

## **CORE Users – Quick Start Guide (Phase III)**

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CAQH Committee on Operating Rules for  
Information Exchange (CORE)

### **User Quick Start Guide**

for the

Edifecs CORE Certification Phase III Testing  
System



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### **INTRODUCTION**

This Guide is to be used in connection with Edifecs CORE Phase III Certification Testing System. It is meant to serve as an instruction document for the design and general utility of this system and is not a step-by-step CORE certification guide.

The Phase III Certification System is used by entities seeking voluntary CORE certification on the CORE EFT & ERA Operating Rules.

### **Section I – CORE Self-Registration Walkthrough**

Prior to beginning certification testing with the Edifecs CORE Certification Phase III Testing System, a CORE Stakeholder should:

1. Visit the CAQH CORE website at [http://www.caqh.org/CORE\\_overview.php](http://www.caqh.org/CORE_overview.php)
2. Review the CORE Rules, Pledge, HIPAA Attestation Form, and the Seal Application.
3. Become familiar with the CORE Certification Step-By-Step Process available at: [http://www.caqh.org/CORE\\_step\\_by\\_step.php](http://www.caqh.org/CORE_step_by_step.php).
4. Sign and Submit the CORE Pledge. Completing this step is not required in order to begin testing, but is required in order to receive certification. See the subsection entitled, “CORE Pledge Date, What and How?” for more information on the Pledge.
5. Discover the local network resources that will assist in the testing including IT people to help with the communications. For more information see the section entitled, Section III. “Where do I go for Connectivity Information?”

Once you have completed the above five steps you will be ready to embark on the Edifecs CORE Certification Testing. Edifecs is providing the certification testing services free of charge to CORE stakeholders, because we support the initiative of CORE, and because we believe in offering CORE stakeholders the best testing service at the cheapest price.

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### **Subsection I.a – Where do I begin?**

If you have navigated to the Edifecs Login page at <http://www.edifecs.com/core-phase-iii> select “Edifecs Compliance Online for Healthcare” from the “Customer Community” drop-down. Click on CORE Phase III and you will notice the “Members Log In” section where members can login to access the Phase III certification system.

Please select the appropriate program from the drop down menu and click on the **register** button.

This selection will open the Account Registration Wizard. From the wizard’s first page, you will click on the [Next] button to continue to move through the wizard. Clicking on the check box next to the text, “I have read the agreement and agree to its terms”, will enable the [Next] button, which can be clicked to move on to the next wizard screen.

### **Subsection I.b – Contact vs. Organization what does it mean?**

The next wizard screen is the contact information. This is your user information. Here you will create the username and password that you will use to access the CORE certification testing for your company. This will make you the administrative user for your organization, and other contacts and users can be added if you are going to have more than one person performing the certification testing. If you need to add additional users to your organization’s profile, please visit the section entitled, “What if there is more than one of us testing?”

The image on the next page is the actual Contact/User registration screen you will encounter during the CORE self-registration. The required fields are highlighted with a red asterisk (\*). The name elements, first and last are the name of the user, or your own given name. The email address is where you want the notifications and account approval sent to. Please use an address that you check often and ensure that e-mails from [support@edifecs.com](mailto:support@edifecs.com) are not blocked by your systems security filters.

The username and password fields are where you will assign your own username and password. The password must be at least eight characters in length. (**Note:** Edifecs staff will not have access to your password, so please make sure to use a password that you can remember.)

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### Account Registration Wizard

#### Create User Identification Name and Password

Register your account and contact information. The \* denotes a required field.

**Name, Title and Email**

First Name: \*  M.I.  Last Name: \*

Title:

Email Address: \*

Confirm Email Address: \*

Preferred Email Type:

**Phone and Fax**

Business Phone:  Ext.:

Cell Phone:

Home Phone:

Business Fax:

**Business Address**

Address Line 1:

Address Line 2:

City:  State:

Zip:  Country:

**User Name, Password & Security Question**

User Name: \*

Password: \*  Confirm Password: \*

Choose a password that is at least eight(8) characters long.

Security Question:

Your Answer:

If you forget your password you'll need to confirm this information. To protect your account, make sure "Your Answer" is memorable for you but hard for others to guess!

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The next wizard screen, shown on page 8, is the organization for which you are doing the CORE certification testing. This is the actual entity that has signed or will sign the CORE Pledge, and for which the seal application will be submitted.

The required fields on this screen are the Organization Name, CORE Stakeholder Type, and Batch Support information. The Organization Name should be the full legal name of the company seeking the CORE seal.

### **Subsection I.c – Which CORE Stakeholder am I?**

Although there are only five stakeholder-specific (i.e., clearinghouse, endorser, health plan, provider, vendor) CORE certification seals that can be received, there are seven CORE Stakeholder types listed to choose from. This is because entities such as clearinghouses are listed up to three times so that they can properly identify which type of clearinghouse they are. The following is a brief description of all the stakeholder types to assist in selecting the appropriate type for your organization. (**Note:** The programs you are assigned to test under, by Edifecs, are reflective of your stakeholder choice.)

- **Provider** – Providers are those physicians, physician groups, and hospitals that receive payment and/or remittance information from the health insurer for claims.
- **Provider Vendor** – A Vendor is an organization that provides practice management information systems to providers, hospitals or other patient care professionals. A vendor may be performing the testing in order to certify their own information systems for these various capabilities. The Provider Vendor receives payment and/or remittance information from the health insurer for claims.
- **Health Plan** – A Health Plan is a payer organization with members who are serviced by the provider community. Health Plans submit payment and/or remittance, usually in the form of the HIPAA 835 transaction.
- **Clearinghouse** – A Clearinghouse can serve several roles in the eligibility process, and they are given three options here as a CORE Stakeholder to identify which services they perform.
  - **Clearinghouse (submit request only)** – There are clearinghouses which offer Providers a way to request payment information. These clearinghouses submit the request on behalf of the provider. They do not hold any payment/remittance information of their own, and so only perform the request, asking for payment and/or remittance from the Health Plans.

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- **Clearinghouse (receive request only)** – Other clearinghouses act as front ends for Health Plans and receive the request for payment and/or remittance from the providers. They don't contract with the providers directly, but hold the payment and/or remittance information from Health Plans, or provide Health Plans with access to receive the payment and/or remittance requests and fashion the response to the providers.
- **Clearinghouse (submit and receive)** – Other clearinghouses operate in both directions. This means that they do not hold the payment and/or remittance information, but rather operate as a gateway between the providers and health plans, or that they hold information from some provider groups as well as some health plans. These entities will process and either create, or distribute the request and response transactions. Most clearinghouses will fall under this umbrella.-
- **CORE Endorser** – This option has been left in place for the Edifecs CORE Certification Testing System, although there are no programs or tasks associated with the CORE Endorser option. Selecting this option will not give the user access to any of the testing programs, but will provide access to the internal CORE Welcome page, where additional information can be found.

### **Subsection 1.d – What is Batch?**

The CORE Phase III rules are applicable to Batch only. In Batch, most requests will be returned by 7AM the following day.

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**Account Registration Wizard**

**Enter Organization Information**  
Please fill out the form below; the \* denotes a required field.

**Name and Identifiers**  
Name: \*

**Phone, URL, and Email**  

 Primary Phone:  Extension:   
 Primary Fax:   
 Email Address:   
 Home Page:   
 Commerce Page:

**Billing Address**  
 Billing Address Line 1:   
 Billing Address Line 2:   
 City:  State/Region:   
 Zip/Postal Code:  Country:

**Shipping Address**  
 Shipping Address Line 1:   
 Shipping Address Line 2:   
 City:  State/Region:   
 Zip/Postal Code:  Country:

**Additional Information**  
 CORE Stakeholder Type: \*  -- None --  
 Provider (Submit Generic Batch Retrieval Request for v5010 835 - Information Requestor)  
 Provider Vendor (Submit Generic Batch Retrieval Request for v5010 835 - Information Requestor)  
 Health Plan (Receive Generic Batch Retrieval Request for v5010 835 - Information Source)  
 Clearinghouse (Submit Generic Batch Retrieval Request for v5010 835 - Information Requestor)  
 Clearinghouse (Receive Generic Batch Retrieval Request for v5010 835 - Information Source)  
 Clearinghouse (Submit & Receive Generic Batch Retrieval Request for v5010 835 - Both)  
 CORE Pledge Date:

**Identifiers**  

<b>Identifier</b>	<b>Production Value</b>	<b>Test Value</b>
SSN: <input type="text"/>	<input type="text"/>	<input type="text" value="Same as production"/>



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### Subsection 1.e – CORE Pledge Date, What and How?

The CORE Pledge Date is available for population on the Organization profile. This is an optional field, because CORE stakeholders can begin testing with the Edifecs CORE Certification Testing System without having submitted the CORE Pledge. However, a complete CORE Seal Application includes a signed Pledge and in order to complete the testing system, you will have to provide the date a CORE Pledge was signed and submitted to CAQH.

The CORE Pledge is important as it documents that your company supports the CORE initiative and will be compliant with the CORE rules. This Pledge Date is also important as it begins a 180-day window in which you must complete the CORE certification testing. Be aware that if your Pledge 180 days have expired when you submit your Seal Application a new Pledge will be required to complete the application. You will not need to retest with the Edifecs CORE Certification Testing System.

There are two methods for adding the CORE Pledge Date to your Organization profile. Method One is during the self-registration process. Method Two is to edit your organization profile at a later time to add the date.

**METHOD ONE:** To Add the CORE Pledge Date on the Organization Profile

1. Press the question mark next to the CORE Pledge Date text field.



CORE Pledge Date:  ?

2. This will open up a calendar control where the date that you signed the CORE Pledge can be selected. The month and year can be changed by selecting the less than "<" and greater than ">" next to the displayed month or year. When the appropriate month and year are displayed, click the day that you signed and submitted the CORE Pledge. The calendar closes and the CORE Pledge Date displays the selected date.



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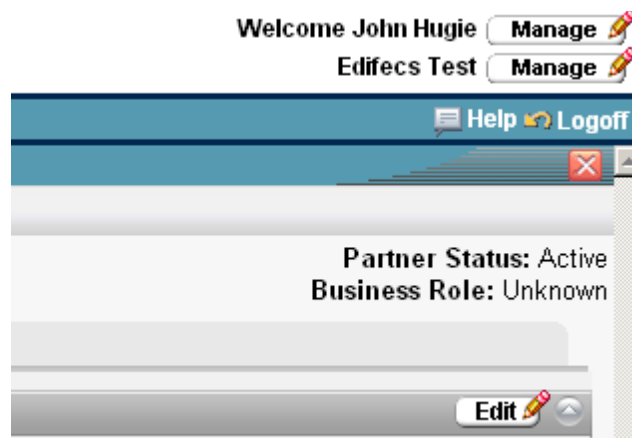
**METHOD TWO:** To edit your Organization Profile and add or update the CORE Pledge Date

If you are the administrator for your organization, you can edit the Organization profile at any time to add or change the CORE Pledge Date.

1. Click the **[Manage]** button next to your organization name on the top right of the screen as shown below. This will take you to the Organization Information page which displays some of the information you provided during self-registration.



2. Click the **[Edit]** button on the bottom right of the screen as shown below. This will take you to the same Organization profile shown on page 8. In this screen you can edit the CORE Pledge Date using the three steps illustrated above. Pressing **[Save and Close]** at the bottom of the information will save your CORE Pledge Date to your profile. You can verify that it's been saved by reviewing the information on the Organization Information screen.



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### **Subsection I.f – Self-Registration Final Steps**

After completing the Organization Profile and selecting the **[Next]** button you will be taken to the Word Verification screen. The system wants to verify that you are an individual filling out the information rather than some computer system designed to automate registration. It will ask you to verify a word that it will display. The word to be verified will be case sensitive.

Select **[Next]** and **[Finish]** to complete the wizard. This will return you to the login screen and inform you that your account has been created. You will receive an email which will welcome you to the Edifecs CORE Certification Testing System, and that your account is ready, **pending approval**. In order to make certain that all CORE Stakeholders are given access to the appropriate testing programs, Edifecs Support will be approving all of the account registrations before you will be able to sign in to the system.

### **Subsection 1.g – From Account Approval to Testing**

Account set up and approval is the last phase of Self-Registration. There will be a period of time between when registration is completed and an account is approved and ready for testing. It is expected that Edifecs Support will respond to self-registration requests with-in **three** business hours of a business day.

Edifecs defines the business day as 9AM to 5PM Pacific Time. Edifecs Support is available from 5AM to 5PM Pacific, so the approval of an account may take place before the 9AM Pacific Time deadline. You will receive an email notification after your registration is approved.

Edifecs Support will enroll the user into the requested testing programs, and approve their account as quickly as possible to allow users to have access to the testing system. (**Note:** You will NOT be able to immediately create an account and login. You will have to wait for the approval email to arrive, before logging into the system.)

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### Section II – CORE Certification Testing, the Process

Once logged in to the Edifecs CORE Phase III Certification Testing System you will be able to access the various testing programs and tasks associated with demonstrating implementation of all applicable CORE rules. The programs have been designed to work in the numerical order of the CORE rules and satisfy all of the CORE test scripts.

If registered, you can login by going to the “Home” page at <http://www.edifecs.com>. Select “Edifecs Compliance Online for Healthcare” from the “Customer Community” drop down. Click on CORE Phase III and enter the username and password to login.

Upon logging in, you will be taken to the Edifecs CORE “Welcome” page. The Welcome page contains information on how to complete the certification testing process as well as links to the CAQH pages relative to the CORE rules.

The tab bar across the top gives you options for navigation. Click the **Home** tab to open the Welcome Page – the page you are currently viewing at the time of login. Click the **Programs** tab to view the list of CORE certification testing programs in which you have been enrolled. Click the **CORE Certification Help** tab for documentation regarding CORE certification.

There are two programs in which you might be enrolled depending upon your stakeholder type. More than one program may apply to your organization. The programs are as follows:

- **Information Requestor Batch Testing.** This program is for Providers, Vendors and Clearinghouses that need to submit a 'Generic Batch Retrieval Request' to a clearinghouse or health plan and receive an 835 back. The batch program tests your system's ability to respond to an 835 with the appropriate acknowledgement.
- **Information Source Batch Testing.** This program is for Health Plans and Clearinghouses who respond to the 'Generic Batch Retrieval Request' with an 835. This program also has additional tasks related to EFT and ERA enrollment.

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### **Subsection II.a – Accessing the Programs and Tasks**

Accessing the individual programs and tasks is as simple as clicking on the listed links. On the Programs tab, access a program by clicking its name in your program list. This will open a list of tasks that need to be completed in order to perform the certification testing for that particular program. (**Note:** If you are registered for a single program, then your CORE certification testing is complete at the time you complete all of the tasks in the program. If you are registered for more than one program, you will only complete the certification testing when you have completed all the tasks in all the programs in which you are enrolled.)

When you access a program it will bring you to a Program “home” page which will provide more information about the specific program, as well as provide a button at the bottom of the screen to click in order to access the tasks. This home page will also give you more information on how to use each of the buttons on the left side of the screen to interact with the various components of the programs.

To work on the programs select the **[Click to Test]** button, and then start with the first task on the list and work down. The tasks are designed to be accomplished in order, but if you find that some tasks can be readily completed and others require assistance be aware that some tasks may be completed out of order.

(**Tip:** The columns on the screen are expandable. For instance, if you can't see the entire task name, click and drag the top column, like you would in Excel and widen the column so that you can see the entire task or program name.)

### **Subsection II.b – How do I complete certain task types?**

All of the tasks are structured similarly. The task name is descriptive of what the task is trying to accomplish. The CORE rule and test script to which the task applies is included in parentheses after the task name. Although there are several different tasks in each program, most can be grouped into a few task types. The major task types are uploading, connectivity and other tasks.

Although named differently and requiring different information, if you understand how the basic task type is to be completed, then the task directions should be sufficient to help you complete the task.

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### **Subsection II.b.i – Upload Tasks**

Upload tasks ask that you attach a file to complete a CORE rule test. A prime example of this is the Phase III Rule 350 Companion Guide. This task asks you to upload a sample page of your 835 companion guide. For example, this means that you take a page of your companion guide, create either a .tif or .pdf screen image of the guide and attach it to the task. Once attached to the task you will mark this and the other Upload type tasks as “**Partner Steps Complete**”. This will put the task in a “Pending” status to be reviewed by Edifecs Support. Please see subsection C entitled “Task Validation, What is it” for more information on what a pending task means. Once the task has been validated Edifecs Support will either mark the task as “Complete” or “Not Started”. If they mark the task as “Not Started”, they will put notes in the task to identify what was wrong or incomplete with the task.

### **Subsection II.b.ii – Connectivity Tasks**

There are a number of tasks which will ask you to communicate with the system using the CORE Phase II CORE 270 Connectivity Rule Version 2.2.0 method. Please see the Section III entitled “Where do I go for Connectivity information” for more information related to CORE Phase III Connectivity requirements. These tasks will give you URL and other information necessary to submit or receive files and expect that you respond to the information you received. Read the task instructions carefully as they will provide you with detailed information on how to complete the task. Edifecs will not perform the tasks for you. These tasks are auto validated, which means that once the task is complete it will either report as “Completed” or “Failed”

### **Subsection II.b.iii – Other Type Tasks**

There are other tasks which require you to confirm that you have signed the CORE Pledge, downloaded the CORE Rules, Test Scripts and generally respond to questions. These tasks are most easily completed by thoroughly reading the task instructions and following them. There are a limited number of these types of tasks, and all of them provide great detail in how to complete them.

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### **Subsection II.c – Task Validation. What is it?**

Tasks that go into a “**Pending**” status or tasks where you mark “**Partner Steps Complete**” are tasks which require an Edifecs review of the information that you have uploaded. This happens with every Upload type task, as well as some of the other type tasks. Once you have uploaded the information Edifecs Support will review the log files, screen shots, and other information that you have uploaded to the tasks. Edifecs Support due to the volume of uploaded tasks may take up to 24 hours to validate a screen shot, log file or other uploaded information. This usually means that you should have a “Completed” or “Not Started” task status, by the same time the following business day.

Edifecs Support will put notes into the task in the case that there was an error which needs to be corrected before resubmission. Notes can be found at the bottom of the task screen, near the [**Save and Close**] button. You can view the notes by clicking on the link.

### **Subsection II.d – What if I have questions?**

Any questions that you have related to the Edifecs CORE Certification Testing System can be addressed via several methods. We recommend that you first select the [**FAQs**] button on the left hand side of the screen. This will take you to the most Frequently Asked Questions, and will hopefully be a primary resource for answering the questions you might have.

You may also submit an issue to the Edifecs support staff. Selecting the [**Add Issue**] button under [**Edifecs Support**] on left navigation bar, and then [**Add New**] at the top of the screen will take you to a form where you can enter your question and any additional information that you may feel is relevant to your concern. The [**Add Issue**] button is also located at the top of the screen in some instances (e.g., when an individual task is open). An issue will be submitted/logged by selecting the **Save** or **Save and Close** button located at the top or bottom of the Open an Issue question form.

If no response is received to a logged issue by the end of the next business day, send an e-mail to [support@edifecs.com](mailto:support@edifecs.com) or call Edifecs Support at 425-452-0630 ext 0623.

The Open an Issue question form which the [**Add Issue**] button opens is shown on the next page:



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**Open an Issue**

Save and Close Save Cancel

**Open an Issue**  
 Send feedback, request information, or submit a problem.  
 To submit the issue to Edifecs Support please use the "Save" or "Save and Close" option at the top.

Issue #: ----

---

**1 Subject** (Short description of the issue)

**2 Assign, Update Status, and Categorize**

Assigned Partner:  Search

Program List:  ▼

Status:  ▼

Severity:  ▼

Categories: There aren't any categories available

**Prioritize, Target, and Resolve** (Program Owner Only)

Priority:  ▼ Estimated Hrs:  Actual Hrs:

Assigned To:  ▼

Target Date:  ▼  ▼  ▼

Resolution:  ▼

**3 Initial Issue Summary** (Detailed description of the issue. Use "Notes" for entering ongoing comments.)

**4 Attach Supporting Files** (Attachments are uploaded on "Save")

File Name	Authorization	Created	Size	Delete
<p><b>+ Add New Attachment</b></p> <p>Step 1: Select File Browse to the local file on your system for uploading: <input type="text"/> <span>Browse...</span></p> <p>Step 2: Authorization Public Attachments are visible to partners: <input type="text" value="Private"/> <span>▼</span></p> <p>Step 3: Add Note (Optional) Add a short note about this file: <input type="text"/></p> <p>Step 4: Attach File After clicking attach, please wait for the file to upload and the screen to refresh.</p> <p style="text-align: right;"><span>Attach File</span></p>				



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The **Subject** of the question is the base question in limited words. More explanation can be used in the **Issue Summary** section. You can change the severity of the issue, although we recommend leaving the severity as it is, unless there is a major issue that requires as quick a review by Edifecs Support.

If you have any attachments, such as screen shots etc to add to further explain the issue or question, attach the file using the **[Attach File]** button. Once an issue or question has been posted, Edifecs Support will be notified and you will receive an email when your issue has been addressed or modified.

### **Subsection II.e – How do I get a hold of Edifecs Support**

If there are questions or issues which need to be addressed by Edifecs Support directly, please contact Edifecs Support at [support@edifecs.com](mailto:support@edifecs.com). Someone will be available from 8AM to 8PM Eastern Time, and they will address emails as quickly as possible. When possible we ask CORE stakeholders to review the FAQs and Question/Issue submission forms first, to keep Support operating in a smooth and efficient manner.

Questions related to logging into the system, or self-registration should be directed to Edifecs Support at the above listed email.

### **Section III – Where do I go for Connectivity information?**

A CORE Testing entity must be able to support the Phase II CORE 270 Connectivity Rule Version 2.2.0.

The CORE Phase II Connectivity requirements are available at –  
<http://www.caqh.org/pdf/CLEAN5010/270-v5010.pdf>.

Please contact your IT team and/or Network administrators for information related to your specific CORE connectivity implementation. (**Note:** Edifecs will not perform the connectivity tasks on behalf of CORE stakeholders. Edifecs operates as a client or server as necessary to test CORE stakeholders, but does not have educational information or resources to answer questions about your connectivity implementation. If a Health Plan or Clearinghouse is having difficulty with the CORE connectivity response tasks using the server setup, those questions should be addressed to Edifecs Support via the Issue/Question form or via email to [support@edifecs.com](mailto:support@edifecs.com)).

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### Section IV – What if more than one of us is testing?

There might be the occasion where more than one user at an organization will want to conduct the CORE certification testing. In this case, one user will self-register using the steps described in Section I above. Following their registration approval, that user acts as organization administrator and can then add other users to the system. These additional users can also perform CORE certification tasks on behalf of that organization.

To add more users to your organizations profile:

1. Click the second **[Manage]** button on the top right of the screen as shown below:



2. Clicking the **[Manage]** button takes you to the Organization Information page, which lists some of the information you provided at self-registration. There will be a tab list across the top of the screen which will take you to other pieces of information specific to your organization. Click the **[Contacts]** tab. The Contacts tab contains the list of contacts (users) that have been added to your organization.



3. There is an **[Add]** button on the right. Click this button to open the Add Contact Wizard, which will allow you to add more users to your organization's profile.

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4. In the wizard the first two screens can be passed through by pressing **[Next]**. The third screen will look very similar to the one shown on page 5, and have the same required fields of First Name, Last Name, and Email Address. The fourth screen gives you the option of assigning a user name and password. Press **[Next]** to navigate through the screens.
5. You will be taken to a **Send Invitation** screen, which will send out an email to the contact (user) that you have added to let them know that they have access to the system. This email can be skipped, by unselecting the **Send Invitation** check box, shown at the top of the screen.
6. Press **[Next]** and **[Finish]** to complete the addition of a contact (user) for your organization. This process can be repeated as many times as necessary depending on how many people will be performing the CORE testing for your organization.