1. Introduction

Hello and welcome to the Blue Shield of California 5010 Testing Community. The community site is designed and offered to Blue Shield clients as an effective way to test 5010 HIPAA Transactions and show due diligence in meeting the federally mandated specifications of the Health Insurance Portability and Accountability Act (HIPAA) and the Administrative Simplification Compliance Act (ASCA).

While this service offers a strategic short-term solution, Blue Shield’s 5010 Testing Community provides a long-term investment in communicating with and enabling our submitter relationships.

1.1 About This Guide

The purpose of this User’s Guide is to define the features, functionality that will be accessed by Blue Shield of California Trading Partners. This document serves as the quick reference on how to access/use the testing programs configured in the portal application. This User’s Guide will enable you to login to the Portal, access programs and complete the tasks.

1.2 Getting Started

In order to access BSC’s 5010 Testing Community, please navigate to the following web page address:

https://sites.edifecs.com/?BlueShieldCA and the following screen will appear:
Please enter the user name and password and click “OK”. Note If you forget your username or password, click on the “Recover username” and “Recover password” link given in the login page. User name or a system-generated password will be emailed to the email address listed in the user’s profile.

1.3 User Agreement

Once the user has successfully logged into the BSC 5010 Testing Community the Blue Shield of California User License Agreement box will appear.

**End User License Agreement**

**License Agreement**

Please read the following important information before continuing

Please read the following License Agreement. You must accept the terms of this agreement before continuing with accessing this community.

By accessing or using this website, you expressly acknowledge and agree that:

- your access to, and use of this website, is subject to Blue Shield of California’s [Terms of Use](https://www.blueshieldca.com/bsc/aboutbsc/terms-use/index.jhtml), which are incorporated herein by reference;
- you, and not Blue Shield of California, are fully responsible for determining and maintaining your compliance with all applicable laws, rules and regulations applicable to you, including without limitation the Health Insurance Portability and
2. Home Program (Home Tab)

Once the user has successfully logged into the BSC 5010 Testing Community, the user is defaulted to the “Home” tab for the community. This tab is where welcome messages or community updates and information are kept. The view also provides a quick glance and confirmation that a specific user of a specific submitter is signed on to the site.

Following options are available under ‘Home’ page:

a) Start - Clicking this option will take you back to the default welcome screen on the ‘Home’ program
b) Reference Material - The “Reference material” option found on the “Home” tab is where information is kept that pertains to the community as a whole. For example, an FAQ on how to change a user’s password, or this user’s guide in how to use the Community is listed above. The reference material listed on the Welcome page is different from that found in a program. Information posted within a program is specific to that particular task
c) About Edifecs - This link will take the user to the Edifecs’ home web site.
d) About Blue Shield - This link will take you to Blue Shield’s home web site.

Edit/View Organization Profile: The organization profile includes key contact information, identifiers, and other information for use by other submitters. Click ‘Manage’ button on top right side to edit the profile details.

Edit User Account: The information housed here is data that pertains to a specific user account. This information can be the same or different from the Submitter Organization that the user is a member of. This is also where a user can modify their password. Click’ Manage’ button to top right side to edit the user accounts.
3. Programs Tab

This tab navigates the user to the list of programs that they are currently enrolled. A program and its subset of tasks, is the business objective that is to be completed by a user. Progress of programs completion will be monitored by Community.

Note: Using the above graphic as an example, the user would click on the programs. In doing so, the Program’s Welcome page will appear and give a brief description of what the business objective to be completed entails.
Example: Once the user clicks on the Program 5010 A1-837 Professional link, the following page becomes visible:

The architecture of the community remains the same down through each level. The bar on the far left side of the screen is another navigation bar with options visible, and contains information that apply only to the 5010 A1 837 Professional link program.

**Start** - By clicking “Start Here”, the user will always be brought back to the main page of the program.

**Inbox** - By clicking “Inbox”, the user will be directed to a page that lists all notifications (emails sent to a user by the Community). Notifications can consist of community and program status, as well as direct communications specific only to an organization.

**Issues** - By clicking “Issues”, the user will be directed to a page that lists all public issues for this specific program.

**Reference Material** - By clicking “Reference Material”, the user will be directed to specific documentation. This information is posed to assist the user in completing tasks within this specific program.
3.1 List of Tasks in a Program

By clicking the program link, the user will be taken to the list of tasks that are listed for this specific program.

**Task Name** – This field is a short description that outlines the basic requirement to be accomplished.

**Task Required** - “Required” designates whether or not the task listed is a requirement of completing the program. If a task has “Yes” as required, then it must be completed. If the task has “No” listed, then the task is optional and will not keep the user from completing the program.

**Task Status Message** - The “Status Message” denotes the status of completion of a specific task.

**FLOW OF TASKS**

- **TP - Optional**
  - Review 5010 837P Reference Documents
  - Review 5010 837P Online Guideline

- **TP - Optional**
  - Test 5010—837P File

- **TP - Required**
  - Test Passed

- **TP - Required**
  - Request Community for Back end system testing

- **TP - Required**
  - Closeout Survey Questionnaire

- **TP - Required**
  - Community Approval for Production

  Automated notification to Community

  Community - Required
  TP - Read Only
3.2 How to Test the Data file:

From the list of tasks, please click your assigned link (example: 5010 A1  837 Professional link.) The following screen will appear:

To validate a test file, click on Choice 3 of Field 1 “Run Test”, and follow the testing the wizard. There will be four steps to complete:

1. This wizard will assist the user in uploading a data file to be tested against a guideline. After uploading, the CommerceDesk validation engine will verify the compliance of the data file and create a detailed compliance report.

2. Upload a data file for testing - Select the data file to be uploaded and tested. The data file will be uploaded when the user clicks the “Next” button. This may take several minutes depending on the file size.

3. Clean up data file – This option allows the user to remote extra characters from their file. For testing purposes, please just click “Next” without changing any option.

4. Complete the Validation Wizard – This screen provides a summary of what is being tested, and projects approximately how long it will take to validate the file.

Once the file has been analyzed, the results of the LAST test will be visible under Field 2 – Test Results.
Field 3 – Test History will also update with an entry that allows the user to navigate to the error report for the file in question.

3.3 View Validation Test Results:

To view the results of previously submitted data files, click on a link listed under Field 3 – Test History.
This view allows for the user to choose the error report that best fits their needs. Reports can be printed, or saved to disk in order to fax, mail or email to the Vendor in question that will assist in solving errors.

There are 5 views available:

Split View – This view is the most dynamic of the five. It visibly shows the data file, and links the error within the data, to the error code, and then to the Implementation Guide itself.
Errors View – This view only gives the semantically listing of the error.
Data View – This view provides a wrapped view of the data file used for validation.
Guide View – This view the Implementation Guide Only.
Report View – This view breaks down the report by error, data, and Implementation guide. This view is the best and most suggested view to save and print off for exchange.

4. Reporting Issues

The “Issues” functionality on the “Home” Tab or each “program” tab is a very important aspect for a user when seeking clarifications or resolutions from in regards to the community perspective.

There are two places in which an issue can be submitted. The structure follows the same layout as the “reference material”. For example, a user could post a question concerning the discussion in regards to hearing about a new standard being mandated under HIPAA vs. posting an issue that pertains to a specific program found under the “My Programs” Tab.

Example:

How to submit an Issue: Please click on “Issue” on the left side bar. The following Screen will show:

From this screen, please click “Add New”. The “Open Issue” wizard will show:
Field 1 is the Subject name of the Issue that the user is filing. Please try to make this header descriptive of what the issue, question, or feedback is about.

Field 2 is where the user can assign certain characteristics to the issue that is being filed.

a. Status – Denotes the current standing of the issue. There are 5 statuses:
   I. Open Community Owner – The issue is open and pending response from Community.
   II. Open Partner – The issue is open and pending response from the Submitter.
   III. Closed Pending Community Owner Confirmation – The issue is closed and awaiting signoff from Community. For example, the Submitter figured out the issue themselves, or found resolution elsewhere. They posted the response and closed the issue and are informing of the action.
IV. Closed Pending Partner Confirmation – The issue is closed and awaiting signoff from the Submitter. For example, community answered the issue and is waiting for the Submitter to acknowledge and or accept the response.

V. Closed – Final resolution or response.

Some Issues will go through multiple status changes. All change history is tracked within the original status.

b. Severity denotes the importance of the issue to the user. There are 5 levels of Severity:
   I. Critical.
   II. Serious.
   III. Important (Default Value).
   IV. Routine.
   V. Defer.

c. Categories denote the community breakdown of what an Issue relates to. For example, if there is a “Suggestion” category, and the user was submitting a “Suggestion”, that option would be chosen. Please note that these categories are customizable by Community.

Once the user has filled in all Fields, please scroll to the top and click “Save and Close”. The view will change back to the “Program Issues” view, and the issue just submitted will appear. All issues submitted both at the Home and My Program Tab remain in the “Issues” link and will not disappear.

4.1 How to get ONLINE Ramp Manager Help:

   a) Click ‘Help’ button on right top corner side to access documents from online RM repository.

   b) To get help on the current screen, click button.

   c) Send email to EDI_BSC@blueshieldca.com
5. Appendix A – Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>Individuals who will eventually be responsible for ongoing maintenance of the Ramp Management community and who will be the owner of issue tracking.</td>
</tr>
<tr>
<td>Administrator</td>
<td>Trading Partners who are invited to participate in the community by the community owner.</td>
</tr>
<tr>
<td>Public Programs</td>
<td>Public programs are open to all partners in the community.</td>
</tr>
<tr>
<td>Private Programs</td>
<td>Private programs are available only to partners who have been enrolled by a community owner administrator or manager</td>
</tr>
<tr>
<td>Tasks</td>
<td>Tasks define the steps that partners must perform to complete a program.</td>
</tr>
<tr>
<td>To Do Task</td>
<td>A general task that can include any custom steps defined by the program administrator</td>
</tr>
<tr>
<td>Reference Material</td>
<td>Reference material, such as documents, guidelines, and other content can be made available in a program. Partners can access reference material in Ramp Management, eliminating the need for hub organizations to send files to all partners individually.</td>
</tr>
<tr>
<td>Validation Task</td>
<td>Validation tasks are used to validate an uploaded partner data file for compliance with a guideline.</td>
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</tbody>
</table>