



CORE PHASE I CERTIFICATION TESTING USER MANUAL

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PREFACE

CORE Certification testing involves specific key objectives defined in the CORE Phase I Rules and Policies document (see http://www.caqh.org/CORE_step_by_step.php) that you must demonstrate to receive certification. *You should read the document in its entirety before beginning the process of CORE certification testing.*

INTRODUCTION

Claredi's CORE Certification Testing product has been designed to follow the CORE Phase I Rules and the requirements for achieving the CORE Seal. Before you begin, you must familiarize yourself with the CORE Phase I Rules and Certification requirements.

Claredi's CORE Certification Testing product has been designed to follow the CORE Phase I Rules and the requirements for achieving the CORE Seal. The following steps will assist you in successfully getting started with your CORE Certification testing.

1. Before you begin, you must familiarize yourself with the CORE Phase I Rules and Certification requirements.
2. Claredi's CORE Certification Testing product follows each of the sections outlined in the CORE Phase I Certification Testing Suite.pdf. CORE Certification testing for the CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules requires you utilize the CORE Master Test Bed created by CORE. Download the CORE Phase I Certification Testing Suite.pdf, the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf and the CORE Master Test Bed Data in both wrapped and unwrapped formats. The CORE Certification Testing Suite Version 1.0.0 Supplement.pdf contains instructions on how you are to utilize the CORE Master Test Bed data for populating your databases for CORE Certification testing.
3. It is recommended that you download the User Manual for this site as it will provide you with additional assistance in guiding you through your CORE Certification testing efforts.
4. Once you are familiar with the CORE Certification testing documentation, you will need to customize your account with appropriate identifiers, passwords, delimiters, etc in your Trading Partner Profile .
5. During testing, if you would like Claredi's Customer Support staff to have access to your account, please check the *Allow Claredi Customer Support access to my account* box on the Support page of the interface.
6. CORE Pre-Certification Testing
The CORE Pre-Certification Testing area is an optional area that allows you to pre-test your system using the CORE Test Bed Data prior to beginning your CORE Certification testing. This area only tests the CORE Phase I 270/271 Data Content rules. You may also continue to use this area after you have completed your CORE Certification testing to ensure your system retains its capabilities. Testing done in this area does not apply towards CORE Certification



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testing results, nor are you required to pre-test your system through this area.

7. CORE Certification Testing

The CORE Certification Testing area allows you to test your system using the CORE Test Bed Data for all the test scripts required to apply for your CORE Seal. You must complete all of the tasks in the CORE Certification Testing area successfully prior to applying for your CORE Seal. You may also continue to use this area after you have completed your CORE Certification testing to ensure your system retains its capabilities.

8. Production Testing

The Production Testing area is an optional area that is accessible once you have successfully completed your CORE Certification Testing. This area will allow you to test your system's capability of conforming to the CORE Phase I 270/271 Data Content Rules using your own production data. The Production Testing area also contains additional test scripts for some of the CORE Phase I 270/271 Data Content Rules that are not required for CORE Certification testing. You may also continue to use this area after you have completed your CORE Certification testing to ensure your system retains its capabilities. Testing done in this area does not apply towards CORE Certification testing results, nor are you required to test your system through this area.

9. We always want your input. Use the Feedback form (click the Feedback link in the left menu of the interface) to help us help you better.

10. The Logout option is available from the left side menu as well as at the top right-hand corner of all screens for your convenience.

11. Click the Getting Started link in the left menu after you log in for more information.

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CHAPTER 1: GETTING STARTED

The first step is to create your account so you can access the CORE Certification Testing functionality.

CREATING YOUR ACCOUNT

To create your CORE Certification Testing account, follow the steps below.

To Create Your CORE Certification Testing Account

1. Open a browser and go to <https://core.claredi.com/> (Figure 1.1).

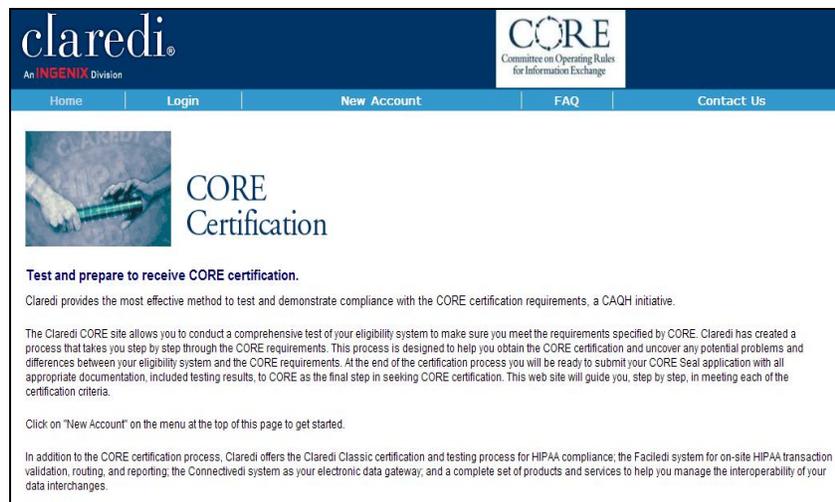


Figure 1.1

2. Click on the **New Account** link in the top toolbar. This displays the **Open a New Account** page (Figure 1.2).

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Open a New Account

Welcome! To help you get started creating your CORE-Certification account we need you to provide some information. This information will be used to create the type of account that will best suit your needs and to adjust the requirements for your CORE-Certification process. Please enter the information below. If you have questions or problems, please feel free to call Customer Support at (866) 444-0339, option 5.

Before you begin, you must familiarize yourself with the [CORE Phase I Rules and the requirements for achieving the CORE Certification](#).

Please download and review the 'Creating Your Account' section in the **User Manual** prior to opening a new account.

[Click here](#) for the **User Manual** for this site.

Select the CORE-Certification type your organization is seeking.

Company Type:	<input type="text" value="CORE Certification - Clearinghouse"/>
	<input type="text" value="CORE Certification - Endorser"/>
	<input type="text" value="CORE Certification - Payer"/>
	<input type="text" value="CORE Certification - Provider"/>
	<input type="text" value="CORE Certification - Vendor - Payer"/>
	<input type="text" value="CORE Certification - Vendor - Provider"/>

Figure 1.2

3. Select your Company Type (CORE refers to these as your “Stakeholder Type”) in the drop-down menu. Note the following about the Endorser type:

CORE has created a category for Endorsers. Organizations that do not create, transmit, or use eligibility data are eligible to apply for the CORE Endorser seal. Endorsers will work directly with CORE as there is no CORE Certification testing for Endorsers. If your organization does not fall into the Endorser category you may select a different company type and begin creating an account.

Also note that test scripts used for certification are filtered based on the company (stakeholder) type you select during the enrollment process.

4. When you click on a Company Type, the pricing structure for the type you selected appears lower on the page (Figure 1.3, which shows the pricing structure for a clearinghouse account used for this example).

CORE CERTIFICATION TESTING USER MANUAL

The pricing for CORE Certification Testing is dependent upon the type of entity that is being certified and the size of the organization. If you are a current Faciledi or Claredi Classic customer, please choose the corresponding button and receive the discount subscription price. If you already have a Claredi CORE-Certification Testing account and are certifying an additional platform for your organization, please choose the corresponding additional platform button. Select Continue (below) to create your account.

Please choose one button that describes your organization.

If you are certifying an additional platform for your organization, please select an additional platform option based on the size of your organization.

CORE Certification - Clearinghouse			
Select	Breakdown of Entity Type	Classification of Large vs. Small	Charge
<input type="radio"/>	Large Clearinghouse - First Platform	\$75 million and above in net annual revenue	\$6000.00
<input type="radio"/>	Large Clearinghouse - Each additional platform	\$75 million and above in net annual revenue	\$1500.00
<input type="radio"/>	Small Clearinghouse - First Platform	Below \$75 million in net annual revenue	\$4000.00
<input type="radio"/>	Small Clearinghouse - Each additional platform	Below \$75 million in net annual revenue	\$1000.00
<input type="radio"/>	Faciledi/Classic Large Clearinghouse - First Platform	\$75 million and above in net annual revenue	\$5400.00
<input type="radio"/>	Faciledi/Classic Large Clearinghouse - Each additional platform	\$75 million and above in net annual revenue	\$1350.00
<input type="radio"/>	Faciledi/Classic Small Clearinghouse - First Platform	Below \$75 million in net annual revenue	\$3600.00
<input type="radio"/>	Faciledi/Classic Small Clearinghouse - Each additional platform	Below \$75 million in net annual revenue	\$900.00

Select pricing above before submitting

Figure 1.3

The pricing structure is based on the annual revenue of your organization. Once you select the appropriate option, the Continue button at the bottom is enabled.

5. Click **Continue**. (For this example, we will create an account for a clearinghouse.) This displays the Account Information page (Figure 1.4 shows the top part of the page).

CORE CERTIFICATION TESTING USER MANUAL

Cancel Account

Step 1 of 5

Account Information
Sign the Contract
Enrollment
Questionnaire
Payment Type
Pay Confirmation

Complete all required fields and click the 'Create Account' button.

Have a Question?
Email
sales@claredi.com
or call 1-866-444-0339,
option 6

Create Account
Complete the fields below to create a CORE Claredi account.
Fields marked with * are required.

Login Information

Username: *
Select a username. This should be at least 4 characters with no spaces.

Password: *
Select a password. This must be at least 7 characters.

Confirm Password: *
Retype your password

User Contact Information

First Name: *

Last Name: *

Title:

E-mail Address: *

Figure 1.4

Complete each field with the appropriate information (note that for purposes of illustration, the required fields shown—designated by asterisks—have already been completed).

Click **Create Account** to continue the account setup process (Figure 1.5 shows the top part of the Contract page).

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Cancel Account
Save and Exit

You can click [Save and Exit](#) at any time. When you return, log in with your username and password, and you will be brought back to this page to finish your account creation.

Step 2 of 5

Account Information
Sign the Contract
CORE Enrollment Questionnaire
Payment Type
Pay Confirmation

Read the contract, e-sign at the bottom, and click 'Next'.

If the person listed for your company is incorrect, click the 'Back' button twice to return to the Account Information screen (Step 1) and correct the name.

Have a Question?
Email sales@claredi.com
or call 1-866-444-0339, option 6

Contract

To continue your enrollment, **please read the following contract, and electronically sign at the bottom of the contract.**
If you'd like to download a copy of this contract for your records, click [here](#).

ClarediSM CORE Certification Testing Terms and Conditions of Use, with Attached Business Associate Agreement and Summary of Services

- 1. Terms of Use Agreement.** This Terms and Conditions of Use of Service Agreement (the "Terms" or "Agreement") is for Ingenix, Inc.'s ClarediSM CORE Certification Testing service for health care transactions. By your signature below, you (the "Subscriber") agree to these Terms. The Business Associate Agreement attached as Exhibit A, and the summary of current Claredi CORE Certification Testing services ("Summary of Services") attached as Exhibit B are part of this Agreement.
- 2. License to Subscriber.** Subject to the terms of this Agreement, Ingenix grants to Subscriber a limited, non-exclusive, terminable license (the "License") to use the Claredi CORE Certification Testing service. This License covers only the Claredi CORE Certification Testing service.
- 3. Ingenix' Obligations Regarding ClarediSM CORE Certification Testing Service.** Ingenix shall ANALYZE Subscriber's Submitted Transactions generally as described in the Summary of Services. As appropriate to the Submitted Transaction, the testing may include, among other things:
 - i. Standard Transaction syntax;
 - ii. Standard Transaction data content;

Figure 1.5

6. Review the contract and enter an e-signature. If you would like to download a copy of the contract for your records, select the link in the second sentence.

When using an e-signature, you must use a "+" at the beginning, in the middle, and at the end of the name used to create the account. Do not use a middle name or initial. An example of an e-signature is +John+Doe+. If you enter your e-signature incorrectly, you will be prompted with the correct way to complete the e-signature.

7. Click **I Agree** at the bottom. When you click I Agree, the first of two CORE Enrollment Questionnaire pages displays (Figure 1.6).

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Do you process 270/271 transactions in a Batch environment (See CORE's definitions of Batch and Real Time below)?

Yes
 No

CORE defines 'Batch' as follows:

Batch (Batch Mode, Batch Processing Mode)

Batch mode is when the initial (first) communications session is established and maintained open and active only for the time required to transfer the batch X12 Interchange, which may contain one or more Functional Groups containing one or more 270 Transaction Sets, and receive the acknowledgement that the file was successfully received. The next (second) communications session is established at a later time and maintained open and active only for the time required to retrieve the batch X12 Interchange containing one or more Functional Groups containing one or more 271 Transaction Sets and acknowledge that the file was successfully received. Alternatively, at the discretion of the trading partners, the communications session may be maintained open and active for a period of time to be mutually defined between the trading partners following the successful transfer of any file of data. "Fast batch" or any batch that is converted to real time by the receiver is required to meet the CORE requirements for batch.

CORE defines 'Real Time' as follows:

Real Time (Real Time Mode, Real Time Processing Mode)

Real Time mode is when an immediate response to an inquiry is required and a single communications session is established and maintained open and active until the required X12 acknowledgement is received by the entity initiating the communications session. Communication is complete when the session is closed. A Real Time inquiry is limited to one 270 eligibility request transaction set inquiring about one individual, one Functional Group containing only one 270 transaction set, and one Interchange containing only one Functional Group.

Figure 1.6

8. Answer the question about your use of the 270/271 transactions in a batch environment. Also note the CORE definitions of Batch and Real Time.

The type of account being created will determine the question(s) that appear(s) on this page; note that this is for a clearinghouse account. Payers, for example, will be presented with a question about if they require dependents be supplied in loop 2100C or 2100D of their 270 transactions.

9. Click **Next**. This displays the second CORE Enrollment Questionnaire page (Figure 1.7).

CORE CERTIFICATION TESTING USER MANUAL

Cancel Account
Save and Exit

Step 3 of 5

Account Information
Sign the Contract
CORE Enrollment Questionnaire
Payment Type
Pay Confirmation

Complete the information required

Have a Question?
Email
sales@claredi.com
or call 1-866-444-0339,
option 6

Check the items that you are sure do not apply to your organization

For each one checked you will be asked to upload a rationale statement justifying your selection. You will be able to change these selections later.
Click on the activity name to see a more detailed description of what is required.

Companion Document Format

- CORE Script # 1 Companion Document conforms to the flow and format of the CORE 270/271 Companion Document Template
- CORE Script # 2 Companion Document conforms to the format for presenting each segment, data element, code flow, and format of the CORE 270/271 Companion Document Template

Connectivity

- CORE Script # 1 Valid Logon Attempt
- CORE Script # 2 Invalid Logon Attempt
- CORE Script # 3 Verify that communications server/module creates, assigns, logs, links the required data elements to HTTP message payload

270/271 Data Content

- CORE Script # 1 Create a generic 270 eligibility inquiry
- CORE Script # 2 Create a 271 with the health plan name

Figure 1.7

10. The listed items correspond to the activities you will complete during CORE Certification testing. Note that each item is a hyperlink to a window that provides more information about the item.

Select the checkbox for each condition listed that does not apply to your organization. If you do *not* select a given checkbox, the condition is considered applicable to your organization. Note that whether or not you select a given condition can affect what you will need to do to successfully complete CORE Certification testing. If you are unsure if the item applies to your organization, you can change the selection from within the Claredi system later. When you are finished, click **Next**. This displays the Payment Type page (Figure 1.8).

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Cancel Account
Save and Exit

You can click [Save and Exit](#) at any time. When you return, log in with your username and password, and you will be brought back to this page to finish your account creation.

Step 4 of 5

Account Information
Sign the Contract
CORE Enrollment Questionnaire
Payment Type
Pay Confirmation

Choose how you would like to pay for this Claredi Account, and click 'Next'.

Have a Question?
Email
sales@claredi.com
or call 1-866-444-0339, option 6

Payment Summary

Item	Amount
1 year subscription to Claredi testing and certification service for CORE Certification - Clearinghouse	\$6000.00
Total	\$6000.00

Note: Claredi's CORE-Certification Testing services will be made available to you immediately and will be available for 14 days. Payment must be received within 14 days to ensure your account remains active.

Pay by check

Back Next

Figure 1.8

11. Note the amount you will pay (the amount shown in Figure 1.7 is for illustration purposes only). Click the **Pay by check** radio button, then **Next** to display the Pay Confirmation page (Figure 1.9).

CORE CERTIFICATION TESTING USER MANUAL

Cancel Account
Save and Exit

Step 5 of 5

Account Information
Sign the Contract
CORE Enrollment
Questionnaire
Payment Type
Pay Confirmation

Verify your Billing Information, then click 'Finish'.
If you do not have a Check Number, leave it blank.
Have a Question?
Email sales@claredi.com or call 1-866-444-0339, option 6

You can click **Save and Exit** at any time. When you return, log in with your username and password, and you will be brought back to this page to finish your account creation.

Billing Confirmation

Please send your check to the following address:

Ingenix-Claredi
Attn: Dan Young, 3rd floor
2525 Lake Park Blvd.
Salt Lake City, UT 84120

Note: The invoice on the next page is the only invoice you will receive from ClarediSM. You will not be billed separately.

Please print and pay from the invoice on the following page. To complete your Claredi Account, please confirm your billing information and click 'Finish' below to generate the invoice.

Fields marked with * are required.

Billing information	
Name on check:	<input type="text" value="Clearinghouse"/> *
Address:	<input type="text" value="498 N. 900 W."/> *
City:	<input type="text" value="Kaysville"/> *
State:	<input type="text" value="Utah"/> *
Zip:	<input type="text" value="84041"/> *
Check Number:	<input type="text" value="1234"/>

Figure 1.9

12. Send your payment to the address shown on this page. To create your invoice, verify the Billing Information in the lower pane and enter the check number. Then click **Finish**. This displays the Invoice page (Figure 1.10).

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Invoice			
Sold To: Clearinghouse 498 N. 900 W. Kaysville, UT 84037		Sold By: Ingenix 12125 Technology Drive Eden Prairie, MN 55344 (801) 982-3144	
		Tax ID: 41-1858498	
Method of Payment: Check	Check Number: 1234	Date: Nov 15 2006	Account ID: 1010 Invoice Number: 477
Item			Amount
1 year subscription to Claredi testing and certification service for CORE Certification - Clearinghouse			\$6000.00
Total:			\$6000.00
This is your Invoice. Please print as many copies as you need. Then remit payment within 14 days to the address above.			

Figure 1.10

13. This page contains the invoice, or transaction receipt, for the services you have just purchased. Check to make sure all information is accurate, then print a copy for your records. If your invoice or transaction receipt is incorrect, please contact Claredi Customer Support at 1-866-444-0339, option 5.

Congratulations! You have successfully set up your account.

You can begin using your account immediately, but note that payment must be received by Claredi within 14 days to keep your account active. If your account becomes de-activated, we will re-activate your account upon receipt of your payment.

Before you begin, you should become familiar with the process of CORE Certification testing. To do so, select "Next" at the bottom of the page (or if you have logged out, log back in and click **Getting Started** in the left menu). This displays the Getting Started page (Figure 1.11A and B).

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Welcome Clay!

Getting Started

Claredi's CORE Certification testing product has been designed to follow the CORE Phase I Rules and the requirements for achieving the CORE Certification Seal. The following steps will assist you in successfully getting started with your CORE Certification testing.

1. Before you begin, you must familiarize yourself with the CORE Phase I Rules and Certification requirements. [Click here](#) to be taken to the CORE Certification website.
2. Claredi's CORE Certification testing follows each of the sections outlined in the CORE Phase I Certification Testing Suite.pdf. CORE Certification testing for the CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules requires you utilize the CORE Master Test Bed created by CORE. [Click here](#) to download the CORE Phase I Certification Testing Suite.pdf, the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf and the CORE Master Test Bed Data in both wrapped and unwrapped formats. The CORE Certification Testing Suite Version 1.0.0 Supplement.pdf contains instructions on how you are to utilize the CORE Master Test Bed data for populating your databases for CORE Certification testing.
3. It is recommended that you download the [User Manual](#) for this site as it will provide you with additional assistance in guiding you through your CORE Certification efforts.
4. Once you are familiar with the CORE Certification testing documentation, you will need to customize your account with appropriate identifiers, passwords, delimiters, etc in your [Trading Partner Profile](#) .
5. During testing, if you would like Claredi's Customer Support staff to have access to your account, please [click here](#) and check the Allow Claredi Customer Support access to my account box. You may also access this at anytime from the Support tab at the top of each screen.

Figure 1.11A

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6. CORE Pre-Certification Testing
The CORE Pre-Certification Testing area is an optional area that allows you to pre-test your system using the CORE Test Bed Data prior to beginning your CORE Certification testing. This area only tests the CORE Phase I 270/271 Data Content rules. You may also continue to use this area after you have completed your CORE Certification to ensure your system retains its capabilities. Testing done in this area does not apply towards CORE Certification, nor are you required to pre-test your system through this area.
7. CORE Certification Testing
The CORE Certification Testing area allows you to test your system using the CORE Test Bed Data for all the test scripts required to apply for your CORE Certification Seal. You must complete all of the tasks in the CORE Certification Testing area successfully prior to applying for your CORE Certification Seal. You may also continue to use this area after you have completed your CORE Certification to ensure your system retains its capabilities.
8. Production Testing
The Production Testing area is an optional area that is accessible once you have successfully completed your CORE Certification Testing. This area will allow you to test your systems capability of conforming to the CORE Phase I 270/271 Data Content Rules using your own production data. The Production Testing area also contains additional test scripts for some of the CORE Phase I 270/271 Data Content Rules that are not required for CORE Certification. You may also continue to use this area after you have completed your CORE Certification to ensure your system retains its capabilities. Testing done in this area does not apply towards CORE Certification, nor are you required to test your system through this area.
9. We always want your input. Use the [Feedback](#) form to help us help you better.
10. The [Logout](#) option is available from the left side menu as well as at the top right hand corner of all screens for your convenience.

Figure 1.11B

Read the steps on this page so you understand what you need to do to complete your CORE Certification testing.

You are now ready to begin.

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CHAPTER 2: CORE PHASE I RULES AND CERTIFICATION REQUIREMENTS

If you haven't already done so, please download the Master Test Bed Data from the link on left navigation pane of the interface. One of the documents included is the CORE Phase I Certification Testing Suite.pdf.

Claredi's CORE Certification testing follows each of the sections outlined in the CORE Phase I Certification Testing Suite.pdf. Each of the individual Claredi CORE-Certification test scripts are grouped by the corresponding sections in the CORE Phase I Certification Testing Suite.pdf. Each of the individual test scripts are in the same order as they appear in the CORE Phase I Certification Testing Suite.pdf. It will be quite useful for you to have the CORE Phase I Certification Testing Suite.pdf available as you work on each individual activity.

What is Covered by Certification Testing

The CORE requirements cover several areas that impact the interoperability of your eligibility system. The requirements are divided into these areas:

- Connectivity using HTTPS
- Response time
- 270/271 transactions - service type
- 270/271 transactions - benefit status
- 270/271 transactions - patient financial responsibility
- Acknowledgements and error reporting
- Companion guide compliance
- System availability

The Process for CORE Certification Testing

The general process we use for CORE certification testing looks like this:

- Open a Claredi CORE Certification Testing account
- Submit your companion guide for eligibility transactions to Claredi (if applicable to your account type)
- Load the CORE Master Test Bed data into your test system (patients, providers, benefits, etc.)
- Prepare to send (providers) or receive (payers) the CORE test cases
- Use the CORE system to test your HTTPS connectivity
- Use the CORE system to test the CORE test cases against your system
- Submit additional documentation (response time, uptime, logs, etc.) to Claredi
- Submit your CORE Seal Application and associated documents to CORE (either directly to CORE or you may at your option have Claredi forward these to CORE on your behalf)
- Send any applicable CORE Seal application fees to CORE
- Receive CORE Seal directly from CORE



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This process varies slightly whether you are certifying a provider, payer, clearinghouse or software vendor system for compliance. Once you open an account, the sequence appropriate for your account type will appear on your home page.

Before you are granted final CORE certification test passing status, an administrator will manually review all of the required activities you complete. The administrator will make necessary adjustments to the status condition for each activity. You will see these adjustments in your account when they occur.

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CHAPTER 3: CORE MASTER TEST BED

HOW TO USE THE CORE MASTER TEST BED DATA

CORE Certification testing for the CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules requires you utilize the CORE Master Test Bed created by CORE. The members and their associated benefits are represented in the CORE-Mstr-Test-Bed-DataUnwrappedFinal06-02-06.txt (if you need to use 270/271 files with Carriage Return/Line Feed segment terminators) or the CORE-Mstr-Test-Bed-DataWrappedFinal06-02-06.txt (if you need to use 270/271 files with ~ segment terminators). The members and their associated benefits are also outlined in tables in the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf document.

You will need to complete the following requirements based on your organization type before beginning CORE-Certification testing for CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules. See the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf document that is downloaded from our site for additional information.

Requirements for Payers, Clearinghouses, and Vendors for Payers

You will need to load each of the 24 member's demographic information (Name, Date of Birth, Member ID, etc.) and all of their associated benefits and patient financial responsibility information into your Eligibility system's databases.

Requirements for Providers, and Vendors for Providers

You will need to load each of the 24 member's demographic (Name, Date of Birth, Member ID, etc.) information into your Practice Management system's databases.

Downloading the CORE Master Test Bed

Click **CORE Master Test Bed** in the left menu. This displays the CORE Master Test Bed page (Figures 3.1A and B).

CORE CERTIFICATION TESTING USER MANUAL

Welcome Clay!

CORE Master Test Bed

Claredi's CORE Certification testing follows each of the sections outlined in the CORE Phase I Certification Testing Suite.pdf. CORE Certification testing for the CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules requires you utilize the CORE Master Test Bed created by CORE.

How to use the CORE Master Test Bed Data

CORE-Certification testing for the CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules requires you utilize the CORE Master Test Bed created by CORE. The members and their associated benefits are represented in the CORE-Mstr-Test-Bed-DataUnwrappedFinal06-02-06.bt (if you need to use 270/271 files with Carriage Return/Line Feed segment terminators) or the CORE-Mstr-Test-Bed-DataWrappedFinal06-02-06.bt (if you need to use 270/271 files with ~ segment terminators). The members and their associated benefits are also outlined in tables in the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf document.

You will need to complete the following requirements based on your organization type before beginning CORE-Certification testing for CORE Phase I 270/271 Data Content Rules as well the Real Time and Batch Acknowledgement Rules. See the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf document that is downloaded from our site for additional information.

Figure 3.1A

Requirements for Payers, Clearinghouses and Vendors for Payers

You will need to load each of the 24 member's demographic information (Name, Date of Birth, Member ID, etc.) and all of their associated benefits and patient financial responsibility information into your Eligibility System databases.

Requirements for Providers, and Vendors for Providers

You will need to load each of the 24 member's demographic (Name, Date of Birth, Member ID, etc.) information into your Practice Management System databases.

[Click here](#) to download the CORE Phase I Certification Testing Suite.pdf, the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf and the CORE Master Test Bed Data in both wrapped and unwrapped formats. The CORE Certification Testing Suite Version 1.0.0 Supplement.pdf contains instructions on how you are to utilize the CORE Master Test Bed data for populating your databases for CORE Certification testing.

Figure 3.1B

Click the link in the paragraph to download and save the test bed. Read through the two .pdf documents before you use the test bed data to prepare your system(s) for testing.

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 4: CUSTOMIZING YOUR ACCOUNT

Before you begin working through the testing activities, you need to establish your Trading Partner Profile, Payer Connectivity Testing criteria (if applicable), and Health Plan Subscriber ID Routing Prefix (if applicable).

Trading Partner Profile

Your Trading Partner Profile information (interchange sender/receiver IDs, application sender codes, etc.) will be used to populate the test files you use for certification with data that will work in your system.

Log in and click **Trading Partner Profile** in the left navigation menu to display the Trading Partner Profile page (Figures 4.1A and B). If your account type is for a payer or clearinghouse, the Trading Partner Profile page will display as illustrated in Figure 4.1A, otherwise your Trading Partner Profile will display as illustrated in Figure 4.1B.

If you are a payer, during your enrollment you were asked “Do you require providers to send dependent information (e.g. Spouse, Children) in the 2100D loop (this occurs when dependents are not assigned their own unique Member Identification Number)? Yes/No. Your answer will appear on the Trading Partner Profile page under the Health Plan Subscriber Routing Prefix. If you need to change this, select the appropriate answer and click ‘Save’ at the bottom of the page.

Payer Connectivity Testing

Payers and clearinghouses can set up their remote host connection parameters [here](#).

Health Plan Subscriber ID Routing Prefix ... [More Info](#)

Trading Partner Profile

The Claredi CORE Certification system allows you to define the trading partner information used to populate the test files with data that will work with your system.

In order to allow you to test your system with real-world trading partner information you can modify any of the information below to meet your system requirements. For example, if you are a Health Plan and require your Interchange Receiver ID to be your Federal Tax ID number, you would select the Interchange Receiver ID Qualifier for ISA07 to “30” from the drop-down list and enter your Federal Tax ID number in the Interchange Receiver ID for ISA08. For additional information about the Interchange and Application Sender and Receiver IDs and the associated codes, see the X12N 004010X092 270/271 Implementation Guide Appendix B.

Values for ISA06 and ISA08 can be from 1 to 15 characters in length. Claredi will space fill any needed characters to ensure ISA06 and ISA08 meet the X12 length requirements.

You may also choose to leave any or all of the default values for your test files.

You need to click on the SAVE button to begin your CORE Certification steps even if you want to use all of the displayed default values for your test files.

X12 Element	270 Real-Time	271 Real-Time	270 Batch	271 Batch
Interchange Sender ID Qualifier .. ISA05:	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>
Interchange Sender ID .. ISA06:	<input type="text" value="PROVIDER A"/>	<input type="text" value="PLANA"/>	<input type="text" value="PROVIDER A"/>	<input type="text" value="PLANA"/>
Interchange Receiver ID Qualifier .. ISA07:	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>	<input type="text" value="ZZ"/>

Figure 4.1A

CORE CERTIFICATION TESTING USER MANUAL

Trading Partner Profile

The Claredi CORE Certification system allows you to define the trading partner information used to populate the test files with data that will work with your system.

In order to allow you to test your system with real-world trading partner information you can modify any of the information below to meet your system requirements. For example, if you are a Health Plan and require your Interchange Receiver ID to be your Federal Tax ID number, you would select the Interchange Receiver ID Qualifier for ISA07 to "30" from the drop-down list and enter your Federal Tax ID number in the Interchange Receiver ID for ISA08. For additional information about the Interchange and Application Sender and Receiver IDs and the associated codes, see the X12N 004010X092 270/271 Implementation Guide Appendix B.

Values for ISA06 and ISA08 can be from 1 to 15 characters in length. Claredi will space fill any needed characters to ensure ISA06 and ISA08 meet the X12 length requirements.

You may also choose to leave any or all of the default values for your test files.

You need to click on the SAVE button to begin your CORE Certification steps even if you want to use all of the displayed default values for your test files.

X12 Element	270 Real-Time	271 Real-Time	270 Batch	271 Batch
Interchange Sender ID Qualifier .. ISA05:	ZZ	ZZ	ZZ	ZZ
Interchange Sender ID .. ISA06:	PROVIDER A	PLANA	PROVIDER A	PLANA
Interchange Receiver ID Qualifier .. ISA07:	ZZ	ZZ	ZZ	ZZ

Figure 4.1B

Figure 4.1B shows only some of the X12 File Types listed on the page. Ensure that the correct data is entered for all fields (all are required).

In the Delimiters pane (not shown) specify the delimiters you use if they are not the default values shown in the fields. Then click **Save**.

Your Trading Partner Profile is now complete.

Payer Connectivity Testing

If you are a payer or clearinghouse, you will need to set up your remote host connectivity parameters before you get started with the certification process.

On the Payer Connectivity Testing/Trading Partner Profile page (see Figure 4.1A), click the first link in the Payer Connectivity Testing section ("[here](#)") to display the Connectivity Parameters for Real-Time Testing page (Figures 4.2A-C).

CORE CERTIFICATION TESTING USER MANUAL

Connectivity Parameters For Real-Time Testing

Use the fields below to identify your host system and data required to send files for testing.

Web Address or Universal Resource Locator (URL)

URL:

Enter the web address or Universal Resource Locator (URL) required to access your system.

Include non-standard port number's (other than www=80, http=80, or https=443) in the URL.
(e.g. www.claredi.com:3598/page.php ... where '3598' is a non-standard port number)

Keyword=Value Pairs
Enter the keyword and value pairs below that are required to connect to your server

	Keyword		Value
File (required)	<input type="text"/>	e.g., file, FileName, submission, etc.	CORE Test Data
Username (required)	<input type="text"/>	e.g., username, UserName, Userid, etc.	<input type="text"/>
Password (required)	<input type="text"/>	e.g., password, passwd, etc.	<input type="text"/>
Optional #1	<input type="text"/>	e.g., channel, task, etc.	<input type="text"/>
Optional #2	<input type="text"/>		<input type="text"/>
Optional #3	<input type="text"/>		<input type="text"/>
Optional #4	<input type="text"/>		<input type="text"/>

In addition to the requirements of the CORE Eligibility and Benefits Connectivity Rules, some entities may optionally require the use of X.509 client certificates for client authentication (this is not required for CORE-Certification testing). Select one of the options below to identify if and how you want to use X.509 client certificates for client authentication. If you do not require the use of X.509 client certificates for client authentication, leave the default of 'Do not use X.509 certificates' selected.

Do not use X.509 certificates.
 Use your own X.509 certificates.

Figure 4.2A

Figure 4.2A shows the Web Address and Keyword=Value Pairs pane.

Enter the **URL** required to access your system in the URL field.

In a lengthy URL there are various security, user ID, and file keyword parameters that define access to a system. The information you provide (or update) in the Keyword=Values Pairs section shown above consists of these identifying parameters for your system. Enter the File, Username, and Password keywords (and any optional keywords) in the text fields provided. Then enter the corresponding CORE Test Data value for each.

In addition to the requirements of the CORE Eligibility and Benefits Connectivity Rules, some entities may optionally require the use of X.509 client certificates for client authentication (this is not required for CORE-Certification testing). Select one of the options to identify if and how you want to use X.509 client certificates for client authentication. If you do not require the use of X.509 client certificates for client authentication, leave the default of 'Do not use X.509 certificates' selected (Figure 4.2A).

CORE CERTIFICATION TESTING USER MANUAL

Figure 4.2B shows the X.509 Certificates pane.

If you choose to use your own certificates you will need to enter them in the 'X.509 Certificates' section below.

X.509 Certificates
Enter the information below if you are using your own X.509 certificate for client authentication with your server.

X.509 PEM Encoded Client Public Certificate	
--	--

Copy and paste your X.509 public certificate here if we are going to use your certificate for testing.

Example Certificate:

```
-----BEGIN CERTIFICATE-----
MIIC5jCCAK+gAwIwBQglQA5iY+jZGkb4v13zYsODrjDANBgkqhkiG9w0BAQQFADBi
...
MGIBUJfNVZqhAGLEHZNAZvEwicktSQdZ5jceZBLA7Jr17yzj+oYP2x9QBtBag5PD
9b0BBhPXbBztSJK2SJ2+yXqpj3CGSsXs20Q=
-----END CERTIFICATE-----
```

To convert a DER encoded certificate to a PEM encoded certificate:
openssl x509 -in cert.der -inform DER -out cert.pem -outform PEM

Click one of the links below for more information regarding X.509 certificate authentication:
[X.509 Proxy Certificates for Dynamic Delegation](#)
[How to use the OpenSSL utility](#)
[Useful OpenSSL Commands](#)

Figure 4.2B

If you are not using an X.509 certificate you do not need to enter anything in this pane. If you are using your own X.509 certificate, paste it into the Client Public Certificate field. Then paste your private X.509 PEM (Privacy Enhanced Mail) encoded key and the private key password in the fields provided (Figure 4.2C).

CORE CERTIFICATION TESTING USER MANUAL

X.509 PEM Encoded Private Key

Copy and paste your X.509 PEM encoded private key here if we are going to use your certificate for testing.

Example Private Key:

```
-----BEGIN RSA PRIVATE KEY-----  
Proc-Type: 4,ENCRYPTED  
DEK-Info: DES-EDE3-CBC,E5E63802D31BBE56  
...  
8NJeVZoUmYzxeo1wvzItEOWSYybQsh3p0BKJlisdwbGITarr43sDN2knYMjo9NPV  
-----END RSA PRIVATE KEY-----
```

Private Key Password Enter the password required to use your X.509 PEM encoded private key.

Figure 4.2C

Click **Add** to save all changes.

Health Plan Subscriber ID Routing Prefix

If your system requires a Health Plan Subscriber ID Routing Prefix (e.g., Blues Exchange Routing Code) preceding a Subscriber ID, you will need to enter that value into the system.

On the Payer Connectivity Testing/Trading Partner Profile page (see Figure 4.2A), click the second link in the Payer Connectivity Testing section (“[More Info](#)”) to display the Health Plan Subscriber ID Routing Prefix page (Figure 4.3).

Health Plan Subscriber ID Routing Prefix

If your system requires a Health Plan Subscriber ID Routing Prefix (i.e. Blues Exchange Routing Code) preceding a Subscriber ID, enter that value here, otherwise leave blank.

Health Plan Subscriber ID Routing Prefix:

Figure 4.3

Enter the routing prefix value and click **Save**.



CORE CERTIFICATION TESTING USER MANUAL

Page intentionally left blank.

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 5: CORE PRE-CERTIFICATION TESTING

With your account set up, you are ready to begin your CORE Certification testing.

The CORE Pre-Certification Testing area allows you to pre-test your system using the CORE Master Test Bed Data prior to beginning your CORE Certification testing. You may also continue to use this area after you have completed your CORE Certification testing to ensure your system retains its capabilities. *Testing done in this area does not apply toward CORE Certification testing results, nor are you required to pre-test your system through this testing mechanism.*

The CORE Pre-Certification Testing area validates only CORE Phase I Rules for Connectivity and 270/271 Data Content; it does not encompass the remaining categories.

PRE-CERTIFICATION TESTING

Before you begin testing activities, following is a brief overview of the page and instructions for downloading the test bed data.

Click **CORE Pre-Certification Testing** in the left menu. This displays the main CORE Pre-Certification Testing page (Figures 5.1A and B).

Welcome Clay!

CORE Pre-Certification Testing

The CORE Pre-Certification Testing area allows you to pre-test your system using the CORE Master Test Bed Data prior to beginning your CORE Certification testing. You may also continue to use this area after you have completed your CORE Certification to ensure your system retains its capabilities.

Testing done through this area will not be applied to your CORE Certification testing. [Click here](#) to be taken to the CORE Certification Testing page.

The CORE Pre-Certification Testing area only validates CORE Phase I Rules for 270/271 Data Content. Please refer to CORE Certification Test Suite documentation for detailed requirements of each test script. The 270/271 Data Content test scripts in the CORE Pre-Certification Testing area rely on the use of the CORE Master Test Bed created by CORE. [Click here](#) to be taken to the CORE Master Test Bed page to download the CORE Certification Test Suite documentation and the CORE Master Test Bed data.

The 270/271 Data Content Test Scripts require you to download files to be processed by your system. You may download the files on an individual basis from within the test script, or you may download all 270/271 test files at one time [here](#).

Figure 5.1A

CORE CERTIFICATION TESTING USER MANUAL

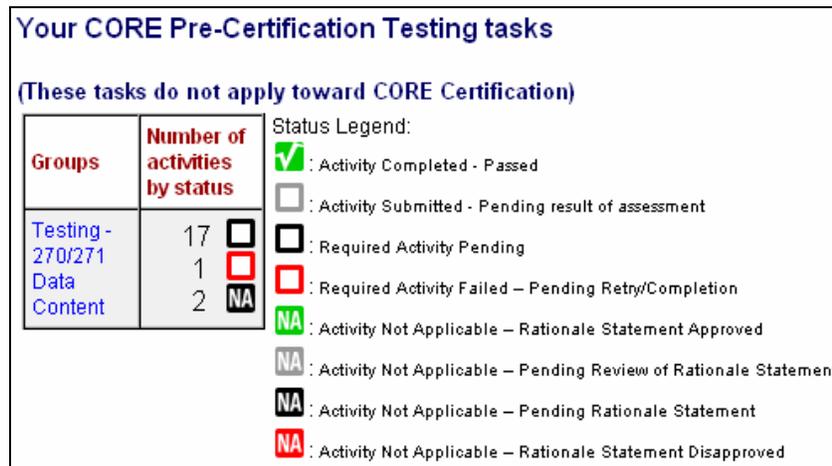


Figure 5.1B

Note that you can download and save all 270/271 Data Content Script files at this time if you want to, or you can download and save them individually later. If you do download all the files, you may use the same files for CORE Pre-Certification Testing and CORE Certification Testing.

However, note the following about downloading all files at once vs. individually later: Downloading all files at once will provide you with all of the test files you will need for each of the CORE Test Scripts. Each file will contain a unique trace number in a TRN segment. However, note that only the most recent test file downloaded, whether it be through the “all file download” function or directly from the individual CORE Test Script, must be used, as the system validates the trace number in the TRN to ensure the most recent file was used.

If you download all files at once, a new trace number is inserted into each downloaded file; this means the trace numbers in existing individual response files that you may have already generated for certification activities will not match the new numbers. This means the new files will not upload successfully.

The most recent test file downloaded for each CORE Test Script is displayed at the top of the Activity History for the test script.

The Status Legend on this page (Figure 5.1B) shows your progress in completing testing activities. Each legend shows what each symbol represents in the progress chart next to it (note that if you selected any items that do not apply to your organization for 270-271 Data Content when you created your account, your account would show a Pending Rationale Statement symbol representing those selections).

Pre-Certification Testing Activities

When you are ready to begin the testing activities, click the **Testing – 270/271 Data Content** link on the main CORE Pre-Certification Testing page (see Figure 5.1B). This displays the Activity List page (Figure 5.2).

CORE CERTIFICATION TESTING USER MANUAL

Return to CORE Pre-Certification Testing
CORE Pre-Certification Group: Testing - 270/271 Data Content

Testing - CORE Script # 1 Create a generic 270 eligibility inquiry
Create a valid generic 270 eligibility inquiry
 Required Activity Pending

Testing - CORE Script # 2 Create a 271 with the health plan name
Create a valid 271 response transaction indicating the name of the health plan covering the individual specified in the 270 eligibility inquiry
 Required Activity Pending

Figure 5.2

Click on **Testing - Script #1** to display the Activity page for this activity (Figure 5.3).

Return to CORE Pre-Certification Testing | Return to CORE Pre-Certification Testing Group:
Testing - 270/271 Data Content

CORE Pre-Certification Group: Testing - 270/271 Data Content

Testing - CORE Script # 1 Create a generic 270 eligibility inquiry
Create a valid generic 270 eligibility inquiry
 Required Activity Pending

Manual Method
Step 1: Create valid 270 eligibility request
Step 2: Upload here for validation

If you have determined that this activity does not apply to your organization [click here](#).

Click 'Browse' button to find the file to upload then click 'Submit' to send the file to Claredi.

Activity History
Click the filename to view or download
[Click here to refresh the activity history](#)

Date	Information	File Size	Action
------	-------------	-----------	--------

Figure 5.3

You have two choices: If this activity does not apply to you, you can click the **click here** link. Then you use the **Browse** function to upload a rationale statement that explains why this activity does not apply to you. Note that if you selected this activity as not applying to your organization when you created your account, you will see a notice here telling you to upload a rationale statement.

CORE CERTIFICATION TESTING USER MANUAL

If the activity applies to you, use the **Browse** function to upload the file for the activity. Follow the instructions carefully, and submit the file to Claredi.

Rational statements and files (where applicable) are reviewed by Claredi.

Figure 5.4A shows the Test Passed screen, which displays when you have successfully completed a task.

Return to CORE Pre-Certification Testing | Return to CORE Pre-Certification Testing Group: Testing - 270/271 Data Content

CORE Pre-Certification Group: Testing - 270/271 Data Content

Testing - CORE Script # 1 Create a generic 270 eligibility inquiry
Create a valid generic 270 eligibility inquiry

Activity Completed - Passed

YOU HAVE PASSED THIS TEST

The last file that you submitted for review is evaluated below:
(Items in red failed. Items in green passed)

You must meet ANY of these requirements before this file will pass:

- Subscriber Service Type
- Dependent Service Type

Manual Method

Step 1: Create valid 270 eligibility request
Step 2: Upload here for validation

If you have determined that this activity does not apply to your organization [click here](#).

Click 'Browse' button to find the file to upload then click 'Submit' to send the file to Claredi.

Figure 5.4A

Figure 5.4B appears lower on the same screen and shows the Activity History of files uploaded to Claredi.

Activity History

Click the filename to view or download
[Click here to refresh the activity history](#)

Date	Information	File Size	Action
2006-11-16 00:59:33	DATA270-SCRIPT1.txt passed all tests Details		
2006-11-16 00:59:21	DATA270-SCRIPT1.txt	431	Uploaded

Figure 5.4B

CORE CERTIFICATION TESTING USER MANUAL

Summary Report

For the two lower files listed in Figure 5.4B you can click on the file name to view the file. In the top file listed (the one that just passed the test), you can click **Details** to view the Summary Report (Figures 5.5A and B).

This is not a certification or verification of HIPAA compliance. Summary of test report for confidential use by Claredi customer only.	
File name	COREACKB270_2-1_270_945_060927.txt
Size	420 bytes
Comment	Auto Submit by CORE Certification Module.
Date Submitted	2006-10-02 21:09:58 GMT
Analysis Start Time	2006-10-02 21:10:05 GMT
Analysis Finish Time	2006-10-02 21:10:05 GMT
Submission Method	Web site SSL upload (from 0.0.0.0)
Velocedi Version	3-0420
Velocedi Analysis Status	Analysis complete

Figure 5.5A

HIPAA Version	004010X092A1
Transaction Identifier	270
Action	Display HIPAA and X12 report: <input checked="" type="radio"/> Errors and data <input type="radio"/> Errors only <input type="text" value="No index of errors"/> Help <input type="radio"/> Data only <input type="checkbox"/> Download as zipped archive. <input type="button" value="Click here for the HIPAA and X12 analysis report"/>
Support	You may allow Claredi Customer Support reps to view the information in this file. Click here to review the Claredi Privacy Policy. <input type="checkbox"/> Allow Claredi Customer Support to view this file
This is not a certification or verification of HIPAA compliance. Summary of test report for confidential use by Claredi customer only.	

Figure 5.5B

CORE CERTIFICATION TESTING USER MANUAL

The parameters of the Summary Report are described as follows:

File name: Name of the file submitted. Claredi does not alter file names.

Size: Byte size of the file submitted.

Comment: Displays comments added during file submission.

Date Submitted: Date and time the file was submitted.

Analysis Start Time: The time the analysis began.

Analysis Finish Time: The time the analysis was completed.

Submission Method: Lists submission method used to upload the file (i.e., website or dial-up).

Velocedi Version: The version of the Velocedi analyzer used for processing the file.

Velocedi Analysis Status: Testing is complete.

HIPAA Version: The standard sent in the file (e.g., 004010X092A1).

Transaction Identifier: The transaction type in the file (e.g., 270).

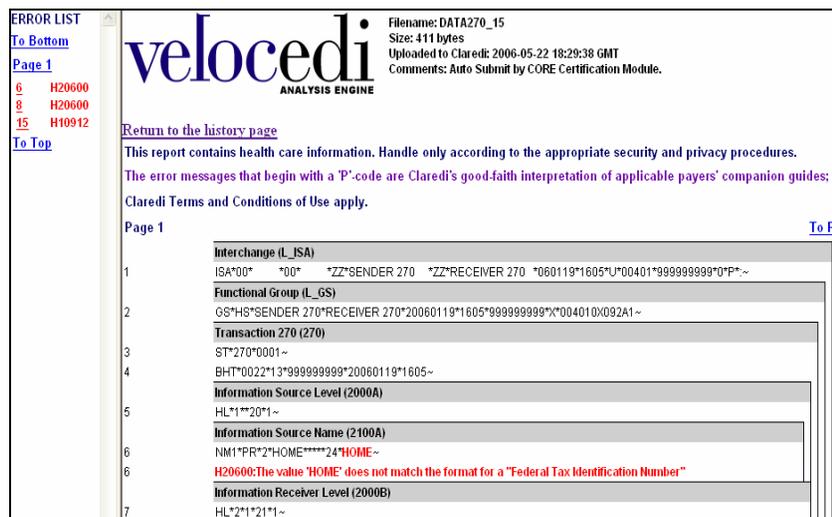
Action: You have the option of viewing the analysis report (Velocedi report) with only errors, errors with the associated data, or only the original data. The Velocedi report is easy to understand and provides detailed information about each unit in the file. HIPAA errors, business errors, warnings, and payer-specific edit errors are shown (as applicable), as well as a summary of the entire file. It is useful for matching claims back to the practice management system or provider billing system.

Index by Error codes: This will cause an index (list) of Velocedi report error codes to appear in a pane next to the Velocedi Report pane. You can click on the segment number listed below an error code in the index, and the interface will navigate to the error's location in the report pane.

Index by segment number: The index displays the errors in order by segment number.

After you configure the Action settings how you want, click the **Click here for the HIPAA and X12 analysis report** button. This displays the Velocedi report.

If you select 'Index by segment number' in the drop-down menu, this will cause an index (list) of Velocedi report segment numbers to appear in a pane next to the Velocedi report pane (Figure 5.6A).



The screenshot displays the Velocedi ANALYSIS ENGINE interface. On the left, an 'ERROR LIST' pane shows a table of errors:

Segment	Error Code
6	H20600
8	H20600
15	H10912

Below the error list are links for 'To Bottom', 'Page 1', and 'To Top'. The main report area features the 'velocedi ANALYSIS ENGINE' logo and file metadata: 'Filename: DATA270_15', 'Size: 411 bytes', 'Uploaded to Claredi: 2006-05-22 18:29:38 GMT', and 'Comments: Auto Submit by CORE Certification Module.' A 'Return to the history page' link is present. A warning states: 'This report contains health care information. Handle only according to the appropriate security and privacy procedures. The error messages that begin with a 'P'-code are Claredi's good-faith interpretation of applicable payers' companion guides; Claredi Terms and Conditions of Use apply.' The report content is on 'Page 1' and includes sections for 'Interchange (L_ISA)', 'Functional Group (L_GS)', 'Transaction 270 (270)', 'Information Source Level (2000A)', 'Information Source Name (2100A)', and 'Information Receiver Level (2000B)'. A red error message is highlighted: 'H20600: The value 'HOME' does not match the format for a 'Federal Tax Identification Number''.

Figure 5.6A

CORE CERTIFICATION TESTING USER MANUAL

You can click on the segment number listed below an error code in the index, and the system will navigate to the error's location in the report page (Figure 5.6B).

To Top		Subscriber Level (2000C) HL*3*2*22*0~
9		
		Subscriber Name (2100C) NM1*IL*1*URBINA*UGUETH***MI*5642796~
10		
		DMG*D8*19840214~
11		
		Subscriber Eligibility or Benefit Inquiry Information (2110C) EQ*30~
12		
		Transaction 270 (270) SE*11*0001~
13		
		Functional Group (L_GS) GE*1*999999999~
14		
		Interchange (L_JSA) IEA*1*111111111~
15		
15		H10912Interchange Ctl No. '111111111' doesn't match ISA's '999999999'.
End of Page 1		To
This report contains health care information. Handle only according to the appropriate security and privacy procedures. The error messages that begin with a 'P'.code are Claredi's good-faith interpretation of applicable payers' companion guides; Claredi Terms and Conditions of Use apply.		

Figure 5.6B

If you select 'Index by segment number' in the drop-down menu, the index displays the errors in order by segment number.

Note that if you do not select 'Download as zipped archive' before you generate the report, the index pane displays error codes only for the report page you are currently viewing. If you select Download as zipped archive, unzip the archive, and open the file with *_main.html in the name, the Velocedi report will display, along with an index of errors for the entire report.

The last parameter on the Summary Report is *Support*: In accordance with the HIPAA Privacy Rule, Customer Support cannot access your file(s) without your permission. If you need to call or email Customer Support for assistance with a specific file, please check the box that enables Customer Support to view that file. Once you have reviewed the file with Customer Support you can uncheck the box to restrict access.

CORE CERTIFICATION TESTING USER MANUAL

If you submit a file and it does not pass, the result will look like Figure 5.7.

[Return to CORE Certification](#) | [Return to Certification Group: 270/271 Data Content](#)

CORE Certification Group: 270/271 Data Content

CORE Script # 2 Create a 271 with the health plan name
Create a valid 271 response transaction indicating the name of the health plan covering the individual specified in the 270 eligibility inquiry

Required Activity Failed – Pending Retry/Completion

YOU HAVE FAILED THIS TEST

Your 271 transaction did not contain the name of the health plan in 2110C EB05 covering the individual specified in the 270 eligibility inquiry that you downloaded for this test.

The last file that you submitted for review is evaluated below:
(Items in red failed. Items in green passed)

You must meet ALL of these requirements before this file will pass:

- CORE-Plan Coverage Description: TEXAS POS(2110C/EB05=TEXAS POS)

Figure 5.7

Note the error item in this example (red text). You would need to correct any errors you see listed and resubmit the file.

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 6: CORE CERTIFICATION TESTING

Before you begin (and if you have chosen to not conduct pre-certification testing before starting the certification activities), you need to set up your Trading Partner Profile (see the Trading Partner Profile section in Chapter 5: CORE Pre-Certification Testing for information). If you are a payer or clearinghouse, you will want to set up your remote host connectivity parameters before you get started with the certification process (see the Payer Connectivity Testing section in Chapter 4). Also, if your system requires a Health Plan Subscriber ID Routing Prefix (e.g., Blues Exchange Routing Code) preceding a Subscriber ID, you will need to enter that value into the system (see Health Plan Subscriber ID Routing Prefix section in Chapter 4).

If you navigate to the CORE Certification Testing page before you establish your Trading Partner Profile, you will see a notification in red text indicating that you need to set up the profile.

When you have set up these parameters, you then need to download and save the CORE Master Test Bed. This test bed consists of the CORE Certification Testing Suite Version 1.0.0 Supplement.pdf, the CORE Phase I Certification Testing Suite.pdf, and the CORE Master Test Bed Data in both wrapped and unwrapped formats. See the CORE Master Test Bed section in Chapter 2 for information about downloading/saving these files.

Once you have prepared your system with the test bed files, you are ready to begin work on the certification activities. The Certification Activities section that follows describes these activities.

Not Applicable Tasks

Note that as you progress through the certification tasks there may be some tasks that do not apply to your organization (designated by an “NA/not applicable” status indicator on the Certification Tasks page), but you are required to provide a Rationale Statement identifying the reasons that you believe that a given task does not apply. For the Batch Acknowledgement and Batch Response Time tasks, if you have determined that your organization does not process 270/271 Eligibility transactions in a batch environment, you only need to upload one Rationale Statement for one of the activities. Once your Rationale Statement has been reviewed and approved, Claredi will set the appropriate status for the remaining Batch Acknowledgement and Batch Response Time tasks.

Once your Trading Partner Profile is set up, you will see a link on the Welcome page that allows you to download and save all 270 and 271 test files that you will need to use for certification activities. *If you want to download them all at once and you have not done so yet, now is the time to do so.* If you download any of the files separately in conjunction with specific activities and later decide to return to the Welcome page to download and save them all at once, there will be a trace number conflict between the “old” and “new” test files.

CERTIFICATION ACTIVITIES

Log in, then click CORE Certification Testing in the left pane. This displays the main CORE Certification Testing page (Figures 6.1A-B).

CORE CERTIFICATION TESTING USER MANUAL

Welcome Clay!

CORE Certification Testing

The CORE Certification Testing area allows you to test your system using the CORE Test Bed Data for all the test scripts required to apply for your CORE Certification Seal. You must complete all of the tasks in the CORE Certification Testing area successfully prior to applying for your CORE Certification Seal. You may also continue to use this area after you have completed your CORE Certification to ensure your system retains its capabilities.

Each of the CORE Certification Testing sections below corresponds to sections of the CORE Certification Test Suite. Please refer to CORE Certification Test Suite documentation for detailed requirements of each test script. The 270/271 Data Content as well as the Real Time and Batch Acknowledgement test scripts in the CORE Certification Testing area rely on the use of the CORE Master Test Bed created by CORE. [Click here](#) to be taken to the CORE Master Test Bed page to download the CORE Certification Test Suite documentation and the CORE Master Test Bed data.

The 270/271 Data Content Test Scripts require you to download files to be processed by your system. You may download the files on an individual basis from within the test script, or you may download all 270/271 test files at one time [here](#).

Figure 6.1A

Your CORE Certification Testing tasks

Groups	Number of activities by status	Status Legend:
Pledge Signature	1 <input type="checkbox"/>	<input checked="" type="checkbox"/> : Activity Completed - Passed
Real Time Acknowledgements	5 <input type="checkbox"/>	<input type="checkbox"/> : Activity Submitted - Pending result of assessment
Batch Acknowledgements	9 <input type="checkbox"/>	<input type="checkbox"/> : Required Activity Pending
Companion Document Format	2 <input type="checkbox"/>	<input type="checkbox"/> : Required Activity Failed – Pending Retry/Completion
Connectivity	3 <input type="checkbox"/>	<input checked="" type="checkbox"/> : Activity Not Applicable – Rationale Statement Approved
270/271 Data Content	20 <input type="checkbox"/>	<input type="checkbox"/> : Activity Not Applicable – Pending Review of Rationale Statement
Real Time Response Time	4 <input type="checkbox"/>	<input type="checkbox"/> : Activity Not Applicable – Pending Rationale Statement
Batch Response Time	4 <input type="checkbox"/>	<input checked="" type="checkbox"/> : Activity Not Applicable – Rationale Statement Disapproved
System Availability	3 <input type="checkbox"/>	
CORE Seal Documents	4 <input type="checkbox"/>	

Figure 6.1B

This page shows your overall progress in completing required activities along the path to certification. The number and types of tasks you must complete will vary somewhat depending on your company type. The Status Legend in Figure 6.1B shows what each symbol represents in the progress chart above it.

CORE CERTIFICATION TESTING USER MANUAL

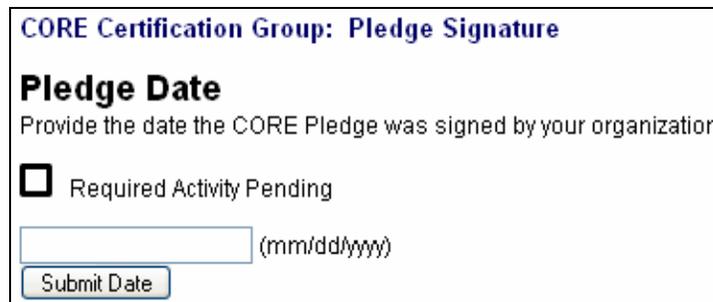
Some certification activities are automatically designated as “Activity Completed – Passed” once requirements are met; other activities require an administrator to review your progress on the activity before this status is designated manually by the administrator. Activities that require manual review will be reviewed within two business days. If upon review the administrator has deemed the activity has failed, the reasons will be identified in a note field on the activity.

Be sure you are familiar with the CORE Phase 1 Rules and Regulations before you start the certification activities.

The certification activities are arranged in the same sequence as the CORE Phase I Certification Testing Suite.pdf. It will be quite useful for you to have the CORE Phase I Certification Testing Suite.pdf available as you work on each individual activity.

Pledge Signature

You will need to indicate when you signed the CORE pledge. To do so, click the **Pledge Signature** link on the CORE Certification Testing page to display the Enrollment activity page (Figure 6.2).



CORE Certification Group: Pledge Signature

Pledge Date
Provide the date the CORE Pledge was signed by your organization

Required Activity Pending

(mm/dd/yyyy)

Figure 6.2

Enter the date, observing the “mm/dd/yyyy” format shown. Then click **Submit Date**. The status for Pledge Signature on the CORE Certification Testing page should now be indicated by an “Activity Completed-Passed” symbol.

From the time you enter the Pledge Signature date you will see a “counter” on the Welcome page that tells you how long you have until you need to pass all certification activities. The countdown begins at 180 days from the date you indicated you signed the pledge.

Real Time Acknowledgements

Your system must pass the real time acknowledgement tests associated with your organization account type as part of the certification process. These tests verify your system’s capability to return valid TA1, 997, and 271 responses.

Click **Real Time Acknowledgements** on the CORE Certification Testing page to display the Real Time Acknowledgements activity page (Figure 6.3).

CORE CERTIFICATION TESTING USER MANUAL

CORE Certification Group: Real Time Acknowledgements

CORE Script # 1 Test the ability to return a TA1 for an invalid X12 Interchange
Download a 270 with an invalid X12 Intechange and return the appropriate TA1 rejecting the entire interchange
 Activity Not Applicable – Pending Rationale Statement

CORE Script # 2 Test the ability to not return a TA1 for a valid X12 Interchange
Download a 270 with a valid X12 Intechange and return a 271
 Required Activity Pending

CORE Script # 3 Test the ability to return a 997 for an invalid Functional Group
Download a 270 with an invalid Functional Group and return a 997 for an invalid Functional Group
 Required Activity Pending

Figure 6.3

Figure 6.3 shows some of the tasks that must be completed for (clearinghouse) certification. For this example, the first task is not applicable because (for purposes of this specific example) this was designated as not being applicable when the account was created; note that a rationale statement still needs to be uploaded to Claredi.

Click on the second task (**CORE Script #2 Test the ability to not return a TA1 for a valid X12 Interchange**) to display the page for this task (Figure 6.4).

CORE Certification Group: Real Time Acknowledgements

CORE Script # 2 Test the ability to not return a TA1 for a valid X12 Interchange
Download a 270 with a valid X12 Intechange and return a 271
 Required Activity Pending

Step 1: [Download 270](#) (You must use this file to create your 271)
Step 2: Produce a corresponding file in compliance with the scenario for this test case
After you have uploaded your response it will be evaluated for compliance with the CORE rule for this scenario

If you have determined that this activity does not apply to your organization [click here](#)

Click 'Browse' button to find the file to upload then click 'Submit' to send the file to Claredi.

Figure 6.4

CORE CERTIFICATION TESTING USER MANUAL

Download and save the 270 file to be used for this activity if you did not download all 270/271 files at once at the beginning of the testing/certification process (see the **Download 270** link in Step 1 in Figure 6.4; note that there are various activities throughout the certification process that will require you to download a specific file).

Follow the instructions carefully, and submit the file to Claredi.

If this activity does not apply to your organization, click on the **click here** link just above the Browse function. This displays the Activity Not Applicable page for this activity (Figure 6.5).

CORE Certification Group: Real Time Acknowledgements

CORE Script # 2 Test the ability to not return a TA1 for a valid X12 Interchange

Download a 270 with a valid X12 Intechange and return a 271

NA Activity Not Applicable – Pending Rationale Statement

You need to upload a rationale statement stating your reasons why this does not apply to you

If you have determined that this activity does apply to your organization [click here](#)

Figure 6.5

You need to submit a rationale statement describing why you believe this specific test (or a portion of it) does not apply to your system. Use the Browse function to submit the statement. An administrator will review the statement and determine if the description is acceptable.

The remaining certification activities are similar to this one. Pay careful attention to all instructions for each activity. Following are brief descriptions of the remaining major activity types.

Batch Acknowledgements

If you process 270/271 Eligibility transactions in a batch environment you must pass batch acknowledgement tests as part of the certification process. These tests verify your system's ability to return valid TA1, 997, and 271 responses. If you have determined that your organization does not process 270/271 Eligibility transactions in a batch environment, you only need to upload one Rationale Statement for one of the activities. Once your Rationale Statement has been reviewed and approved, Claredi will set the appropriate status for the remaining Batch Acknowledgement and Batch Response Time tasks.

Companion Document Format

Depending upon your organization type, this category requires you to submit the table of contents of your 270/271 companion guide and a page of your organization's official 270/271 companion document. The latter must depict its conformance with the format for specifying the 270/271 data content requirements.

CORE CERTIFICATION TESTING USER MANUAL

Connectivity

These tasks test for valid and invalid login attempts as well as verify that your communications server/module creates, assigns, logs, and links the required data elements to HTTP message payload.

270/271 Data Content

These activities test your system's ability to create 270 and 271 transactions with various data intact. See Chapter 5 for more information about this category.

Real Time Response Time

Depending upon your organization account type, you may need to verify that your outermost communication module(s) transmit(s) all required data elements and that it captures, assigns, logs, and links all required data elements from the X12/270 interchange to the submitted X12/271 interchange.

Batch Response Time

If you process 270/271 Eligibility transactions in a batch environment, you will need to verify that your outermost communication module(s) transmit(s) all required data elements and that it captures, assigns, logs, and links all required data elements from the X12/270 interchange to the submitted X12/271 interchange. If you have determined that your organization does not process 270/271 Eligibility transactions in a batch environment, you only need to upload one Rationale Statement for one of the activities. Once your Rationale Statement has been reviewed and approved, Claredi will set the appropriate status for the remaining Batch Acknowledgement and Batch Response Time tasks.

System Availability

Depending upon your organization account type, you may need to upload documents describing your regularly scheduled downtime, including a non-routine downtime notice and identify the method(s) for such publication; and unscheduled/emergency downtime notice, and identify the method(s) for such publication.

CORE Seal Documents

Once you have successfully completed all of the CORE Certification Testing scripts, the Claredi testing administrator will email you a report with the details of your testing results that you can use when you apply for your CORE Seal. You will receive this report within 2 business days of your successful completion of all of the CORE Certification Testing scripts.

From the CORE Seal Documents section you can download the CORE Seal application, HIPAA Attestation form, and IT Exemption form (if you need to request that one or more of your IT systems be exempt from CORE certification testing requirements). You can complete these forms and send them directly to CAQH, or you can elect to have Claredi forward all your documentation to CAQH on your behalf. See Chapter 7 CORE Seal Application for additional information.

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 7: CORE SEAL APPLICATION PACKAGE

Once you have successfully completed all of the CORE Certification Testing scripts, the Claredi testing administrator will email you a report with the details of your testing results that you can use when you apply for your CORE Seal. You will receive this report within 2 business days of your successful completion of all of the CORE Certification Testing scripts.

The CORE Seal Documents section has all the necessary forms you will need to apply for your CORE Seal. From the CORE Seal Documents area you can download the CORE Seal application, HIPAA Attestation form, and IT Exemption form (if you need to request that one or more of your IT systems be exempt from CORE certification testing requirements). These documents make up your CORE Seal Application Package.

You can complete these forms and send your CORE Seal Application Package directly to CAQH, or you can elect to have Claredi forward all your documentation to CAQH on your behalf. If you had any rationale statements approved for activities that did not apply to you and you are sending your CORE Seal Application Package directly to CAQH, you will need to include them with your package.

Any applicable CORE Seal application fees need to be sent directly to CAQH. See the CORE Seal Application for information about application fees.

Request for Claredi to Forward All CORE Seal Application Materials and Test Results to CORE

Upon successful completion of the CORE Certification scripts, you may request Claredi forward all of your test results and any of the documents below to CAQH. You may also send your results directly to CAQH.

If you wish to have Claredi forward your test results and any additional documentation to CAQH, we require you to upload a written request. To do this, Log in, then click CORE Certification Testing in the left pane. Click **CORE Seal Documents** on the CORE Certification Testing page to display the CORE Seal Documents activity page. Click **Request for Claredi to forward all CORE Seal Application materials and test results to CORE**. Click the **Browse** button and locate the written request document and click **Submit**. Claredi will review your request for completeness and will let you know if there are any problems.

If you do not wish Claredi to forward your test results or CORE Seal Application materials to CAQH, click on the **here** link just above the Browse function. This will automatically set the status to “Activity Not Applicable – Rationale Statement Approved” (you will not have to upload a rationale statement for this activity to be successful).

CORE Seal Application Uploaded

If you have indicated that you would like to have Claredi forward your test results to CAQH in the above activity, you may also request Claredi forward your CORE Seal Application to CAQH. You may also send your CORE Seal Application directly to CAQH.

CORE CERTIFICATION TESTING USER MANUAL

If you need a copy of the CORE Seal Application you can download from this page. Once you have completed the form, you may either send the form directly to CAQH or follow the instructions on this page to send in the application to Claredi to forward to CAQH.

If you do not wish Claredi to forward your CORE Seal Application to CAQH, click on the **here** link just above the Browse function. This will automatically set the status to “Activity Not Applicable – Rationale Statement Approved” (you will not have to upload a rationale statement for this activity to be successful).

Upload Attestation Form

If you have indicated that you would like to have Claredi forward your test results to CAQH in the above activity, you may also request Claredi forward your HIPAA Attestation Form to CAQH. You may also send your HIPAA Attestation Form directly to CAQH.

If you need a copy of the HIPAA Attestation Form you can download from this page. Once you have completed the form, you may either send the form directly to CAQH or follow the instructions on this page to send in the application to Claredi to forward to CAQH.

If you do not wish Claredi to forward your HIPAA Attestation Form to CAQH, click on the **here** link just above the Browse function. This will automatically set the status to “Activity Not Applicable – Rationale Statement Approved” (you will not have to upload a rationale statement for this activity to be successful).

IT Exemption Form

If you have indicated that you would like to have Claredi forward your test results to CAQH in the above activity, and if your organization needs to request an exemption for one or more of your systems you may also request Claredi forward your IT Exemption Form to CAQH. You may also send your IT Exemption Form directly to CAQH.

If you need a copy of the IT Exemption Form you can download from this page. Once you have completed the form, you may either send the form directly to CAQH or follow the instructions on this page to send in the application to Claredi to forward to CAQH.

If this does not apply to your organization or if you do not wish Claredi to forward your IT Exemption Form to CAQH, click on the **here** link just above the Browse function. This will automatically set the status to “Activity Not Applicable – Rationale Statement Approved” (you will not have to upload a rationale statement for this activity to be successful).

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 8: PRODUCTION TESTING

The Production Testing area is an optional area that is accessible once you have successfully completed your CORE Certification Testing. This area will allow you to test your system's capability of conforming to the CORE Phase I 270/271 Data Content Rules using your own production data (for example your own members and plan benefits). The Production Testing area also contains additional test scripts for some of the CORE Phase I 270/271 Data Content Rules that are not required for CORE Certification testing. You may also continue to use this area after you have completed your CORE Certification testing to ensure your system retains its capabilities. Testing done in this area does not apply towards CORE Certification testing results, nor are you required to test your system through this area.

Once you have successfully completed Claredi's CORE Certification Testing, click **CORE Certification Testing** in the left navigation pane. You will see a congratulation message at the top, as well as a link for Production Testing in the left navigation pane (Figure 8.1). Click on **Production Testing** to display the main Production Testing page (Figure 8.2).



Figure 8.1

The Production Testing area includes two sections, Production Testing and 270/271 Data Content. The Production Testing area test scripts differ from the CORE Pre-Certification and CORE Certification Testing scripts by allowing you to input the member you wish to use for testing (Figure 8.2) instead of the use of the CORE Master Test Bed members. This allows you to see how your production system measures up to the CORE Phase I Rules.

CORE CERTIFICATION TESTING USER MANUAL

Getting Started	Welcome Clay!
CORE Pre-Certification Testing	You have until 05/15/2007 (179 Days) to complete the activities for certification.
CORE Certification Testing	Production Testing
Production Testing	The Production Testing area will allow you to test your systems capability of conforming to the CORE Phase 1 Rules using your own production data. Testing done through this area will not be applied to your CORE Certification testing, click here to be taken to the CORE Certification page.
User Manual	
Trading Partner Profile	
CORE Master Test Bed	The Production Testing area only validates CORE Phase I Rules for Connectivity and 270/271 Data Content.
Feedback	
Logout	If you wish to test using the CORE Master Test Bed created by CORE against the CORE Phase I Connectivity and 270/271 Data Content Rules, click here .

Your CORE Production Testing tasks

(These tasks do not apply toward CORE Certification)

Groups	Number of activities by status	Status Legend:
Additional Production Testing	11 <input type="checkbox"/>	<input checked="" type="checkbox"/> : Activity Completed - Passed
	1 <input type="checkbox"/>	<input type="checkbox"/> : Activity Submitted - Pending result of assessment
270/271 Data Content	20 <input type="checkbox"/>	<input type="checkbox"/> : Required Activity Pending
		<input type="checkbox"/> : Required Activity Failed – Pending Retry/Completion
		<input checked="" type="checkbox"/> : Activity Not Applicable – Rationale Statement Approved
		<input type="checkbox"/> : Activity Not Applicable – Pending Review of Rationale Statement
		<input type="checkbox"/> : Activity Not Applicable – Pending Rationale Statement
		<input type="checkbox"/> : Activity Not Applicable – Rationale Statement Disapproved

Figure 8.2

Additional Production Testing

The Additional Production Testing area includes additional test scripts for some of the CORE Phase I 270/271 Data Content Rules that are not required for CORE Certification testing. Claredi has identified some of the CORE Phase I Rules that there are no CORE test scripts for and created these additional test scripts.

270/271 Data Content

The 270/271 Data Content scripts are the same as the CORE Certification Testing 270/271 Data Content test scripts except that they do not require the use of the CORE Master Test Bed members.

Once you have entered a member, it can be used for other test scripts, which saves you from having to enter it for each test script if you choose. If you need to test with a different member, type over the existing member and it will be used for that test script and will remain in place until you replace it again with a different member.

NOTE: If you are testing in a different environment than the one you used for CORE Certification testing (such as production vs. test), you may need to update your Trading Partner Profile or Connectivity settings. See Chapter 4 for information on changing these settings.

If your entity type required screen print uploads during certification, those test scripts are not included in the Production Testing area.

Other than this, the Production Testing section works just like the CORE Certification Testing section does.

CORE CERTIFICATION TESTING USER MANUAL

CHAPTER 9: OTHER FUNCTIONALITY

My Contract

You can view the contract you signed by clicking **Account** in the top toolbar, then **My Contract** in the left pane. This displays your contract (Figure 9.1 shows part of the contract).

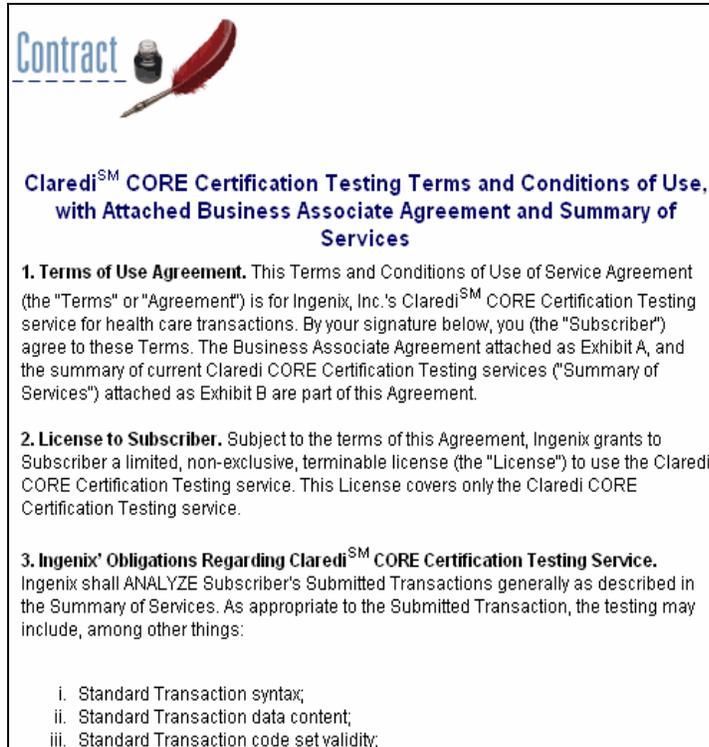


Figure 9.1

My Account Information

You can view your account information at any time. To do so, log in and click **Account** in the top toolbar. Then, click **My Account Info** in the left pane to display the My Account Information page (Figure 9.2 shows part of the page).

CORE CERTIFICATION TESTING USER MANUAL

My Account Information

This information is for Claredi's use and will *not* appear in the Claredi Directory. The Claredi Directory will only display information specified under "My Certifiable Entities" in the left menu. This information is for Claredi's use and will *not* appear in the Claredi Directory.

To change your password, click [here](#).

Fields marked with * are required.

Username: ch1357

User Contact Information

First Name: Clay *

Last Name: Ringhouse *

Title:

E-mail Address: ch@claredi.com *

Company Information

Company Demographic: Clearinghouse *
Select the option that best describes your company.

Company Name: Big Clearinghouse *

Address: 498 N. 900 W. *

Figure 9.2

You can change or update this information at any time by entering the appropriate information in the text field(s) and clicking **Save Changes** at the bottom of the page.

My Invoice/Receipt

You can view your account receipt as well as the status of payment. To do so, log in and click **Account** in the top toolbar. Then, click **My Invoice/Receipt** in the left menu to display the Payment page (Figure 9.3).

Payment 

Below is a list of Invoices and Receipts associated with this account. Click on one for details.

Purchase Date	Description	Status
November 15, 2006	Claredi Account Purchase	Paid

Figure 9.3

Note the status for each line item. To see the invoice/receipt, click the date link (Figure 9.4).

CORE CERTIFICATION TESTING USER MANUAL

Thank You ★★★★★

Invoice

Sold To: Clearinghouse 498 N. 900 W. Kaysville, UT 84037	Sold By: Ingenix 12125 Technology Drive Eden Prairie, MN 55344 (801) 982-3144
--	--

Tax ID: 41-1858498

Method of Payment: Check	Check Number: 1234	Date: Nov 15 2006	Account ID: 1010 Invoice Number: 477
------------------------------------	------------------------------	-----------------------------	--

Item	Amount
1 year subscription to Claredi testing and certification service for CORE Certification - Clearinghouse	\$6000.00
Total:	\$6000.00

This is your Invoice. Please print as many copies as you need.

For Tax purposes, you can download a Ingenix W9 Form.

Figure 9.4

Change Password

If you need to change your password, do the following:

Log in and click **Account** at the top. Then, click **Change Password** in the left menu to display the Change Password page (Figure 9.5).

Change Password.

Modifying user: **ch1357**

Remember to notify any others from your company who use this account that the password has been changed.

Current Password:	<input type="text"/>
New Password:	<input type="text"/> Password must be at least 7 characters long, and should contain a mix of numbers and letters
Confirm New Password:	<input type="text"/>

Figure 9.5

CORE CERTIFICATION TESTING USER MANUAL

Enter the old password, then enter the new password and confirm it. Click **Save Password** to save changes. The new password will be required the next time you log in.

Feedback

Claredi appreciates your feedback on our CORE Certification Testing service. If you would like to provide feedback, click **CORE Certification Testing** in the top toolbar, then **Feedback** in the left menu to display the Feedback page (Figure 9.6).

Thank you for using Claredi's services. We appreciate your feedback. Please share your thoughts about any aspect of our service.

Note: Feedback submitted here does not go to Claredi Customer Support. If you need to submit a technical support ticket (via the Issue Tracking System), need assistance with your account, or have questions about the technical aspects of testing or certification, click Support in the top navigation bar.

Comments:

How did you hear about Claredi?

- Through WEDI/SNIP
- Through STFCS
- Through my vendor or clearinghouse
- Trade Show Referral
- Industry Contacts
- Through my payer
- Through a State HIPAA Group
- Press/Article in Trade Journal
- Other:

When do you anticipate having your systems ready for certification?

▼

Figure 9.6

Enter your feedback in the appropriate fields and click **Submit Feedback**.

Note that this information is not sent to Claredi Customer Support.

CORE CERTIFICATION TESTING USER MANUAL

APPENDIX A: CUSTOMER SUPPORT

How to Seek Assistance with CORE Certification testing

There are several ways to obtain customer support for Claredi's CORE Certification Testing system:

This user manual has the answers to many questions. Before you call Customer Support or enter a ticket using the Issue Tracking System (see the Issue Tracking System section below), you should read this manual thoroughly to be sure that your question or issue is not already addressed here.

The Claredi CORE Certification Testing site allows you to enter a 'ticket' directly into Claredi's automated Customer Support system (see the *Issue Tracking System* section that follows). Tickets entered in this manner will be processed by Customer Support representatives and you will be notified of Claredi's resolution to your issue via your account.

Call Claredi Customer Support at (866) 444-0339, Option 5 between 7:00 AM and 5:00 PM Mountain Time on weekdays.

Issue Tracking System

If you encounter any problems with the Claredi CORE Certification Testing system, the best way to document the issue for Claredi Customer Support is to use the Issue Tracking System. This system allows you to submit a 'ticket' to Customer Support that includes details of the problem you are experiencing. You can also use this functionality to track the progress of an existing ticket.

To Use the Issue Tracking System

1. Click **Support** in the top toolbar, then click **Issue Tracking System** on the main menu to display the Customer Issue Tracking System page (Figure A).



The screenshot shows the 'Claredi Customer Support' interface. At the top, it says 'Customer Issue Tracking System'. Below that, there is a paragraph explaining the system: 'Claredi maintains a database of issues submitted to us by our customers and our internal Quality Assurance staff. This page allows you to submit a ticket directly into our internal system to be handled by our expert customer support representatives. You can also track the progress on issues you submit using this tool.' There is a 'Create New Ticket' button. Below that, there is a 'Filter ticket list by status:' label followed by a dropdown menu currently set to 'All Non-Closed'. At the bottom, there is a table header with four columns: 'Ticket ID', 'Subject', 'Date Opened', and 'Status'.

Figure A

CORE CERTIFICATION TESTING USER MANUAL

2. Click **Create New Ticket**. This displays the Create a New Ticket page (Figure B).

*Ticket Subject	837 issue
*Name of Person to Contact	John Doe
*Email Address	johndoe@whatever.com
*Phone Number	(801) 555-1212
<input type="button" value="Create Ticket"/>	

Figure B

3. Enter the ticket subject, your name, your email address, and phone number. Then click **Create Ticket**. This displays the Ticket Details page (Figure C).

Ticket ID: 566	Ticket Subject: 837 issue	
Contact Person: John Doe	Account Username: jbl14	Date Opened: 2003-08-07 14:44:19
Email Address: johndoe@whatever.com	Phone Number: (801) 555-1212	Status: Open
<input type="button" value="New Note"/>		

Figure C

4. Here, you can review the information for the ticket you are submitting. To add an explanatory note for the ticket, click **New Note**, enter the note, and click **Save Note** to add the note to the ticket.

To Track a Ticket

1. On the Home page, click **Issue Tracking** in the top toolbar. This displays the Claredi Customer Support/Customer Issue Tracking System page (Figure D).

Claredi Customer Support

Customer Issue Tracking System

Claredi maintains a database of issues submitted to us by our customers and our internal Quality Assurance staff. This page allows you to submit a ticket directly into our internal system to be handled by our expert customer support representatives. You can also track the progress on issues you submit using this tool.

Filter ticket list by status:

Ticket ID	Subject	Date Opened	Status
13125	Output queue	2005-01-10 08:51:05	Open

Figure D

CORE CERTIFICATION TESTING USER MANUAL

Any tickets you have created are listed here. You can filter the view of the ticket list by a variety of parameters using the Filter ticket list by status drop-down list (Figure E).

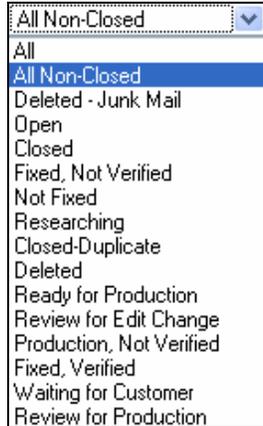


Figure E

Click on the ticket you want to view in the Subject column. This displays the Ticket Details page (Figure F).

Claredi Customer Support

Ticket Details

This ticket is recorded in the Claredi Issue Tracking System. To ADD or EDIT notes, please click on the New Note Button or Edit Note link below. (Notes entered by Customer Support are not editable.)

Ticket ID: 13125	Ticket Subject: Output queue	
Contact Person: John Doe	Account Username: CLAREDI_faciledi	Date Opened: 2005-01-10 08:51:05
Email Address: john.doe@claredi.com	Phone Number: 866-444-0339	Status: Open

[New Note](#)

Note Entered by CLAREDI_faciledi on 2005-01-10 09:06:37 [Edit this note.](#)

Have advised Sylvia of the problem. She is researching and will let me know ASAP.

James
Customer Support

Note Entered by CLAREDI_faciledi on 2005-01-10 08:51:40 [Edit this note.](#)

Default Accept Routing Queue does not seem to be accepting files routed to it.

John Doe

Figure F

CORE CERTIFICATION TESTING USER MANUAL

FAQ

A list of frequently asked questions has been compiled for your convenience. To view this list, click FAQ in the top toolbar to display the FAQ page (Figure G).

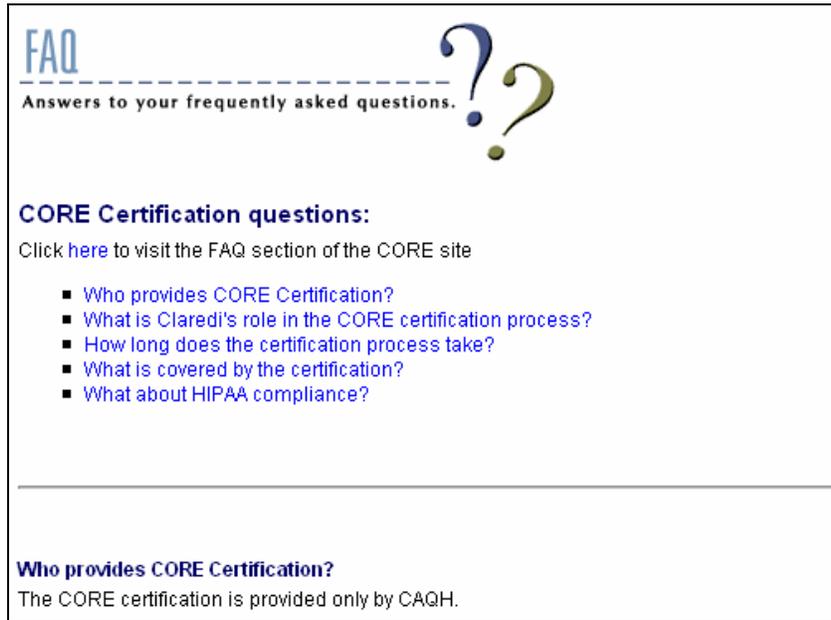


Figure G

Click on a link in the question section to navigate to that question (and answer) on the page.

Contact Us

You can contact Claredi for purposes not related to CORE Certification testing by clicking **Support** in the top toolbar, then **Contact Us** in the left pane (Figure H).



Figure H