



Quick Start Guide - Health Share of Oregon
HEALTH CARE ELIGIBILITY BENEFIT INQUIRY AND RESPONSE
(270/271 - 005010X279A1)

PH TECH

Version: 3.0

I. Introduction

PH TECH currently supports access to certain data by 3rd party applications and clients. This allows for integration between PH TECH systems and non-PH TECH systems. Users of this interface are responsible for the data and its usage once it is extracted from PH TECH. This includes security mechanisms around the transit and storage of this data in other locations.

Purpose of the Companion Guide

The purpose of this companion guide is to clarify specific data content requirements to be used in conjunction with the TR3 standard for 005010X279A1.

II. Connectivity

Transport and Operations

The 270/271 is accessible via a web service interface accessible over the Secure Hypertext Transfer Protocol (HTTPS). The endpoint and its associated operations are exposed via the Web Service Definition Language (WSDL).

Endpoint Production: <https://cim6.phtech.com/Cim/Services/EligibilityService.asmx>

Endpoint Testing: <https://cim6.dev.phtech.com/CIM/Services/eligibilityservice.asmx>

The exposed operations follow the CAQH Core II web service operations for Real Time Transactions. Other operations are currently unsupported.

Submitter Setup Requirements

In order to proceed with preparations for connectivity, PH TECH requires the following information from the submitter:

1. Verification of Business Associate Agreement/Trading Partner Agreement. If none exists PH TECH will work with the submitter to have an agreement executed.
2. Contact name
Address
Phone Number
Email Address
3. IP Address Range. Please provide the IP address range that the 270 requests will be initiated from.
IP Address Range: _____._____._____._____.
4. Example: 10.0.44

Web Service Access

In order to access the 270/271 service you will need an API key. In order to obtain an API key please contact PH TECH EDI Support at 503-584-2169 option 1. API keys are associated with an individual user account within PH TECH CIM product. Data access is controlled using the same mechanisms as security configurations for standard CIM user accounts. Also, data changes in CIM are tracked to that user account for auditing/change tracking purposes.

Along with using an API key, the interface requires clients to connect from a predefined IP range. This prevents compromised API keys from being used outside of the desired organization. The IP range is configured for a practice office in CIM and will apply to all users within the office.

Setting up API access

To configure API access, the following steps are required:

1) Determine if a new user account is needed or if the API access should be tied to an existing CIM user account. If an existing user account is used, skip to Step 2. If a new user account is needed, log into CIM and fill out the "Register User" link from the Main Menu to create a new user account in the system. Once created, this account will require activation.

2) Contact the PH TECH EDI Support (503-584-2169 option 1 or edi.support@phtech.com). The EDI Support Specialist will be able to complete the process. Please be prepared with the user account you wish to add API access to as well as the IP address range you wish to use for your office.

If at any time, you believe your API key may have been compromised, please contact the PH TECH Service Desk immediately. For extra security precautions, PH TECH recommends that organizations consider periodically cycling their API key.

Using the API Key & Example SOAP Request:

When making a request to an operation every request will need to have the API key provided in the header of the request. The element name will be "PH TECH-api-key".

```
POST https://localhost/Cim/Services/EligibilityService.asmx HTTP/1.1
Content-Type: text/xml; charset=utf-8
phtech-api-key: 00000000000000000000000000000000
SOAPAction: "RealTimeTransaction"
Host: seteam2
Content-Length: 618
Expect: 100-continue
Accept-Encoding: gzip, deflate
Connection: Keep-Alive

<s:Envelope xmlns:s="http://schemas.xmlsoap.org/soap/envelope/">
  <s:Body xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns:xsd="http://www.w3.org/2001/XMLSchema">
    <COREEnvelopeRealTimeRequest
  xmlns="http://www.caqh.org/SOAP/WSDL/CORERule2.2.0.xsd">
      <PayloadType xmlns="">X12_270_Request_005010X279A1</PayloadType>
      <PayloadID xmlns="">f81d4fae-7dec-11d0-a765-00a0c91e6bf6</PayloadID>
      <TimeStamp xmlns="">4/26/2013 2:00:22 PM</TimeStamp>
      <SenderID xmlns="">SOME_SENDER_ID</SenderID>
      <ReceiverID xmlns="">PH TECH</ReceiverID>
      <CORERuleVersion xmlns="">2.2.0</CORERuleVersion>
    </COREEnvelopeRealTimeRequest>
  </s:Body>
</s:Envelope>
```

Our system uses the **phtech-api-key** in the http header for identifying the sender for authentication & authorization purposes. If the **phtech-api-key** is not provided, is invalid, or if a request is made outside of the allowed IP address range, the request will be responded to with an HTTP 403 error.

The **SenderID** value submitted in the 270 SOAP request will simply be echoed back in the 271 SOAP response as the ReceiverID, and has no impact on the data returned in the 271.

Test Client

A sample test client (C#/.NET 4) is available upon request which will allow one to quickly verify connectivity to our system and perform a real time eligibility lookup via a 270. The test client provides an example of how to add the custom http header for the api key as well as encode the payload properly so as to conform with the CORE standards.

Test Member Eligibility

Here are some test members for you to use in your 270 request. Please do not submit eligibility requests with other member data. YOU MUST USE THE TEST MEMBER DATA BELOW.

last_name	first_name	dob	eligibility_ud	eff_date	term_date	carrier
User	Test 1	6/6/1975	FC123456	2/5/16 0:00	Null	HS_OR_Multnomah
User	Test 1	6/6/1975	FC123456	6/1/17 0:00		HS_OR_PROVIDENCE
USER	Test	1/1/2001	HS123456	1/1/16 0:00	Null	HS_OR_CAREOREGON
USER	Test	1/1/2001	HS123456	8/1/12 0:00	12/31/12 0:00	HS_OR_CAREOREGON
USER	Test	1/1/2001	HS123456	1/1/13 0:00	6/30/17 0:00	HS_OR_CLACKAMAS
USER	Test	1/1/2001	HS123456	1/1/13 0:00	6/30/17 0:00	HS_OR_KAISER
User	Test 6	7/4/2004	HS4567	1/16/13 0:00	Null	HS_OR_CLACKAMAS
User	Test 6	7/4/2004	HS4567	1/16/13 0:00	Null	HS_OR_KAISER
User	Test 9	2/13/1957	HS5678	5/10/17 0:00	Null	HS_OR_TUALITY
User	Test 9	2/13/1957	HS5678	4/15/17 0:00	Null	HS_OR_WASHINGTON
User	Test 4	10/31/1961	FC2345Test	1/1/15 0:00	Null	HS_OR_CAREOREGON
User	Test 4	10/31/1961	FC2345Test	1/1/15 0:00	Null	HS_OR_CLACKAMAS
User	Test 4	10/31/1961	FC2345Test	1/1/15 0:00	Null	HS_OR_FAMILYDENTAL
User	Test 5	9/13/1961	HS3456TEST	1/1/16 0:00	12/31/17 0:00	HS_OR_TUALITY
User	Test 5	9/13/1961	HS3456TEST	1/1/18 0:00	Null	HS_OR_PROVIDENCE
User	Test 5	9/13/1961	HS3456TEST	1/1/17 0:00	Null	HS_OR_Multnomah
User	Test 8	4/21/2006	HS_123_TEST	1/1/16 0:00	Null	HS_OR_WASHINGTON
User	Test 8	4/21/2006	HS_123_TEST	1/1/18 0:00	Null	HS_OR_KAISER
User	Test 8	4/21/2006	HS_123_TEST	1/1/15 0:00	12/31/17 0:00	HS_OR_TUALITY

III. Real Time Eligibility Lookup

Submitter Values

The following table shows the **required** fields in order to submit a real time request to PH TECH:

Field	Value
ISA01	"00"
ISA02	[blank]

ISA03	"00"
ISA04	[blank]
ISA05	"ZZ"
ISA06	[Business Tax ID]
ISA07	"ZZ"
ISA08	"931211733"
GS02	[Business Tax ID]
GS03	"CIM"
L2100A - NM103	"HS"
L2100B - NM103	[Organization Requesting Lookup]
L2100B - NM109	[NPI OF PROVIDER]

Eligibility Lookup Fields

The following table lists the fields that can be submitted to search for eligibility information for a subscriber:

Field	Value
L2100C - NM109	[Subscriber ID]
L2100C - NM104	[Subscriber First Name]
L2100C - NM103	[Subscriber Last Name]
L2100C - DMG02	[Subscriber Date of Birth]

PH TECH's 270/271 Eligibility Lookup Service supports the following search combinations:

1. Subscriber ID (NM109)

- The Subscriber ID can be used in any combination of other supported search fields. Other search criteria are not required, but will help ensure the most accurate match.
- If first and last name are provided with a Subscriber ID, the search will still return a successful match if one name is incorrect. Examples:

Example record:

- ID 123456
- First Name: Robert
- Last Name: Jones
- A search for: 123456 Bob Jones would return successfully

- A search for: 123456 Robert Smith would return successfully
 - A search for: 123456 Bob Smith would NOT return a matching record
2. First Name (NM104), Last Name (NM103) and Date of Birth (DMG02)
- All elements must match exactly. Examples:
 - Example record:
 - DOB 1/14/2001
 - First Name: Robert
 - Last Name: Jones
 - A search for: 1/14/2001 Robert Jones would return a successful match
 - A search for: 1/14/2001 Robert Smith would NOT return a matching record
 - A search for: 1/14/2001 Bob Jones would NOT return a matching record
 - A search for: 1/14/2002 Robert Jones would NOT return a matching record

Lookup Limitations

The following table describes the maximum number of loops that may appear in a Real Time Transaction operations. Currently lookups are limited to a single source, a single receiver and single subscriber:

270 - Loop	Repeats
2000A – Information Source Level	1
2000B – Information Receiver Level	1
2000C – Subscriber Level	1
2110C – Subscriber Eligibility or Benefit Inquiry	1
2100D – Dependent Name	0 - This functionality is currently not available

Inquiry Results (271)

Eligibility inquiry results returned in the 271 will be based on the criteria specified in the 270. Per the DMAP companion guide, multiple eligibility lines will be returned if multiple matches are found. However, if the inquiry results in multiple members, no results will be returned. The following error codes are used to identify these scenarios:

2100A Information Source Name -> AAA Segment -> AAA_03 Reject Reason Code

- Error code 79 indicates that the 270 request was for an invalid plan (payer)
- Error code 41 indicates that the user does not have access to the plan (payer) requested in the 270

2100B Information Receiver Name -> AAA Segment -> AAA_03 Reject Reason Code

- Error code 41 indicates that the api key is invalid or the provider NPI does not have access to the requested plan (payer) requested in the 270

2100C Subscriber Name Loop -> AAA Segment -> AAA_03 Reject Reason Code

- Error code 76 will be used if multiple results were found matching the inquiry criteria.
- Error code 15 indicates that the minimum search criteria was not met (See *Eligibility Lookup Fields* above)
- Error code 78 indicates that the member was not found under the plan (payer) specified in the 270
- Error code 72 indicates a failed Subscriber ID match
- Error code 73 indicates a name mismatch
 - If a Subscriber ID is not provided and any name does not match exactly
 - If a Subscriber ID is provided and both names do not match exactly
- Error code 71 indicates a Date of Birth mismatch (when Subscriber ID is not provided)

The 271 response does not support the advanced response codes defined in the DMAP Companion Guide, Appendix B:

<http://dfr.oregon.gov/laws-rules/Documents/OAR/companion-guide-v1.0.pdf>