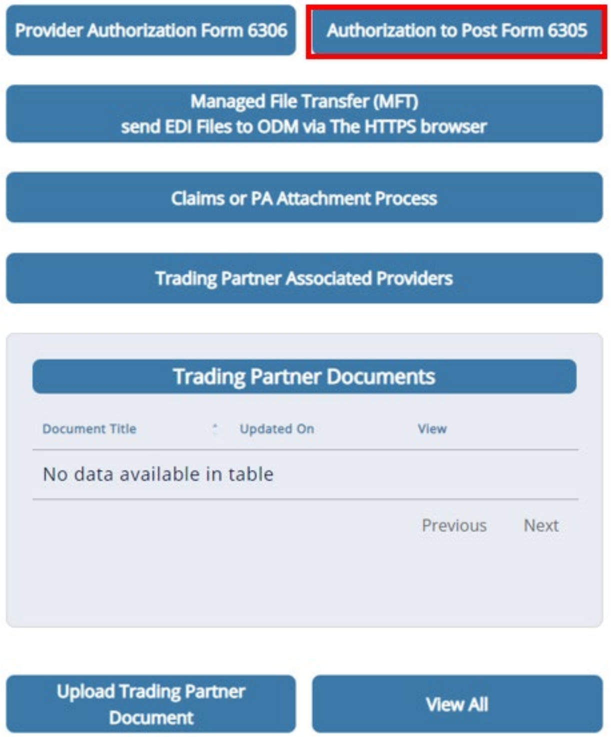

Figure 18 : Trading Partner Profile Page - Authorization to Post Form 6305

2. Download, complete, and upload the Authorization to Post Trading Partner Information form

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AUTHORIZATION TO POST TRADING PARTNER INFORMATION

Date	Company Name		
Seven Digit Trading Partner Number	Contact Person		
Phone Number	Fax Number		
Company Street Address	City	State	Zip Code
Company Website	Contact Email Address		
Signature	Date		

Indicate Authorized Trading Partner List(s) to publish:

☐ 837P *(Professional)* ☐ 837I *(Institutional)* ☐ 837D *(Dental)*

Figure 19 : ODM 06305 Form (partial view)

4.3 MFT Folder Setup, Account Provisioning & File Exchanges

Upon completion of the enrolment process and Trading Partner Agreement form:

1. A Managed File Transfer (MFT) folder will be created for your Trading Partner within the EDI Trading Partner Management Application
2. You will be provisioned access in the MOVEit screen
   a. *For new trading partners, only the access to the Test folder will be given*
   b. *For approved trading partners, access to both Test and PROD folder will be given.*
3. Upon successful access to the MFT Folder, users can start submitting authorized EDI transactions.

The figure below (*ODM EDI MFT Folder Landing page screen*) displays the MFT folder setup for Trading Partners

1. Trading Partners can submit files for transfer by selecting **Upload Files**
2. Trading Partners can receive files transferred to them by selecting **Download**

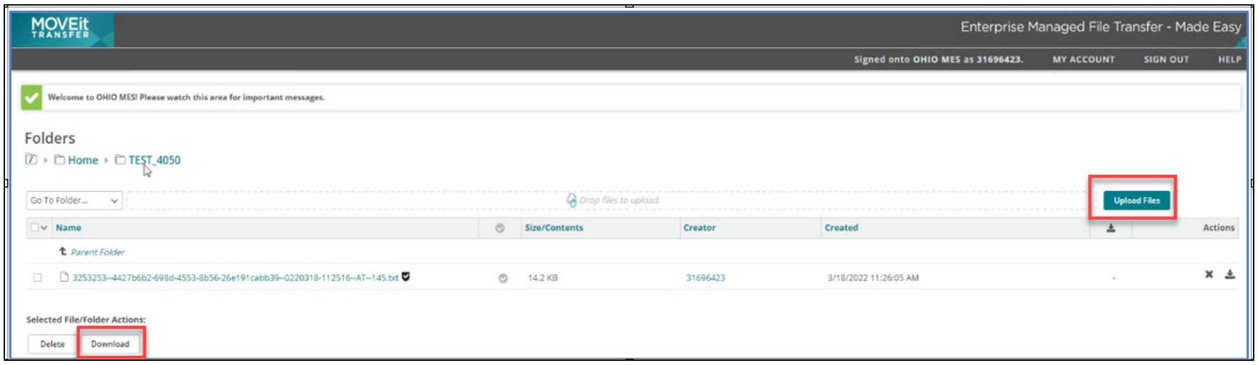

Figure 20 : ODM EDI MFT Folder Landing Page Screen

4.4 Claims Attachment Process

1. As shown in the figure below you can upload EDI 275 documents by selecting **Upload Attachments 275 EDI Attachments** on the Trading Partner Profile page.

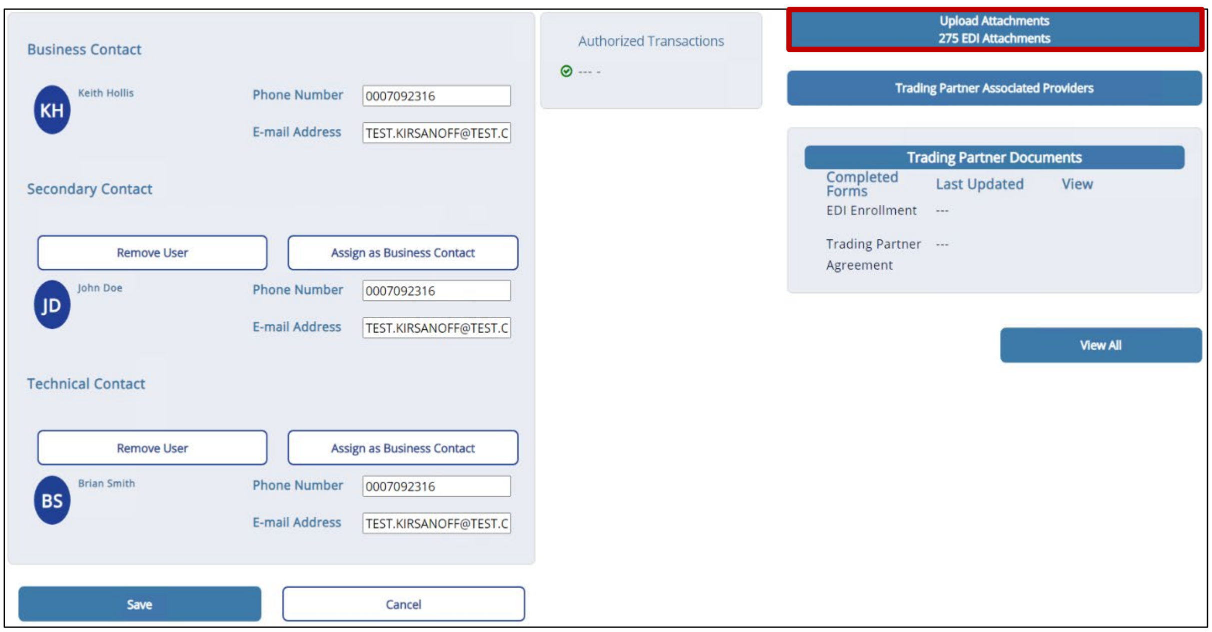

Figure 21 : Trading Partner Profile Page - EDI 275 Attachments

2. After selecting **Upload Attachments 275 EDI Attachments**, you will see the Claim/PA-Attachment Form as shown below. Input the necessary information to complete the form.
    a. **Asterisk indicates a mandatory field. All fields within this section are mandatory.*
    b. Please Note:
        i. **The Member ID** = ODM assigned 12-digit Recipient ID or Medicaid Member ID or value from 2010BA Subscriber Name loop NM109
        ii. **Claim number** = Providers claim identifier from 2300 Loop CLM01
        iii. **Provider ID** = Provider NPI or ODM assigned Provider ID (only when provider does not have NPI)
        iv. **Sender ID** = 7 Digit ODM-assigned Trading Partner ID
3. Select **Submit**, and the portal will give the user the file name to upload.
    a. Selecting **Cancel** will not save any changes on this page. Upon selecting **Cancel** you will be led back to the Trading Partner Profile page.
4. After selecting **Submit,** please proceed to the MOVEit Portal and follow the batch file transfer process to submit your file(s).
    a. For additional information regarding MOVEit please refer to Section #4.

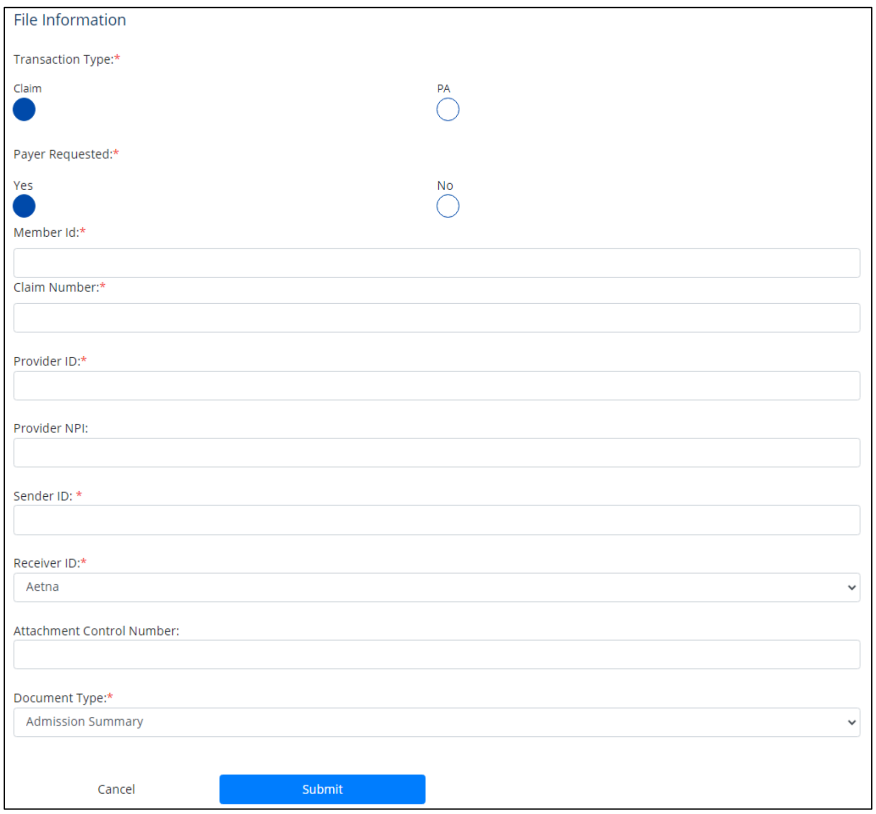

Figure 22 : 275 EDI Attachment Template

4.5 Trading Partner Associated Providers

1. As shown in the figure below users can View their Trading Partner Associated Providers by selecting **Trading Partner Associated Providers** on the Trading Partner Profile page

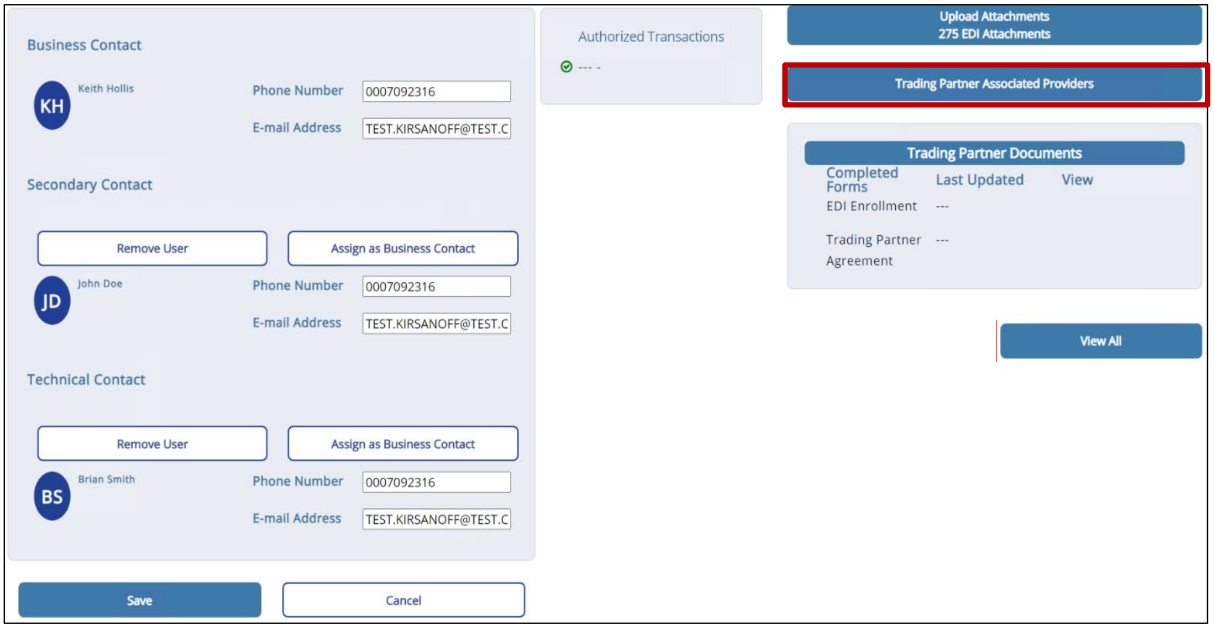

Figure 23 : Trading Partner Profile Page - Trading Partner Associated Providers

2. Upon selecting **Trading Partner Associated Providers** a popup modal containing providers associated with your Trading Partner are displayed. Trading Partners have the ability to search and view the Provider ID and Effective Date from the Trading Partner Associated Providers page.

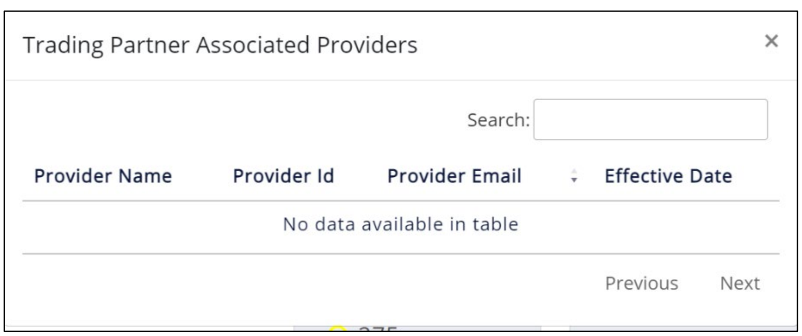

Figure 24 : Trading Partner Associated Providers page

4.6 Trading Partner Documents

Trading Partner Documents provides a list of forms that have been completed and submitted to EDI.

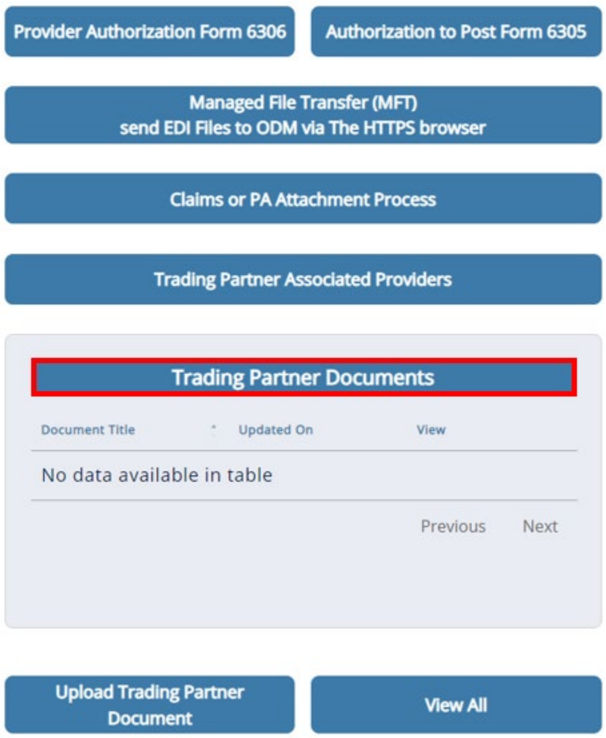

Figure 25 : Trading Partner Profile Page – Trading Partner Documents

4.7 Upload Trading Partner Document

The Upload Trading Partner Document allows trading partner to upload Trading Partner Agreement and the Provider Authorization form 6306.

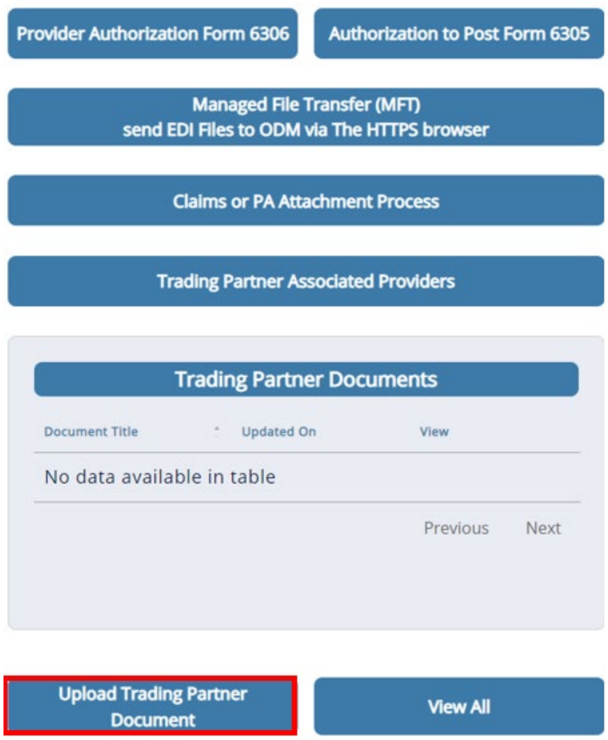

Figure 26 : Trading Partner Profile Page – Upload Trading Partner Documents

1. As shown in the figure below, users complete the required information as indicated by the *, select the Choose File button, browse your computer's system and double-click on the appropriate file, then select the Upload button.

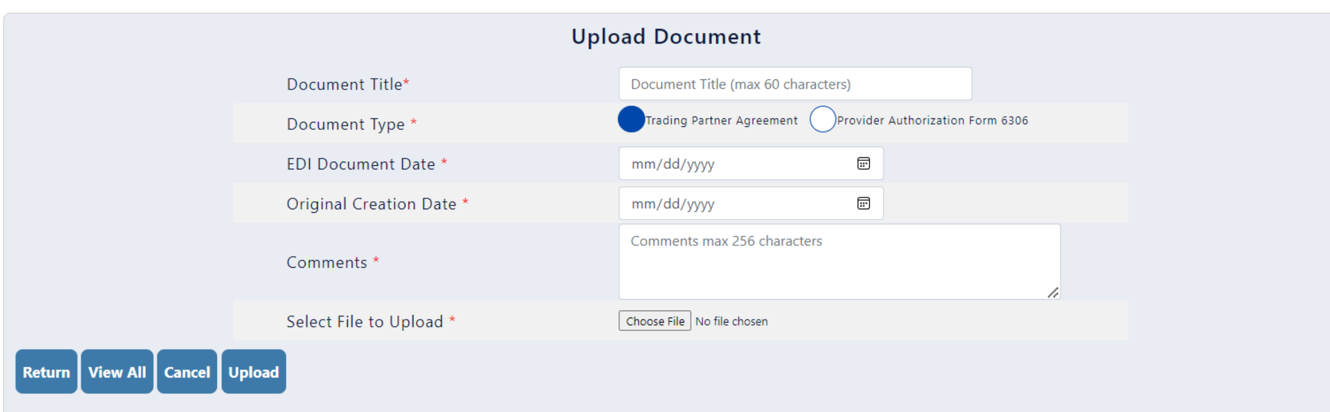

Figure 27 : Upload Document

4.8 View All

1. As shown in the figure below users can view all documents by selecting **View All** on Trading Partner Profile page

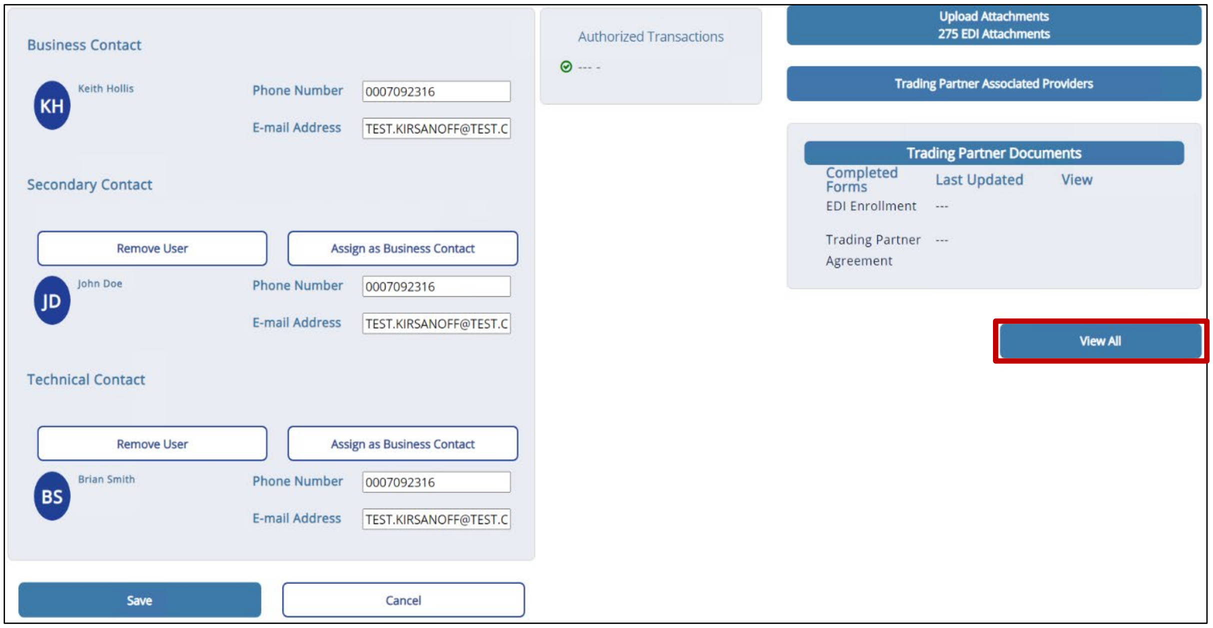

Figure 28 : Trading Partner Profile Page – View All

2. Upon selecting **View All** you are led to the **Document Search Page** where all document uploads associated with your Trading Partner are displayed
3. From the **Document Search Page** you have the ability to
    a. Search
    b. Filter
    c. Select to add a new document

Figure 29 : Document Search Page

5 Appendix: Acronyms List

The following acronyms are used in project documents:

ACRONYM/TERM	DEFINITION
EDI	Electronic Data Interchange
IOP	Innovate Ohio Platform
MFA	Multi Factor Authentication
MFT	Managed File Transfer
ODM	Ohio Department of Medicaid
OMES	Ohio Medicaid Enterprise System

Table 1: Acronyms List