



Medicaid Information  
Technology System

**State & Local Government Solutions**

---

**Medicaid Information Technology System (MITS)**

# **Trading Partner Enrollment and Maintenance Participant Guide**

**October 19, 2010**

**HP Enterprise Services  
Suite 100  
50 West Town Street  
Columbus, OH 43215**

---

# Table of Contents

Course Overview.....	1
Overview.....	1
Objectives .....	1
Agenda .....	2
Searching for a Trading Partner.....	3
What .....	3
Who .....	3
When.....	3
Relevance.....	3
Requirements .....	3
How To .....	3
Success.....	4
Next Steps .....	4
Practice #1.....	4
Practice #2.....	5
Summary .....	6
Adding a Trading Partner .....	7
What .....	7
Who .....	7
When.....	7
Relevance.....	7
Requirements .....	7
Guidelines .....	7
How To .....	8
Success.....	8
Practice.....	8
Summary .....	9
Adding or Modifying Trading Partner and Covered Provider Relationships .....	10
Relevance.....	10
Requirements .....	10
How To .....	10
Success.....	11
Practice.....	11
Summary .....	11
Changing Contact Information for a Trading Partner Record .....	12
What .....	12
Who .....	12
When.....	12
Relevance.....	12
Requirements .....	12
How To .....	12
Success.....	13
Practice.....	13
Summary .....	14
Modifying Trading Partner Base Information.....	15
What .....	15
Who .....	15
When.....	15

Relevance.....	15
Requirements .....	15
How To .....	15
Success.....	16
Practice.....	16
Summary .....	16
Setting Up Trading Partners With Electronic X12 Transaction Interchange .....	17
What .....	17
Who .....	17
When.....	17
Relevance.....	17
Requirements .....	17
How To .....	17
Success.....	18
Practice.....	18
Summary .....	19
Adding or Modifying Carrier Details.....	20
What .....	20
Who .....	20
When.....	20
Relevance.....	20
Guidelines .....	20
How To .....	20
Success.....	21
Next Steps .....	21
Practice.....	21
Summary .....	22
Adding or Modifying Return Reason Codes .....	23
What .....	23
Who .....	23
When.....	23
Relevance.....	23
How To .....	23
Success.....	24
Next Steps .....	24
Practice.....	24
Summary .....	25
Searching for an EDI Transaction Record .....	26
What .....	26
Who .....	26
When.....	26
Relevance.....	26
How To .....	26
Success.....	27
Practice.....	27
Summary .....	27
Searching for File Transmission Details .....	28
What .....	28
Who .....	28
When.....	28

Relevance..... 28  
Guidelines ..... 28  
How To ..... 28  
Success..... 29  
Practice..... 29  
Summary ..... 30  
Review ..... 31  
    Objectives ..... 31

## Course Overview

### Overview

The goal of this course is to provide you with the knowledge and common skills necessary to perform tasks related to trading partner enrollment and maintenance that are contained within the Ohio MITS (Medicaid Information Technology System).



### Objectives

After completing this course, you should be able to:

- Search for a trading partner
- Add a trading partner
- Add or modify information about the relationship between the trading partner and covered provider
- Change contact information for a trading partner record
- Modify trading partner base information
- Set up trading partners with electronic X12 transaction interchange in test and production modes
- Add or modify carrier details
- Add or modify return reason codes
- Search for an Electronic Data Interchange (EDI) transaction record
- Search for file transmission details

## Agenda

Topic	Time in Minutes
Welcome and Introductions	15
Course Overview	5
Searching for a Trading Partner	20
Adding a Trading Partner	30
Adding or Modifying Trading Partner and Covered Provider Relationships	30
<b>Break</b>	<b>15</b>
Changing Contact Information for a Trading Partner Record	30
Modifying Trading Partner Base Information	30
Setting Up Trading Partners With Electronic X12 Transaction Interchange	30
<b>Lunch</b>	<b>60</b>
Adding or Modifying Carrier Details	30
Adding or Modifying Return Reason Codes	30
<b>Break</b>	<b>15</b>
Searching for an EDI Transaction Record	30
Searching for File Transmission Details	30
Review	10
<b>Total</b>	<b>410</b>

# Searching for a Trading Partner

## What

In this topic you learn how to search for and view a trading partner.

This task is about searching for and viewing trading partner information. This is the first step to performing any maintenance of the trading partner information. After you locate the desired trading partner, the summary information for that trading partner appears in the Trading Partner Information panel for your review.

**Note:** If only one trading partner matches your search criteria, then the Trading Partner Information panel automatically appears.

## Who

EDI/Help Desk staff members are responsible for performing this task.

## When

Perform this task first when you want to perform maintenance on trading partner information.

## Relevance

This task enables the EDI staff and/or Help Desk staff to locate the trading partner for which they need to view information.

## Requirements

You need search criteria in order to generate the search results.

## How To

Follow these steps from the MITS home page to search for and view a trading partner:

Step	Action
1	Click <b>EDI</b> .
2	Click <b>search</b> .
3	Type or select information in the available search fields.

Step	Action
4	Click <b>search</b> .
5	Click the row for the desired trading partner to view the trading partner information.

## Success

You have successfully performed a search when a list of trading partners appears in the Search Results.

## Next Steps

If necessary, perform maintenance to trading partner information.

## Practice #1

Search for a trading partner using this information:

**Name:** K Mart Corp

When you complete the practice, your results should be similar to the one shown here:



### Practice #2

Search for a trading partner using this information:

**ID:** 0000046 (Walgreen Company)

When you complete the practice, your results should be similar to the one shown here:

The screenshot shows the Ohio Medicaid Information Technology System interface. At the top, the logo 'Ohio.gov' is displayed next to the text 'Medicaid Information Technology System'. Below this is a navigation menu with links: Home, Claims, Drug, EDI, Healthchek, Financial, Managed Care, MAR, Prior Authorization, and Prov Site. A secondary menu includes: home, search, information, related data, rpts and letters, transaction search, and file tran. A search bar is present with the text 'Trading Partner search by:' followed by input fields for 'Name' and 'Provider ID', and a '[ Search ]' button. Below the search bar is a section titled 'Trading Partner Information' which displays details for a specific trading partner. The details are as follows:

Trading Partner ID	0000046	Business Contact	NELL
Trading Partner Name	WALGREEN COMPANY	Bus Contact Phone	(594
Address Line 1	3709 TRAINER AVENUE	Bus Contact Email	JULIE
Address Line 2	MARTIN BENNETT	Secondary Contact	
City	HUTCHINSON	Sec Contact Phone	
State/Zip	OH 35782-7777	Sec Contact Email	
Tax ID			

### Summary

In this topic you learned how to search for and view a trading partner.

# Adding a Trading Partner

## What

In this topic you learn how to add a trading partner.

This task is performed to add a new trading partner to Ohio MITS. The new trading partner initially has a status of **not enrolled**.

## Who

EDI/Help Desk staff members are responsible for performing this task.

## When

This task is performed by an EDI/Help Desk staff member when a new trading partner needs to be added to MITS.

## Relevance

In order for a new trading partner to transmit EDI information to MITS, the EDI staff must first add the trading partner to MITS followed by approval and testing of the trading partner's capabilities.

The trading partner will provide their information on the public portal which gets imported into interchange. Once imported and the trading partner agreement is received, then an EDI help desk person will provide access to submit test files.

Trading partners logging in thru the public portal will be the typical method for adding a new trading partner but you also have the option to do it here.

## Requirements

To begin this task an EDI/Help Desk staff member must have an application for adding a new trading partner to MITS.

## Guidelines

Before a new trading partner can be active in MITS, the trading partner **must** create a profile, receive approval, and pass all EDI testing.

## How To

Follow these steps from the MITS home page to add a trading partner:

Step	Action
1	Click <b>EDI</b> .
2	Click <b>search</b> .
3	Click <b>add</b> . A blank Trading Partner Information panel appears, and the required trading partner panels open.
4	Type or select information in all required fields on the <b>Base Information</b> panel. <b>Note:</b> The initial status is <b>not_enrolled</b> .
5	Type or select information in all required fields on the <b>Contacts</b> panel. <b>Note:</b> Ohio MITS requires one business contact, one secondary contact, and one technical contact for each trading partner.
6	Select from the available transaction sets on the <b>Transaction Sets</b> panel. <b>Note:</b> You must select transaction sets in pairs: a compliance set and either an inbound or outbound set.
7	Click <b>save</b> .

## Success

You have successfully completed this task when a **Save was Successful** confirmation message appears.

## Practice

Create (add) a trading partner using this information:

- **Name:** Use your own name
- **Address:** 123 S. Main St
- **City:** Cleveland
- **State:** Ohio
- **Zip:** 23578-1261
- **Tax ID:** 765344912
- **Status:** Active
- **Contacts:**
  - **Secondary:**
    - **Name:** Tom Jones
    - **Phone:** (703) 567-8844

- **Email:** tjones@topcom.com
- **Technical:**
  - **Name:** Sally James
  - **Phone:** (248) 357-9913
  - **Email:** sjames@ohiost.edu
- **Business:**
  - **Name:** Ben Wilson
  - **Phone:** (602) 345-9874
  - **Email:** bwilson@hp.com
- **Transaction sets:** 270: Compliance: Test: 004010X092A1 and 270: Inbound: Test: 004010X092A1

When you complete the practice, a message appears, saying your save was successful, and the Trading Partner Information panel shows that a Trading Partner ID was assigned, as shown in this example:

The screenshot shows the Ohio.gov Medicaid Information Technology System interface. The top navigation bar includes links for Home, Claims, Drug, EDI, Healthchek, Financial, Managed Care, MAR, and Prior Auth. Below this is a search bar with options for home, search, information, related data, rpts and letters, and transaction sets. The main content area displays Trading Partner Information for a partner named KENNETH FACKLER. The Trading Partner ID is 0019251, which is highlighted with a red box. Other details include Address Line 1 (100 MAIN), Address Line 2, City (COLUMBUS), and State/Zip (OH 43215). The interface also shows buttons for Business, Bus Cont, Bus Cont, and Secondary.

Trading Partner Information	
Trading Partner ID	0019251
Trading Partner Name	KENNETH FACKLER
Address Line 1	100 MAIN
Address Line 2	
City	COLUMBUS
State/Zip	OH 43215

## Summary

In this topic, you learned how to add a trading partner.

# Adding or Modifying Trading Partner and Covered Provider Relationships

## Relevance

This task enables MITS to send the payment information details for covered claims to the correct trading partner for a covered provider.

If the EDI staff member does not perform this task, the provider will not receive confirmation details for payments made that are associated with Medicaid claims.

## Requirements

To begin this task the EDI/Help Desk staff member needs the updated trading partner information.

## How To

Follow these steps from the MITS home page to add or modify information about the relationship between the trading partner and covered provider:

Step	Action								
1	Perform the steps required to search for a trading partner.								
2	Click the row to select the desired trading partner.								
3	Click <b>Covered Providers</b> .								
4	Modify trading partner and covered provider relationships by following these steps: <table border="1" data-bbox="371 1362 1373 1751"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Add a covered provider to a trading partner</td> <td>           a. Click <b>add</b>.            b. Type or select information in the required fields.         </td> </tr> <tr> <td>End a covered provider relationship with a trading partner</td> <td>           a. Click the row to select the desired covered provider.            b. Type a new date in the <b>End Date</b> field.         </td> </tr> <tr> <td>Delete a covered provider from a trading partner</td> <td>           a. Click the row to select the desired covered provider.            b. Click <b>delete</b>.         </td> </tr> </tbody> </table>	TO:	THEN:	Add a covered provider to a trading partner	a. Click <b>add</b> . b. Type or select information in the required fields.	End a covered provider relationship with a trading partner	a. Click the row to select the desired covered provider. b. Type a new date in the <b>End Date</b> field.	Delete a covered provider from a trading partner	a. Click the row to select the desired covered provider. b. Click <b>delete</b> .
TO:	THEN:								
Add a covered provider to a trading partner	a. Click <b>add</b> . b. Type or select information in the required fields.								
End a covered provider relationship with a trading partner	a. Click the row to select the desired covered provider. b. Type a new date in the <b>End Date</b> field.								
Delete a covered provider from a trading partner	a. Click the row to select the desired covered provider. b. Click <b>delete</b> .								
5	Click <b>save</b> .								

## Success

You have successfully completed this task when a **Save was Successful** confirmation message appears.

## Practice

Add a covered provider to a trading partner record using this information:

- Search for and display the trading partner provided by your instructor
- Open the **Covered Providers** panel and then click **add**
- Type the number provided by your instructor in the **Provider ID** field
- Select the **835** transaction type
- Change the **End Date** field to the next occurrence of your birthday, including the year
- Save the record

You have successfully completed this practice when your Covered Providers panel looks similar to this example:

The screenshot displays the 'Trading Partner Maintenance' interface. At the top, there are tabs for 'Base Information', 'Contacts', and 'Covered Providers'. Below the tabs, a message box states: 'The following messages were generated: Message Description Base Information - Save was Successful'. Below this, the 'Covered Providers' panel is visible, showing a table with columns for Provider ID, Provider Name, Effective Date, End Date, and Transaction Type. The table contains one entry: 9994812, SMITHA PATEL MD, 10/05/2010, 02/23/2011, 835. Below the table, there is a form to add a new provider with fields for Provider ID (8510022489), Provider Name (SMITHA PATEL MD), Transaction Type (835), Effective Date (10/05/2010), and End Date (02/23/2011). The 'add' button is highlighted.

## Summary

In this topic you learned how to add or modify information about the relationship between the trading partner and covered provider.

# Changing Contact Information for a Trading Partner Record

## What

In this topic you learn how to change contact information for a trading partner record.

You perform this task to update contact information for a trading partner in MITS. MITS requires a business, secondary, and technical contact for each trading partner.

**Note:** The previous system required only two contacts, so information converted from that system has only business and technical contact information.

## Who

EDI/Help Desk staff members are responsible for performing this task.

## When

An EDI/Help Desk staff member performs this task when a trading partner notifies the State of Ohio of a change in contact information via mail, email, telephone, or other trading partner contact.

## Relevance

This task ensures that MITS contains the most up-to-date information associated with trading partners.

## Requirements

To begin this task the EDI/Help Desk staff member needs the updated trading partner information.

## How To

Follow these steps from the MITS home page to change contact information for a trading partner record:

Step	Action
1	Perform the steps required to search for a trading partner.

Step	Action								
2	Click the row to select the desired trading partner.								
3	Click <b>Contacts</b> .								
4	Modify trading partner contact information by following these steps: <table border="1" data-bbox="371 489 1377 802"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Add contact information</td> <td>a. Click <b>add</b>. b. Type or select information in the required fields.</td> </tr> <tr> <td>Update contact information</td> <td>a. Click the row for the desired contact. b. Type or select information in the required fields.</td> </tr> <tr> <td>Delete contact information</td> <td>a. Click the row for the desired contact. b. Click <b>delete</b>.</td> </tr> </tbody> </table>	TO:	THEN:	Add contact information	a. Click <b>add</b> . b. Type or select information in the required fields.	Update contact information	a. Click the row for the desired contact. b. Type or select information in the required fields.	Delete contact information	a. Click the row for the desired contact. b. Click <b>delete</b> .
TO:	THEN:								
Add contact information	a. Click <b>add</b> . b. Type or select information in the required fields.								
Update contact information	a. Click the row for the desired contact. b. Type or select information in the required fields.								
Delete contact information	a. Click the row for the desired contact. b. Click <b>delete</b> .								
5	Click <b>save</b> .								

## Success

You have successfully completed this task when a **Save was Successful** confirmation message appears.

## Practice

Change contact information for a trading partner record using this information:

- Search for and display the trading partner provided by your instructor, the same trading partner you used in the previous practice
- Open the **Contacts** panel
- **Contact:** Technical
- **Contact Name:** Change to your name
- **Email:** Change to TRAINED@CLASS.COM
- Save the trading partner record

You have completed the practice successfully when your screen is similar to this example:

<b>Status</b>	ACTIVE	<b>Tech Contact Phone</b>	(614)555-1212
<b>Status Change Date</b>	09/08/2010	<b>Tech Contact Email</b>	TRAINED@CLASS.COM
<b>Provider Summary</b>	835 Active - 1 835 Inactive - 0	<b>Transaction Sets</b>	270 Compliance Test 004010X092A1
		<b>Covered Providers</b>	9994812 (835) 09/08/2010-02/23/2011

<b>Trading Partner Maintenance</b>		Select area to add or modify below.		Prefs Top Bot ? ⌵
Trading Partner	<b>Base Information</b>	<b>Contacts</b>	Covered Providers	
	Transaction Sets		Carrier Detail	

The following messages were generated:			
Message Description	Panel	Field	Row
Base Information - Save was Successful	Base Information		

<b>Base Information</b>				Top Nav ? A ⌵ X
<b>Contacts</b>				Top Nav ? A ⌵ X
Type	Name	Phone	Email	
BUSINESS	JOHN SMITH	(614)555-1212	JSMITH@NOMAIL.COM	
SECONDARY	JOHN SMITH	(614)555-1212	JSMITH@NOMAIL.COM	
TECHNICAL	YOUR NAME	(614)555-1212	TRAINED@CLASS.COM	

Type	TECHNICAL	*Name YOUR NAME		Type changes below.
*Phone	(614)555-1212	*Email TRAINED@CLASS.COM		

## Summary

In this topic you learned how to change contact information for a trading partner record.

## Modifying Trading Partner Base Information

### What

In this topic you learn how to modify trading partner base information.

This task enables you to update basic information for a trading partner in MITS. The basic information includes mailing address, tax information, and the status of the trading partner. The most common reason for making changes to base information is a status change.

### Who

EDI/Help Desk staff members are responsible for performing this task.

### When

An EDI/Help Desk staff member performs this task when a trading partner notifies the State of Ohio of a change in basic information via mail, email, telephone, or other trading partner contact.

### Relevance

This task ensures that MITS contains the most up-to-date information associated with trading partners.

### Requirements

To begin this task the EDI/Help Desk staff member needs the updated trading partner information.

### How To

Follow these steps from the MITS home page to modify trading partner base information:

Step	Action
1	Search for and select the desired trading partner.
2	Click <b>Base Information</b> .
3	Type or select the desired information in the fields on the <b>Base Information</b> panel.

Step	Action
4	Click <b>save</b> .

## Success

You have successfully completed this task when a **Save was Successful** confirmation message appears.

## Practice

Change the base information for a trading partner record using this information:

- Search for and display the trading partner provided by your instructor, the same trading partner you used in the previous practice
- Open the **Base Information** panel
- **Address Line 1**: Change to the facility where you are receiving training
- Save the trading partner record

You have completed the practice successfully when your screen is similar to this example:

The screenshot displays the 'Trading Partner Maintenance' application. The top navigation bar includes 'Trading Partner Maintenance', 'Select area to add or modify below.', and utility buttons like 'Prefs', 'Top', 'Bot', '?', and 'A'. Below this, there are tabs for 'Base Information', 'Contacts', 'Covered Providers', 'Transaction Sets', and 'Carrier Detail'. The 'Base Information' panel is active, showing fields for 'Trading Partner ID' (0019252), '\*Trading Partner Name' (TRAINING TRADING PARTNER), '\*Address Line 1' (YOUR TRAINING FACILITY), 'Address Line 2', '\*City' (COLUMBUS), '\*State' (OH), 'Zip\*+4' (43215), '\*Tax ID' (123456789), '\*MCO' (Yes/No), '\*Status' (ACTIVE), and 'Status Change Date' (09/08/2010). A red box highlights a message box that says 'The following messages were generated:' with a table below it:

Message Description	Panel	Field	Row
Base Information - Save was Successful	Base Information		

## Summary

In this topic you learned how to modify trading partner base information.

# Setting Up Trading Partners With Electronic X12 Transaction Interchange

## What

In this topic you learn how to set up trading partners with electronic X12 transaction interchange in test and production modes.

You perform this task to establish electronic X12 transaction interchange for a trading partner in MITS. The transaction sets are always assigned in pairs: one for compliance and one for the actual transaction. The EDI/Help Desk staff members first assign the transaction set in test mode, and then after testing is complete and all approvals are received, EDI/Help Desk staff members assign the production transaction sets.



### Compliance Test

This is a test to check the HIPAA compliance of the data.



### Outbound Test

This test translates the data from its original format to X12.

## Who

EDI/Help Desk staff members are responsible for performing this task.

## When

An EDI/Help Desk staff member performs this task when a trading partner notifies the State of Ohio of a change of transaction set transmission capabilities.

## Relevance

This task ensures that MITS contains the most up-to-date information associated with trading partners.

## Requirements

To begin this task the EDI/Help Desk staff member needs the updated trading partner information.

## How To

Follow these steps from the MITS home page to set up trading partners with electronic X12 transaction interchange in test and production modes:

Step	Action						
1	Search for and select the desired trading partner.						
2	Click <b>Transaction Sets</b> .						
3	Assign or de-assign available transaction sets by following these steps: <table border="1" data-bbox="371 600 1373 879"> <thead> <tr> <th>TO:</th> <th>THEN:</th> </tr> </thead> <tbody> <tr> <td>Assign available transaction sets</td> <td>           a. Select the desired transaction set pairs to assign in the <b>Available</b> column.            b. Click the left arrow.         </td> </tr> <tr> <td>De-assign available transaction sets</td> <td>           a. Select the desired transaction set pairs to de-assign in the <b>Assigned</b> column.            b. Click the right arrow.         </td> </tr> </tbody> </table>	TO:	THEN:	Assign available transaction sets	a. Select the desired transaction set pairs to assign in the <b>Available</b> column. b. Click the left arrow.	De-assign available transaction sets	a. Select the desired transaction set pairs to de-assign in the <b>Assigned</b> column. b. Click the right arrow.
TO:	THEN:						
Assign available transaction sets	a. Select the desired transaction set pairs to assign in the <b>Available</b> column. b. Click the left arrow.						
De-assign available transaction sets	a. Select the desired transaction set pairs to de-assign in the <b>Assigned</b> column. b. Click the right arrow.						
4	Click <b>save</b> .						

## Success

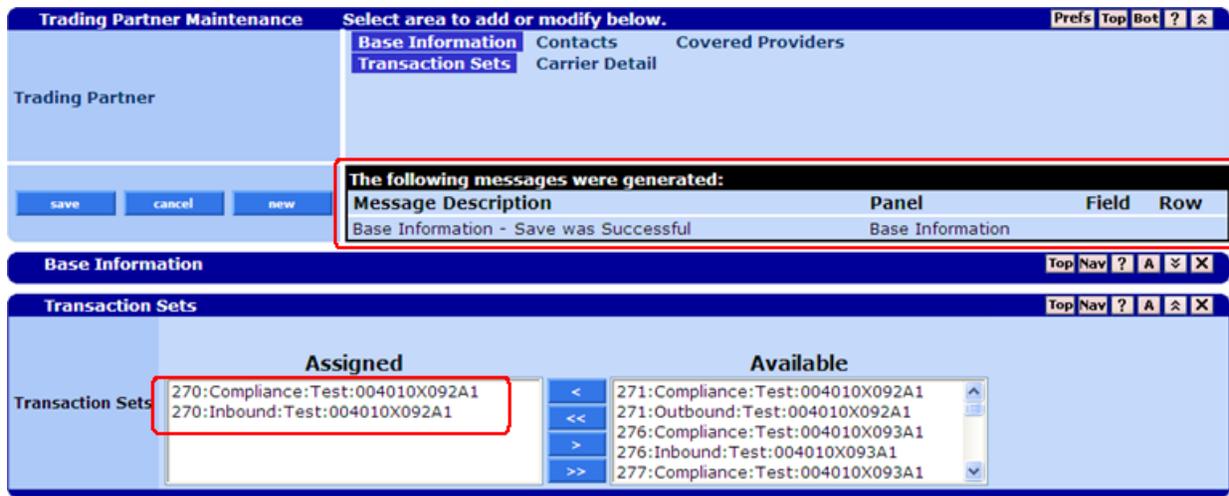
You have successfully completed this task when a **Save was Successful** confirmation message appears.

## Practice

Change the transaction set information for a trading partner record using this information:

- Search for and display the trading partner provided by your instructor, the same trading partner you used in the previous practice
- Open the **Transaction Sets** panel
- Remove all existing transaction set information
- **Transaction sets to add:** 270: Compliance: Test: 004010X092A1 and 270: Inbound: Test: 004010X092A1
- Save the trading partner record

When you complete the practice successfully, verify that your screen is similar to this example:



## Summary

In this topic you learned how to set up trading partners with electronic X12 transaction interchange in test and production modes.

## Adding or Modifying Carrier Details

### What

In this topic you learn how to add a new carrier with supporting details or modify the details for an existing carrier.

### Who

EDI/Help Desk staff members are responsible for performing this task.

### When

You perform this task when the Third Party Liability (TPL) staff sends an internal communication to the EDI/Help Desk requesting a change to carrier details.

### Relevance

The carrier details provide the State of Ohio with the ability to send out the 270 Health Care Claim Eligibility Benefit Inquiry and 271 Health Care Claim Eligibility Benefit Response paired transaction files to the six largest insurance carriers in order to verify coverage for recipients.

If you do not make the appropriate addition or changes, the State of Ohio will **not** be able to verify coverage for recipients.

### Guidelines

Follow these guidelines when performing this task:

- Enter the information as found in the Carrier's Companion Guide.
- Make an entry in all fields on the Carrier Detail panel. All fields are required though they are not marked with an asterisk (\*).

### How To

Follow these steps from the MITS home page to add or modify carrier details:

Step	Action
1	Search for and select the desired trading partner.
2	Click <b>Carrier Detail</b> .

Step	Action
3	Type the desired carrier identification code in the <b>Carrier</b> field and then press <b>Tab</b> . <b>Note:</b> You can also use the <b>Search</b> link to locate the carrier by name, number, NAIC, or NPI.
4	Type information or make a selection from a drop-down list in every field. <b>Note:</b> All fields are required.
5	Click <b>save</b> .

### Success

You have successfully completed this task when a confirmation message displays.

### Next Steps

After you have received a confirmation message, verify that you entered your changes or new entry correctly.

### Practice

Change the carrier detail information for a trading partner record using this information:

- Search for and display the trading partner provided by your instructor, the same trading partner you used in the previous practice
- Open the **Carrier Detail** panel
- **Carrier number to add to the record:** 00147 (Southern Health Services)
- **In all drop-down lists:** select the highest alphabetic code available  
Example: XX is higher than PI.
- **Max. Transactions Per File:** 50
- **In all other text entry fields:** type the number 1
- Save the trading partner record

When you complete the practice successfully, verify that your screen is similar to this example:

Trading Partner Maintenance		Select area to add or modify below.	
Trading Partner	<b>Base Information</b>	Contacts	Covered Providers
	Transaction Sets	<b>Carrier Detail</b>	
<input type="button" value="save"/> <input type="button" value="cancel"/> <input type="button" value="new"/>		<b>The following messages were generated:</b>	
		<b>Message Description</b>	<b>Panel</b>
		Base Information - Save was Successful	Base Information
Base Information			
Carrier Detail			
Carrier	00487 [ Search ]	Carrier Name	SATURN CORPORATION
Sender ID Qualifier - ISA05	ZZ	ID Code Qual - NM108/2100B	XX
Sender ID - ISA06	1	Receiver ID Code - NM109/2100B	1
Receiver ID Qualifier - ISA07	ZZ	Segment Separator	1
Receiver ID - ISA08	1	Element Separator	1
Receiver Code - GS03	1	Component Separator	1
Org Name - NM103/2100A	1	Interactive Eligibility Requests	<input type="radio"/> Yes <input checked="" type="radio"/> No
ID Code Qual - NM108/2100A	XX	Max. Transactions Per File	50
Source ID Code - NM109/2100A	1		

## Summary

In this topic you learned how to add a new carrier with supporting details or modify the details for an existing carrier.

## Adding or Modifying Return Reason Codes

### What

In this topic you learn how to add or modify return reason codes.

### Who

EDI/Help Desk staff members are responsible for performing this task.

### When

You perform this task when there is information missing in the trading partner's profile and the existing return reason codes cannot be applied to the information that is missing.

### Relevance

When there is information missing in the trading partner's profile, the EDI/Help Desk staff member sends a letter to the trading partner. The missing information is specified in the letter with the use of return reason codes. If the appropriate return reason code does not exist or is not sufficient, the EDI/Help Desk staff member can add or modify the return reason codes.

If the appropriate return reason codes are not available or sufficient, the trading partner notification letter will not identify the problem correctly.

### How To

Follow these steps from the MITS home page to add or modify return reason codes:

Step	Action
1	Click <b>EDI</b> .
2	Click <b>related data</b> .
3	Click <b>Return Reason</b> .

Step	Action						
4	Follow the appropriate steps: <table border="1" data-bbox="375 321 1377 722"> <thead> <tr> <th data-bbox="375 321 727 373">TO:</th> <th data-bbox="727 321 1377 373">THEN:</th> </tr> </thead> <tbody> <tr> <td data-bbox="375 373 727 552">Update an existing return reason code</td> <td data-bbox="727 373 1377 552"> <ol style="list-style-type: none"> <li>Click the row for the entry you want to update.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol> </td> </tr> <tr> <td data-bbox="375 552 727 722">Create (add) a new return reason code</td> <td data-bbox="727 552 1377 722"> <ol style="list-style-type: none"> <li>Click <b>add</b>.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol> </td> </tr> </tbody> </table>	TO:	THEN:	Update an existing return reason code	<ol style="list-style-type: none"> <li>Click the row for the entry you want to update.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol>	Create (add) a new return reason code	<ol style="list-style-type: none"> <li>Click <b>add</b>.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol>
TO:	THEN:						
Update an existing return reason code	<ol style="list-style-type: none"> <li>Click the row for the entry you want to update.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol>						
Create (add) a new return reason code	<ol style="list-style-type: none"> <li>Click <b>add</b>.</li> <li>Select the desired option from the <b>Form Type</b> drop-down list.</li> <li>Type the desired explanation in the <b>Reason Text</b> field.</li> </ol>						
5	Click <b>save</b> .						

## Success

You have successfully completed this task when a confirmation message displays.

## Next Steps

Once you have received a confirmation message, verify that you entered your changes or new entry correctly.

## Practice

Add and modify return reason codes using this information:

- Open the **Return Reason** panel
- Click **add**
- **Form Type:** Trading Partner Profile
- **Reason Text:** your name
- **Save** the return reason code
- **Reason Text:** Insert "Practice by: " in front of your name
- **Save** the record

When you complete the practice successfully, verify that your screen is similar to this example:

The screenshot displays the 'Return Reason' management interface. At the top, a message box states: 'The following messages were generated:'

Message Description	Panel	Field	Row
Return Reason - Save was Successful	Return Reason		

Below the message box is a table listing return reason codes:

Key Reason	Form Type	Reason Text
1	Trading Partner Profile	Business Contact Name is required.
2	Trading Partner Profile	Business Contact Phone Number is required.
3	Trading Partner Profile	Business Contact Email Address is required.
4	Trading Partner Profile	Technical Contact Name is required.
5	Trading Partner Profile	Technical Contact Phone Number is required.
6	Trading Partner Profile	Technical Contact Email Address is required.
102	Trading Partner Profile	Practice by: Your Name

The 'Return Reason Data' section for key reason 102 is shown below, with a red box highlighting the form fields:

**Key Reason** 102

**\*Form Type** Trading Partner Profile

**\*Reason Text** Practice by: Your Name

Buttons for 'delete' and 'add' are visible at the bottom right of the data entry area.

## Summary

In this topic you learned how to add or modify return reason codes.

## Searching for an EDI Transaction Record

### What

In this topic you learn how to search for an EDI transaction record.

### Who

EDI/Help Desk staff members are responsible for performing this task.

### When

You perform this task when you have a question from a trading partner about claims.

### Relevance

You perform a search to provide answers for an inquiry from a trading partner.

If your search is unsuccessful, you will **not** be able to provide answers for the inquiry from the trading partner.

### How To

Follow these steps from the MITS home page to search for an EDI transaction record:

Step	Action
1	Click <b>EDI</b> .
2	Click <b>transaction search</b> .
3	Type information or make selections from the drop-down lists to specify the parameters for your search. <b>Note:</b> An entry in the <b>Date From</b> field is required using <b>mm/dd/ccyy</b> format.
4	Click <b>search</b> . <b>Note:</b> You can view the records in row format only and you cannot make changes or deletions.

## Success

You have successfully completed this task when you see the list of records that match your search criteria.

## Practice

Search for EDI transaction records using this information:

- Open the **Transaction Summary Search** panel
- **Trading Partner ID:** 0019252 (Training Trading Partner)
- **Date From:** 01/01/2009
- **Date To:** use the current date
- **Records:** 5

When you complete the practice successfully, verify that your screen is similar to this example:

The screenshot shows the Ohio.gov Medicaid Information Technology System interface. The search criteria are: Trading Partner Name (empty), Trading Partner ID (0019252), Date From (01/01/2009), Date To (TODAY), and Records (5). The search results table shows 5 records for Trading Partner ID 0019252.

Trading Partner ID	ISA Control Nbr	GS Control Nbr	ST Control Nbr	Txn Date	Total	Rejected	Paid	Denied	Suspended
0019252	20100905	5	5	09/05/2010	2	2	0	0	0
0019252	20100904	4	4	09/04/2010	2	2	0	0	0
0019252	20100903	3	3	09/03/2010	2	2	0	0	0
0019252	20100902	2	2	09/02/2010	2	2	0	0	0
0019252	20100901	1	1	09/01/2010	4	4	0	0	0

## Summary

In this topic you learned how to search for an EDI transaction record.

## Searching for File Transmission Details

### What

In this topic you learn how to search for the details about a file transmission.

### Who

EDI/Help Desk staff members are responsible for performing this task.

### When

You perform a search when a trading partner has a question about a transmission.

### Relevance

You perform a search to provide answers for an inquiry from a trading partner.

If your search is unsuccessful, you will **not** be able to provide answers for the inquiry from the trading partner.

### Guidelines

You can specify either trading partner or provider details for your search, but you **cannot** use both.

### How To

Follow these steps from the MITS home page to search for file transmission details:

Step	Action
1	Click <b>EDI</b> .
2	Click <b>file transfer search</b> .
3	Type information or make selections from the drop-down lists to specify the parameters for your search. <b>Notes:</b> An entry in the <b>Start Date</b> field is required using <b>mm/dd/ccyy</b> format. You may enter information for the trading partner or the provider, but not both.
4	Click <b>search</b> .

Step	Action
5	Click the desired row in the <b>Search Results</b> panel to view the record.

## Success

You have successfully completed this task when the details appear for the file transmission record(s) you selected.

## Practice

Search for file transmission details using this information:

- Open the **File Transfer Search** panel
- **Trading Partner ID:** 0019252
- **Start Date:** 09/01/2010
- **End Date:** use the current date
- **Records:** 5
- Select the **last** record in the list of those available

You have completed the practice successfully when your screen is similar to this example:

The screenshot displays the Ohio.gov Medicaid Information Technology System interface. The top navigation bar includes links for Home, Claims, Drug, EDI, Healthcheck, Financial, Managed Care, MAR, Prior Authorization, Provider, Recipient, Reference, RetroDUR, TPL, Security, and Tools. Below the navigation bar, there is a search section with a dropdown menu set to 'File Name' and a search button. The main content area shows 'File Transfer Information' for a specific record, with a red box highlighting the following details:

Transfer Date	9/14/2010 9:17:34 AM	File Size	985
File Name	270.0019252.131127.1138270.245.gz	CRC 32	1428103685
File Path	/export/ftp/acc/dso2/edi/inbound/276/276.0000001.13	File Direction	INBOUND
Originating Server	StateEDIServer	Trading Partner ID	0019252
Trading Partner Name	TRAINING TRADING PARTNER	Provider ID	

Below the file transfer information, there is a section for 'File Transfer' with a dropdown menu set to 'Events'.

## Summary

In this topic you learned how to search for the details about a file transmission.

## Review

### Objectives

In this course, you learned how to:

- Search for a trading partner
- Add a trading partner
- Add or modify information about the relationship between the trading partner and covered provider
- Change contact information for a trading partner record
- Modify trading partner base information
- Set up trading partners with electronic X12 transaction interchange in test and production modes
- Add or modify carrier details
- Add or modify return reason codes
- Search for an Electronic Data Interchange (EDI) transaction record
- Search for file transmission details