Ohio medicaid enterprise system (OMES), Electronic data enterchange (EDI)

Trading partner information guide

April 26, 2024

Preface

Companion Guides (CG) may contain two types of data, instructions for electronic communications with the publishing entity (Trading Partner Information) and supplemental information for creating transactions for the publishing entity while ensuring compliance with the associated ASC X12 Implementation Guide (IG) (Transaction Instructions). Either the Trading Partner Information component or the Transaction Instruction component must be included in every CG. The components may be published as separate documents or as a single document.

The Trading Partner Information component is included in the CG when the publishing entity wants to convey the information needed to commence and maintain communication exchange.

The Transaction Instruction component is included in the CG when the publishing entity wants to clarify the IG instructions for submission of specific electronic transactions. The Transaction Instruction component content is limited by ASCX12's copyrights and Fair Use statement.

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1 TP introduction

1.1 Purpose

This document is intended to provide information from the author of this guide to trading partners to give them the information they need to exchange EDI data with the author. This includes information about registration, testing, support, and specific information about control record setup.

1.2 Scope

The EDI Trading Partner Information Guide presents the basic requirements for planning and implementing an EDI-based system for the exchange of ASC X12 transactions with or through the Ohio Department of Medicaid (ODM). This guide includes information about connectivity, testing parameters, production authorization parameters, and additional information that the new or experienced trading partner will find useful when starting and maintaining an EDI relationship with the ODM.

The guide is designed to be used in conjunction with the ASC X12 Type 3 Technical Reports (TR3) adopted under HIPAA and other ASC X12 approved transactions. In addition, ODM has developed Companion Guides to be used in tandem with the X12 Consolidated Guides.

Each Companion Guide is intended to convey information that is contained within the framework of the ASC X12 Type 3 Technical Reports (TR3) adopted for use under HIPAA. The Companion Guides are not intended to convey information that in any way exceeds the requirements or usages of data expressed in the ASC X12 Consolidated Guides.

1.3 Overview

The information contained in this guide is meant to provide assistance regarding the electronic submission of health information to ODM. The sole purpose of this document is to provide guidance to entities who wish to become an ODM trading partner. Every effort has been made to assure the information in this guide conforms to current requirements of the law. Each Medicaid provider and trading partner has the ultimate responsibility to follow federal and state laws, including the Ohio Administrative Code (OAC). All users of this guide are advised to review these legal requirements with their legal counsel.

1.4 References

In addition to the resources available on the ODM Trading Partner website at: https://medicaid.ohio.gov/resources-for-providers/billing/trading-partners/trading-partners, there are other websites that contain helpful information to assist in the implementation of the electronic data interchange process. The links to these websites are listed below and are separated by category for easy reference.

1.4.1 EDI basics

For information about EDI software and services, see 1EDI Source, Inc.

1.4.2 Government / associations

- Center for Medicare and Medicaid Services: http://www.cms.hhs.gov
- Answers to Frequently Asked Questions: https://www.medicaid.gov/faq/index.html
- HHS Office for Civil Rights (Privacy) https://www.hhs.gov/ocr/index.html
- WEDI: Workgroup for EDI https://www.wedi.org/
- CMS website for NPI: https://nppes.cms.hhs.gov/#/

1.4.3 ASC X12 standards

- Washington Publishing Company - http://www.wpc-edi.com/
- American National Standards Institute - https://ansi.org/
- Accredited Standards Committee – http://www.x12.org/

1.4.4 Ohio department of medicaid

- ODM web site - http://www.medicaid.ohio.gov/

1.5 Additional information

ODM partners with Deloitte to receive all HIPAA mandated or other approved X12 transactions that are directed to the ODM or to the Ohio Next Generation Managed Care Entities (MCE). Deloitte forwards all response transactions from ODM or the MCEs to the trading partner.

Deloitte is an information services company that provides HIPAA EDI transaction communication, processing, and security services for Ohio Medicaid. The software utilized by Deloitte is optimized for healthcare transactions as defined by HIPAA Transaction and Code Set standards.

All transactions are exchanged via secure transmission using encryption as approved by the Centers for Medicare and Medicaid Services (CMS).

2 Getting started

2.1 Working together

The EDI Support team is available Monday through Friday 8:00 a.m. – 4:30 p.m. (ET/EST) by calling (800) 686-1516 opt. 4 or via email at OMESedisupport@medicaid.ohio.gov.

Entities meeting the definition of a trading partner may enroll and submit EDI transactions recognized by ODM by completing the following as stipulated in OAC 5160-1-20 Electronic data interchange (EDI) trading partner enrollment and testing.

- Create an Ohio ID (OH|ID). The OH|ID is unique for each individual person. The OH|ID is the user ID for any person who accesses any State of Ohio system.
  https://medicaid.ohio.gov/static/Providers/Billing/TradingPartners/EnrollmentTesting/EDI+Trading+Partner+OHID+%26+MFA+Job+Aid.pdf
- Complete new trading partner enrollment through the online Trading Partner Management Application: https://editpp.oh.healthinteractive.net/EDIPortal
- Complete and sign the Electronic Data Interchange (EDI) Trading Partner Agreement http://medicaid.ohio.gov/PROVIDERS/Billing/TradingPartners/RequiredFormsandTechnicalLetters.aspx

NOTE: If at any time the company who enrolls as a trading partner with ODM changes their tax ID, the company we contracted with is a different company and new enrollment, Trading Partner Agreement, testing, etc. will be required.
(Please visit: http://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Do-You-Need-a-New-EIN if you have any questions on this requirement).

2.2 Trading partner registration

An EDI Trading Partner is any entity (provider, billing service, software vendor, employer group, financial institution, etc.) that transmits electronic data to or receives electronic data from another entity.

A trading partner, as defined in the OAC 5160-1-20 (A)(3) "is a covered entity as defined in 42 C.F.R. 160.103 (as in effect October 1, 2021) that submits, receives, routes, or translates EDI transactions directly related to the administration or provision of medical assistance provided under a public assistance program."

A covered entity, as defined in 45 Code of Federal Regulations (CFR) 160.103, is a health plan, a health care clearinghouse, or a health care provider that transmits health care information in an electronic format in connection with a transaction covered by OAC 5160-1-20.

2.2.1 Medicaid new trading partner enrollment

ODM requires that the Medicaid New Trading Partner Enrollment be completed using the Trading Partner Management Application (TPMA). The information requested includes:

- Company name and tax ID
- Primary contact for the trading partner (the person who submits EDI files)
- Secondary contact as a backup for the primary point of contact or as a business contact
- Third contact for technical support (such as a software vendor)
- ASC X12 transaction sets to be exchanged

The information must be provided using the New Trading Partner Enrollment tile on the TPMA: https://editpp.oh.healthinteractive.net/EDIPortal.

Step-by-step enrollment instructions can be found on the following link:
https://medicaid.ohio.gov/static/Providers/Billing/TradingPartners/EnrollmentTesting/OMES+EDI+Trading+Partner+Management+Application+User+Guide.pdf

NOTE: It is the trading partner's responsibility to keep their contact information up to date. Information may be updated using the TPMA as often as necessary. Incorrect contact information will impact your ability to receive alerts or other notifications regarding your EDI business with Deloitte or ODM.

2.2.2 Electronic data interchange (EDI) trading partner agreement (TPA)

An EDI Trading Partner Agreement is a contract between parties who have chosen to become electronic business partners. The EDI Trading Partner Agreement stipulates the general terms and conditions under which the partners agree to exchange information electronically. The document defines participant roles, communication, and security requirements. The agreement can be found here: https://medicaid.ohio.gov/resources-for-providers/billing/trading-partners/enrollment-testing/required-forms-and-technical-letters
Download the agreement and sign the original in blue ink. Scan in color and email as an attachment to: TradingPartnerAgreements@medicaid.ohio.gov .

Once the TPA and the profile are processed, a 7-digit trading partner identification number will be assigned. The contacts provided during enrollment will be notified via email from the OMES EDI Support unit.

2.3   Trading partner testing and authorization process

The test environment replicates the production environment. A test file from a potential trading partner should be created by the same means that the production file is created. EDI testing includes:
- Network connectivity (the communications gateway)
- Standards compliance (EDI translation)
- Business process integrity (applications software)

2.3.1 Transmission files

Trading partners must submit separate transmissions for 837 Professional, 837 Institutional, 837 Dental files, 270 Eligibility Benefit Request and 276 Claim Status Request. Each transaction type is tested separately.

2.3.2 Creating a test file

A test file must contain valid Ohio Medicaid data, in addition to meeting all ASC X12 and HIPAA requirements. ODM recommends submitting claims that have been previously paid by Ohio Medicaid.

2.3.3 Testing

The ODM test cycle includes:
- Connectivity and HIPAA compliance
- Pre-processing
- Adjudication

Tests for connectivity, EDI enveloping, and WEDI SNIP Testing Types 1 - 5, and 7 for the submission of the ANSI ASC X12N 837 Professional, Institutional, and Dental formats. When requested, a TA1 Interchange Acknowledgement as well as the 999 Implementation Acknowledgement is returned for file acceptance or rejection. This page has more information on the WEDI SNIP validations: https://medicaid.ohio.gov/resources-for-providers/billing/trading-partners/omes-golive
A rejected status (R) means that the entire file has failed translation (rejected for fundamental X12 or HIPAA errors), and needs to be reviewed, corrected, and resubmitted. None of the claims in a rejected file will be processed.
The partial acceptance of a file with more than one ST/SE transaction set is possible and is represented by a 'P' in the AK5 and AK9 of the 999. An HTML file will also be returned for rejected and partially accepted files. An ST / SE transaction set may also be accepted with errors indicated by an 'E' in the AK9. Receipt of a "P" in the 999 requires correction of the original claim and resubmission. Assistance on identifying and correcting rejected claims should be directed to the EDI support team at omesedisupport@medicaid.ohio.gov or by calling (800)

686-1516 opt. 4.

SNIP Type 7 editing tests for general information, such as an invalid or missing submitter ID, an invalid recipient or provider ID, missing affiliations between a Billing and Rendering provider, a date of service after the file date of submission, etc., that would cause a claim to fail adjudication.

If these types of errors are encountered an 824 Application Advice will be returned.

Claims not rejected in the prior steps will continue to pre-processing. In pre-processing the claim file is sent to the Fiscal Intermediary (FI). The FI applies additional edits such as ensuring a member or provider is active on the date of service (DOS) of the claim. Each claim that reaches pre-processing will receive an accepted or rejected status on the 277 Claim Acknowledgement (277CA) transaction. Accepted claims will include an ICN. Rejected claims will not move to test adjudication and must be corrected and resubmitted.

Test adjudication applies detailed Medicaid edits to determine if a claim would be paid or denied in production. An 835 Remittance Advice <u>can be</u> returned to the submitter of the file <u>if</u> the submitter has notified the EDI support team of the billing provider NPIs being used during testing. No payments are issued during testing.

It is highly recommended that the trading partner review all denied claims in the corresponding 835 remittance advice to determine the cause of any denials. A 'paid' rate of **90%** or greater of the claims submitted will be considered a valid test file. Test adjudication is meant to replicate production results as closely as possible.

2.3.4 Testing information for <u>835 only</u> trading partners

An entity requesting to receive the 835 Remittance Advice only must submit all of the forms in order to become a trading partner with ODM as specified in the Getting Started section of this guide. A seven-digit Ohio Medicaid trading partner number will be assigned to be used as the Receiver ID in the transmission process.

2.3.4.1   Notification by ODM

When the Medicaid New Trading Partner enrollment and Trading Partner Agreement are received by the department, testing can begin.

- An OH|ID will need to be obtained for 835 Only trading partners
- EDI Support will notify you with a User ID and password and assist in the initial log in to the system.
- ODM will send a test 835 file to your mailbox. This file should be used to ensure you are ready to receive a production 835 file.
- When you are confident that the 835 file can be translated correctly, contact OMESedisupport@medicaid.ohio.gov and inform the unit of your production readiness.
- Complete one ODM 06306 form for each pay-to /bill-to provider for which you will be the 835 designee.

2.3.5 Testing information for managed care entities to receive the 834-820 monthly member roster and premium payment transactions

Managed care organizations that must receive the 834-820 Monthly Member Roster/Premium Payment Advice must submit all of the forms to become a trading partner with ODM, as specified in the Getting Started section of this document. A seven-digit Ohio Medicaid trading partner number will be assigned to be used as the sender/receiver ID in the transmission process.

Your primary contact will be notified via email when all of the required forms are submitted to the EDI Support unit. Complete instructions for connectivity, testing, and moving to production will be provided.

3 Testing and certification requirements

3.1 Testing requirements

3.1.1 Connectivity and HIPAA compliance testing parameters

- At least three files per transaction type. (837 Professional, 837 Institutional, 837 Dental) (OAC Rule 5160-1-20, Paragraph C-2-a)
- Each 837 transaction must have a minimum of 50 claims. (OAC Rule 5160-1-20, Paragraph C-2-c)
- All EDI files must completely pass X12 integrity testing. This checks basic X12 syntax. (OAC Rule 5160-1-20, Paragraph C-2-e)
- All EDI files must completely pass HIPAA syntactical requirement testing. This checks for syntax specifically related to HIPAA TR3 guidelines. (OAC Rule 5160-1-20, Paragraph C-2-e)
- All EDI files must completely pass HIPAA situation testing. This checks to make sure all interdependent elements are present. (OAC Rule 5160-1-20, Paragraph C-2-e).

3.1.2 Pre-processing testing parameters

- Type of Service - A representative sampling of your business claims (types of service such as Ambulance, Home Health, Laboratory, Transportation, etc.) should be contained in the test file. (OAC Rule 5160-1-20, Paragraph C-2-b)
- Additional Transaction Sets - A trading partner must be able to successfully receive and translate the 277 Claim Acknowledgement (277CA), the 824 Application Advice, the TA1 Interchange Acknowledgement and the 999 Implementation Acknowledgement transaction sets. The 835 Electronic Remittance Advice is optional but recommended.
- Frequency of Test File Submission – Only one file per day per transaction type (one Professional, one Institutional, and one Dental) should be sent for processing. (OAC Rule 5160-1-20, Paragraph C-2-f)
- Re-submission – A file can be re-submitted using the same claims until 90% of the claims submitted pass adjudication testing. This percentage must be reached for every transaction type being tested. (OAC Rule 5160-1-20, Paragraph D-5)
- Testing is Complete – When three files of each transaction type have been fully tested (end-to-end), each file passing test adjudication with no more than a 10% denial rate.

3.2 Certification requirements

The Ohio Department of Medicaid does not certify Trading Partners or the software they choose to use. Trading Partners are authorized to submit/receive Medicaid related transactions once they have successfully completed testing.

3.2.1 Completing testing successfully

Successful completion of testing is confirmed via an email from the EDI Support team to the contacts provided in the original enrollment.
Once testing has been successfully completed and a production account is ready, the EDI Support unit will contact the trading partner to begin submitting files for production.
Completion of testing includes the approval to exchange transactions for members covered under the fee for service (FFS) program as well as transactions for members covered by the MCEs.

3.2.2 Moving to production

The OMES EDI Support team will notify trading partners with a begin date to submit production files using electronic data interchange once the requirements outlined below are complete:
- Meet all testing criteria (OAC Rule 5160-1-20, Paragraph C-1).

- The production process is designed to electronically accommodate the trading partner's regular submission of claims to ODM from delivery through adjudication.
- A payment is issued to the provider according to the regular payment schedule. The ODM fee for service EDI processing calendar can be found here: https://medicaid.ohio.gov/resources-for-providers/billing/trading-partners/production/production-features

Note: There is not a minimum number of claims per file once a TP has moved to Production. However, there is a maximum of **5000** claims or inquiries allowed per transaction. Files exceeding this number may not receive a response.

3.2.3 Designation of 835 trading partner (ODM 06306)

The ODM 06306 form is only required if the trading partner plans to receive the 835 remittance advice on behalf of their provider clients. A separate form for each bill-to/pay-to provider is required but not for each managed care entity.   The form can be found on the ODM website: Trading Partner Enrollment and Testing (ohio.gov).

The ODM 06306 form is CAQH CORE compliant with enrollment data rule version PR.1.0.
Please read all instructions (ODM 06306i). Forms that are not completed correctly will not be processed.

4 Connectivity / communications

4.1 Process flows

837 Process Flow

TA1 may be returned before processing takes place if the file encountered invalid interchange structure in the ISA/GA and IEA/GE segments

TA1 returned for invalid interchange errors

Trading Partner submits 837 file

837 files can be Professional, Institutional, or Dental

HTML report is returned with all rejected 999s AND 999 Acknowledgment is generated. No claims enter system

File passes HIPAA compliance

No

HIPAA compliance means that the file passes the edits for a complete X12 5010 file

999 can be partially accepted and partially rejected if there is more than one ST / SE grouping within a file.

Yes

999 Acknowledgment is generated

999 response usually happens within an hour after submission

824 rejected claims report sent to Trading Partner

Fails

Additional validation of Payer requirements (SNIP 7)

Pre-processing validates provider, sender, recipient, and receiver IDs as well as performs a check digit on all NPIs to make sure that they are valid.

824 TED07 contains a copy of the 'bad data' or the data that caused the rejection.

824 is returned 24 – 48 hours after the 837 file submission

Passes

If a file passes pre-processing validation no 824 is generated

File sent to ODM or MCE for adjudication

277CA report sent to Trading Partner to report claim(s) status

The 277CA provides the assigned ICN for each claim accepted in a TP file.

835 remittance advice sent to the providers designated Trading Partner the week following the payment cycle

The 835 Electronic Remittance Advice is sent to provide payment information and other details about each claim adjudicated in the prior week processing.

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270/276 Process flow (Batch mode)

TA1 may be returned before processing takes place if the file encountered invalid interchange structure in the ISA/GA and IEA/GE segments

TA1 returned for invalid interchange errors

Trading Partner submits 270 or 276 file

HTML report is returned with all rejected 999s

AND

999 Acknowledgment is generated.

No

File passes HIPAA compliance

HIPAA compliance means that the file passes the edits for a complete X12 5010 file

Yes

999 can be partially accepted and partially rejected if there are more than one ST / SE transaction

999 Acknowledgment is generated

270/276 eligibility inquiry or claim status look up is performed

271/277 eligibility response or claim status response is created

271/277 responses are sent to the Trading Partner

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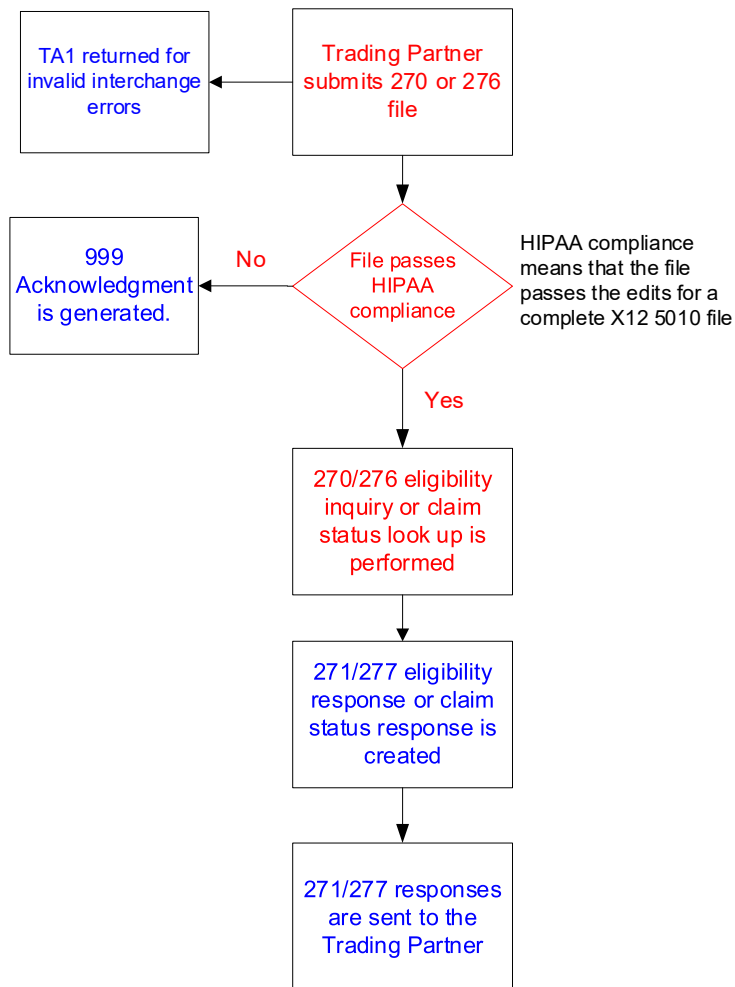# 270/276 Core process flow (Real-time)

TA1 may be returned before processing takes place if the file encountered invalid interchange structure in the ISA/GA and IEA/GE segments

TA1 returned for invalid interchange errors ← Trading Partner submits 270 or 276 file

999 Acknowledgment is generated. ← **No** — File passes HIPAA compliance

HIPAA compliance means that the file passes the edits for a complete X12 5010 file

Yes

270/276 eligibility inquiry or claim status look up is performed

271/277 eligibility response or claim status response is created

271/277 responses are sent to the Trading Partner

03/20/2024 SS

4.2   Transmission administrative procedures

Deloitte provides the communication protocol that ensures the security and privacy of ePHI data being transmitted to ODM by its trading partners over the Internet.

In order to provide the greatest flexibility without compromising security, options for establishing connectivity with OMES EDI are as follows:

- Secure File Transfer Protocol (SFTP) – SFTP is a secure version of the original FTP protocol which facilitates data transfer over a Secure Shell (SSH).
- CAQH CORE – Submission of real time and batch transactions using either SOAP+WSDL or HTTP MIME Multipart standards. This is consistent with the CORE Rule 270. In both cases, the communication protocol is HTTPS. The data is encrypted to allow safe transmission over the public Internet.
- HTTP Browser through Trading Partner Management Application (TPMA) – TPMA is an EDI portal that manages trading partner profiles and provides the capability to upload and download HIPAA compliant X12 files through a web browser.

4.2.1 Re-transmission procedures

ODM does not change, alter, delete, resubmit or otherwise modify data as received from a trading partner using EDI. Re-transmission must be performed by the trading partner.

4.3   Communication protocols

Detailed information on communication protocols and for establishing connectivity to OMES EDI can be found in the Connectivity Form located on the ODM website: Trading Partner Enrollment and Testing (ohio.gov).

4.4   Security protocols

Secure File Transfer Protocol (SFTP) batch transfers and CAQH CORE connectivity protocols take place on secure channels to protect the communication. Service accounts are established to authenticate the users with the completion of the Connectivity Form referenced above.

Trading partner that choose TPMA to exchange EDI files must create a user profile utilizing IOP (Innovative Ohio Platform). IOP provides enterprise Identity and Access Management services and is used to provide user provisioning, secure authentication, and Single Sign On to various integrated OMES EDI applications, including TPMA. Further information on IOP can be found in the OH|ID MFA Job Aid located here: Trading Partner Enrollment and Testing (ohio.gov).

> **Note:** The contact information for your company must be current in order to have the ability to update communication protocols. Whenever the contact person(s) for your company is changed, please send notification to the omesedisupport@medicaid.ohio.gov to prevent delays in file submission or retrieval.

5 Contact information

5.1 EDI customer and technical assistance

Customer Service is available Monday through Friday 8:00 a.m. – 4:30 p.m. (ET/EST) by calling (800) 686-1516 option 4 or via email at OMESEDISupport@medicaid.ohio.gov

5.2 Provider services

For provider enrollment inquiries or other billing issues, contact the Integrated Help Desk at:
Phone: 800-686-1516 and follow the appropriate prompts.

5.3 Applicable websites / e-mail

Ohio Department of Medicaid web site - http://www.medicaid.ohio.gov/
ODM Trading Partner web site - Trading Partners (ohio.gov)

6 Control segments / envelopes

Electronic envelopes control and track communication between trading partners. One envelope may contain many transaction sets grouped into functional groups. ODM expects one functional group (GS) per outer envelope (ISA) as defined by the GS08 element. For more information, see the ODM Companion Guides for trading partners: [Companion Guides | Medicaid (ohio.gov)](#).

ODM accepts the standard delimiters as defined by the ANSI standards. The delimiters in the table are recommended.

Delimiter	Character Name	Character
Data Element Separator	Asterisk	*
Sub-Element Separator	Colon	:
Segment Terminator	Tilde	~
Repetition Separator	Carot	^

6.1   ISA-IEA

The ISA segment is the beginning, outermost envelope of the Interchange Control Structure. It contains authorization and security information. ODM does not require authorization and security information in the ISA. The ISA also identifies the following:

- Sender
- Receiver
- Date and Time
- Interchange Control Number
- Version
- Control Identifier
- Test or Production Flag
- Sub-element separator.

> **Note:** The Interchange Control Number (ISA13) must be unique from each Trading Partner. The Test or Production Flag (ISA15) must be a **T** for Test. Only use **P** for Production.

For more information about the ISA segment, see the [ODM Companion Guides](#).

6.1.1 Example of the ISA segment for a test file

ISA*00*..........*00*..........*ZZ*7.DIGIT.ID.....*ZZ*MMISODJFS......*031016*2300*^*00501*000000001*0***T***:~

6.1.2 Example of the ISA segment for a production file

ISA*00*..........*00*..........*ZZ*7.DIGIT.ID.....*ZZ*MMISODJFS......*031016*2300*^*00501*000000002*0***P***:~

6.2   GS-GE

The GS segment identifies the collection of transaction sets that are included in the Functional Group. The GS segment identifies the following:

- Functional Group
- Sender
- Receiver
- Date and Time
- Functional Group Control Number

The GS08 identifies the type of transaction sets contained within the Functional Group envelope. ODM expects only one type of transaction set within a GS envelope. The GS-GE requirements are defined in the [ODM Companion Guides](#).

6.3   ST-SE

The transaction set identifier uniquely identifies the transaction set. The value for the transaction set control number, in the header and trailer control segments must be identical for any given transaction. The value for the number of included segments is the total number of segments in the transaction set including the ST and SE segments. The Transaction Set Control Number (ST02, SE02) shall be unique within a given functional group envelope (GS/GE).

7 Acknowledgements and reports

7.1 ASC X12 acknowledgments

7.1.1 TA1 – Interchange acknowledgment

The TA1 validates information populated in the interchange header (ISA/GS) and trailer (IEA/GE) segments of the file envelope. It allows the receiver of a file to notify the sender that an invalid interchange structure was received or that problems were encountered.

7.1.2 999 – Implementation acknowledgement for health care insurance

This transaction set is used to acknowledge acceptance or rejection and report errors in a transmitted file. A code indicating an accepted, partial accepted or rejected condition based on syntax editing will be returned. In the event that a file fails X12 validation, the 999 will be returned to the sender with a rejected status and include information helpful in locating the invalid data.

For every correctly formatted document inbound to ODM, a transmission acknowledgment document will be sent to the trading partner. The sender is responsible for reviewing the 999 for an accepted, partial accepted or rejected status. For every document outbound from ODM, a transmission acknowledgment document is not expected to be received from the trading partner.

7.1.3 824 – Application advice

An 824 Application Advice is generated and sent when an inbound 837 transaction fails pre-processing for adjudication. Common errors for which an 824 is sent include, but are not limited to, submitter or pay-to provider not found in the ODM master file, rendering provider not found in the master file, a date of service after the date of file submission. It is strongly suggested that trading partners watch for and process the 824 files when they are in the trading partner's out mailbox. In some instances, this will be the only way a trading partner will know that all claims for a particular provider have been rejected.

7.1.4 277CA – Accepted claims and rejected claims

A 277 Claim Acknowledgement will be generated and sent when claims transmitted in an inbound 837 transaction pass pre-processing for adjudication. It is strongly suggested that trading partners watch for and process the 277CA files when they are in the trading partner's out mailbox. The 277CA file will enable the trading partner to reconcile the claims sent to ODM and the MCEs. The 277CA file will contain the ODM or MCE assigned Interchange Control Number (ICN) that will assist the provider in reconciling their original 837 claim submissions.

7.2   Report inventory

HTML report will be generated and sent to the trading partner which reflects all rejected and partially accepted 999 Implementation Acknowledgement transactions. The HTML will assist the trading partner in determining the reason for the rejection, including identifying the line(s) where the error(s) occurred within the transaction set.

8 Additional trading partner information

8.1 Implementation checklist

☐ Review the ODM Trading Partner Information Guide

☐ Review the HIPAA published X12 Type 3 Technical Reports (TR3) on the [Washington Publishing Company's](#) website.

☐ Review the [ODM Companion Guides](#)

☐ Coordinate the testing strategy with your internal IT and business units.

☐ Submit the Medicaid Trading Partner Profile form by completing the Trading Partner Enrollment process: https://portal.ohmits.com/Public/Trading%20Partners/tabId/93/Default.aspx

☐ Complete and submit the Trading Partner Agreement as instructed: http://medicaid.ohio.gov/PROVIDERS/Billing/TradingPartners/RequiredFormsandTechnicalLetters.aspx

☐ Complete mapping and coding requirements for selected translator software.

☐ Verify your Medicaid Trading Partner Number. This number will be your Sender/Receiver ID.

☐ Verify password(s) and IDs for connectivity as outlined in the Connectivity Information section of this guide.

☐ Provide a list of Medicaid Provider numbers you intend to use for testing to the EDI Support team. (A maximum of 5 providers is recommended).

☐ Generate and submit EDI data for end-to-end testing in the test environment. Test files should contain a minimum of 50 claims. A maximum of 500 claims is recommended.

☐ Verify your 999 Implementation Acknowledgement, U277 claim status, 824 Application Advice (if applicable) and 835 Remittance Advice.

8.2 Frequently asked questions

Please visit the EDI FAQs on the Trading Partner website: [OMES Trading Partner FAQ (ohio.gov)](#)

8.3 Other resources

The main page for all trading partner information can be found here: [Trading Partners | Medicaid (ohio.gov)](#)

9 Change summary

Version	Date	Section(s) changed	Change Summary
1.0	04/26/2024	Initial Creation using X12 template	N/A