Michigan Department of Community Health

Instructions – CHAMPS Business-to-Business Testing

ASC X12N 837 v5010 CLAIMS Transactions

Introduction

The Michigan Department of Community Health currently requires electronic submission of Health Care 837 Claim transactions using the ASC X12N 837 - Version 4010 format. On January 1, 2012 the health care industry is required to implement the ASC X12N 837 - Version 5010 format for electronic 837 claims transactions.

The following 837 v5010 format versions will apply to Health Care claim transactions effective January 1, 2012, and will be used for State of Michigan 837 v5010 claims testing:
- 837 Claims - Professional version: 005010X222A1
- 837 Claims - Institutional version: 005010X223A2
- 837 Claims - Dental version: 005010X224A2

Resources

You will need to reference the ASC X12N 837I, 837D and 837P v5010 Technical Reports Type 3 (TR3; formerly known as the Implementation Guides) to create v5010 837 claim transactions. MDCH does not provide the TR3 documents, which are available for purchase from Washington Publishing Company, at: http://www.wpc-edi.com/.

Other supporting reference material related to the MDCH claim submission process is found at the website: www.michigan.gov/5010ICD10 This MDCH webpage contains important process information and should be reviewed prior to submitting electronic claim transactions. Some of the information found on the webpage includes:

- MDCH Companion Guides – These documents provide essential details regarding MDCH data requirements for each transaction format (837P, 837I, 837D). These companion guides provide data clarification for purposes of the MDCH claim submission process and must be used in conjunction with the corresponding ANSI X12N Technical Reports.

- 5010 Frequently Asked Questions – This document provides information on Michigan's v5010 implementation.

- HIPAA 5010 and ICD-10 Preparedness – A presentation by MDCH and Blue Cross Blue Shield of Michigan, on plans for test and deployment of these mandated changes.

- MDCH Stage 2 Snapshot Date – The "Snapshot Date" (as-of date) of the data in the Stage 2 - CHAMPS B2B Testing environment. It provides the most recent refresh, or snapshot, date for Trading Partners' reference when preparing test transactions.

- The MDCH Electronic Submission Manual - March 18, 2011 – This reference manual provides information on access and use of the Data Exchange Gateway (DEG) for exchange of electronic files with MDCH.

CHAMPS Business to Business (B2B) Claims Testing

Overview

MDCH has implemented a two-stage testing process for validation of 837 v5010 claims transactions submitted by its Trading Partners. Partners must complete this testing process prior to December 22, 2011 to insure electronic data exchange within the Michigan Medicaid Business community will operate successfully following the January 1, 2012 implementation of the v5010 standards in the CHAMPS system. Stage 1 – Integrity Testing must be completed by Trading Partners before proceeding to Stage 2 - CHAMPS (B2B) Testing. MDCH is not in a position to support wide-scale problem diagnosis for transactions that do not pass Stage 1 Integrity Testing.

Michigan's 837 v5010 implementation requires more data content than previously: it is important that you correctly populate all fields to ensure transactions pass validation using the v5010 format.

- **Stage 1 - Integrity Testing** is required for all electronic submitters, and will be performed using the EDIFECS Ramp Manager automated testing website. Ramp Manager is available at no cost to MDCH's Trading Partners. This tool provides an easy-to-use environment to test 837 v5010 claims for HIPAA syntax and format compliance, and for MDCH syntax compliance. Ramp Manager does not verify data such as NPI or beneficiary ID, which will be verified during Stage 2 CHAMPS B2B Testing. It is recommended you use valid information in Stage 1 test files, in anticipation of Stage 2 testing, which will verify such information.

- **Stage 2 – CHAMPS B2B Testing** is the process of submitting test files to MDCH for processing though the MDCH CHAMPS B2B Test System. B2B testing confirms the ability of your system to interact with the MDCH CHAMPS electronic submission process, and validates the processing of your 837 claims transaction files. Trading Partners are asked to submit up to a maximum of 50 individual claims per test, using a representative sample of the types of claims submitted on a regular basis. Send files containing active Medicaid beneficiaries: do not enter "fake" Medicaid ID numbers. Test claims are not live claims and will not be paid.

The following provides additional information regarding the two stages of testing activity.

Stage I – Integrity Testing Process (April-December 2011)

Stage 1 - Integrity Testing uses the Ramp Manager website to confirm the syntax and format of transactions to be submitted for testing in the MDCH CHAMPS B2B Test System.

1. Before you can begin Integrity Testing using the Ramp Manager automated testing tool, you must first receive an email invitation from the MDCH State of Michigan Testing Community Administrator, which will provide you a Username, a Password, and a link to the Ramp Manager website.

2. If you have not received an invitation email to join the Ramp Manager Test community, and are a previous electronic submitter of CHAMPS transactions, please contact the MDCH B2B Test Team at: MDCH-B2B-Testing@michigan.gov to obtain a Username and Password.

3. When you have received your Ramp Manager Username and Password, please reference the MDCH Ramp Manager Testing Partner Startup Guide during your first logon to the website. Logon using your assigned Username and Password; confirm your Profile; change your Password; read the Reference Materials, add co-worker Contacts; open your assigned testing Programs, and perform the listed Tasks to test your claims files.

   Note: Test files should contain a representative sample of the transactions you routinely send to MDCH; for additional details please refer to "Stage 2 - CHAMPS B2B Testing Process".

4. Record your step-by-step progress within Ramp Manager. On occasion, you may be sent an email questionnaire regarding various parts of the test process.

5. Continue testing with Ramp Manager, using a wide variety of claims, until you verify that your system generates HIPAA-compliant 837 v5010 claims.

6. Request an MDCH review in the last Stage 1 Task. This certification by MDCH must be received before sending an 837 claim transaction file to MDCH for Stage 2 - CHAMPS B2B Testing.

Stage 2 – CHAMPS B2B Testing Process (July-December 2011)

Stage 2 – CHAMPS B2B Testing is performed after completion of Stage 1 – Integrity Testing, and consists of submitting test files to MDCH for processing through the MDCH CHAMPS B2B Test System.

Note: Stage 2 - CHAMPS B2B Testing requires: a) the submitter is an approved MDCH electronic submitter; and b) test transactions are submitted electronically via the MDCH Data Exchange Gateway (DEG). Refer to the *Resources* section of this document for information regarding electronic submission.

Follow these steps to perform Stage 2 - CHAMPS B2B Testing:

1. Create a test file of 837 claims, using your billing system and EDI software (or service bureau). The test claim file(s) must adhere to the following:

    o   Each file must contain less than 50 claims; conform to the specifications in the Companion Guide and TR3; and reference actual, valid subscriber identifiers (Medicaid ID numbers, Client Identification Numbers (CIN), or unique plan-assigned identification numbers).

    o   Include at least 10 prior adjudication (Coordination of Benefits – COB) claims, with Michigan Medicaid noted as a secondary or tertiary payer.

    o   The Interchange Envelope (ISA segment) must specify D00111 (left-justified, followed by 9 spaces, to fill the required 15-character length) in the ISA08 data element

    o   The Interchange Envelope (ISA segment) must specify T in the ISA15 data element.

    o   The Interchange Envelope (ISA segment) may contain one or more Functional Groups. Per X12 guidelines, each Functional Group will specify the type of claim transactions it contains (Professional, Institutional, or Dental), and cannot contain different transaction types (e.g. both 837P (Professional) and 837I (Institutional)).

    o   The Functional Group (GS segment) must specify D00111 in the GS03 data element

    o   The Functional Group (GS segment) must contain one of the following in the GS08 data element:

        o   **005010X222A1** for Professional claims; or

        o   **005010X223A2 for Institutional claims; or**

        o   **005010X224A2 for Dental claims**

    o   The Stage 2 - CHAMPS B2B Testing environment will be loaded with a copy of production CHAMPS data as-of the initial "snapshot date" of April 6, 2011. Submit test files for beneficiaries who were Medicaid-eligible as of the snapshot date: claims submitted for more-recently eligible beneficiaries will likely be denied in the Stage 2 – CHAMPS B2B Test environment.

        Note regarding the "snapshot date": The test environment will occasionally be refreshed with CHAMPS Production data from a more-recent "as-of" date. Please look for announcements of the refresh and current snapshot date in the MDCH Stage 2 Snapshot Date document on the MDCH website, at: www.michigan.gov/5010ICD10 (see Resources section of this document); and also on the Ramp Manager Welcome to State of Michigan community screen, in the Notes section.

837 Claims

> o   Save the file on your PC, or on a shared network location.

2. Log onto the State of Michigan Data Exchange Gateway (DEG) and submit your 837 v5010 test file, using the connection information in the MDCH Electronic Submission Manual.

    o   MDCH electronic submitters can submit their CHAMPS B2B 837 claims test transaction file(s) via the Data Exchange Gateway (DEG) using one of the following:

    > o   File Transfer Protocol (FTP) using the PUT command:

    > > PUT {your drive\directory\filename} **5475T**@DCHEDI

    > - OR -

    > o   MDCH Internet Connection (DEG web portal) url: https://dxgweb.state.mi.us/cgi-bin/messageway/mwi.cgi

    > After logging in: 1) click on the Upload link; 2) enter **DCHEDI** as the Mailbox; 3) enter **5475T** as the Application ID; 4) select the applicable transfer mode (usually, 'Text'); 5) browse to select the CHAMPS B2B claims test file; and, 6) click on the Upload button to submit the selected file.

    For either submission technique above, use an Application ID of **5475T** for 837 Test claims in the v5010 format. The MDCH Electronic Submissions Manual provides additional information regarding the file submission process (refer to the *Resources* section of this document).

3. You must then send a claims B2B test notification e-mail that includes a contact name, telephone number, and the type of test 837 v5010 claim file submitted (837P, 837I, or 837D) to notify MDCH you have submitted a test file:

    o   Please use a subject line of "ZZZZ Claim Test for DCH00XX," where "ZZZZ" = transaction type (e.g., 837P), and "DCH00XX" is your MDCH-assigned electronic submitter ID ("DEG ID").

    o   The claims B2B test notification e-mail must be sent to the following CHAMPS B2B Test Team contacts:

    > To: MDCH-B2B-Testing@michigan.gov and AutomatedBilling@michigan.gov

4. Your test file will be received and validated by MDCH:

    o   A TA1 Interchange Acknowledgement will be posted to the submitter's DEG mailbox, if the submitted file had a value of **1** in the ISA14 data element of the Interchange Envelope. Submitters should check their DEG mailbox for this acknowledgement.

    o   If the test claims are rejected at validation, a 999 Functional Acknowledgement transaction will be posted to the submitter's DEG mailbox; submitters should check their DEG mailbox for this acknowledgement. Review and consult the HIPAA TR3 specifications, and/or Companion Guide specifications, to identify needed corrections.

    o   If the file is successfully validated, a 999 Functional Acknowledgement transaction will be posted to the submitter's DEG mailbox; and the test file will be loaded into the MDCH CHAMPS B2B Test System.

    o   Please note: the generation of the 999 Functional Acknowledgement transaction should occur within hours, assuming there are no severe structural issues with the 837 file. If significant errors occur, your Stage 1 - Integrity Testing (Ramp Manager) test history will be reviewed: if incomplete, you will be asked to complete Stage 1 - Integrity Testing before further Stage 2 – CHAMPS B2B Testing proceeds.

5. When your test file has been successfully translated, the claims will be adjudicated in the MDCH CHAMPS B2B Test System. If you have a question, please send an email to: MDCH-B2B-Testing@michigan.gov.

Trading Partner Certification Criteria

These are the criteria a trading partner must meet in order to be certified for transmission of production 837 v5010 claim transactions. Trading partners must submit separate test files and obtain separate approval for each transaction type (Professional, Institutional, Dental) they wish to submit in production. The Trading Partner may submit as many tests as necessary to verify the transactions are correct. For certification, the Trading Partner will need to submit one file of each transaction type, for Stage 1 and Stage 2 certification, that meets the following criteria.

Stage 1 – Integrity Testing

Each Trading Partner must send a representative sample of at least 30 unique claims that demonstrate the following:

1. Ability to pass initial validation tests, with no validation rejections reported by Ramp Manager (analogous to receiving a "clean" 999 Functional Acknowledgement transaction). This will address inclusion of mandatory data fields and structural elements and will enforce essential balancing requirements
2. Ability to submit multiple claims that include evidence of coordination of benefits (COB), by reporting both primary and secondary (and possibly tertiary) payment information

Stage 2 – CHAMPS B2B Testing

Each Trading Partner must send a representative sample of at least 30 unique claims that demonstrate the following:

1. Ability to pass initial validation tests, as demonstrated by receipt of a "clean" 999 Functional Acknowledgement transaction
2. Ability to send at least some claims that result in issuance of a payment transaction
3. Avoidance of an abnormally high percentage of claims that end up in a "pended" status, requiring further manual effort by MDCH staff
4. Ability to submit multiple claims that include evidence of Coordination of Benefits (COB), by reporting both primary and secondary (and possibly tertiary) payment information.

The objective in requesting unique claims is to obtain sample transactions generated from Trading Partners' systems, rather than a single transaction duplicated multiple times to create a larger transaction set. For claims, this could be transactions for different beneficiaries, on different dates of service, using different procedure codes, by different rendering providers, etc.

Completion of Testing for HIPAA 837 v5010 Claims Transactions

Following successful conclusion of your Stage 2 – CHAMPS B2B Testing, logon to Ramp Manager, access the test Program, and complete the Certification Request Task. MDCH will review your test history and notify you if further testing is needed. If your test results are approved, you will be advised to submit claims transactions using the new 837 v5010 format beginning January 1, 2012.

Electronic claim transactions in the 837 v5010 format will be accepted starting on January 1, 2012. Prior to January 1, 2012, electronic claims will <u>only</u> be accepted in the current v4010A1 format.

> **Note for future reference:** Production claim files transmitted beginning January 1, 2012 must be changed to use a DEG Production File Application ID of **5475** and to use a **P** in the ISA15 data element of the Interchange Envelope.

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If you have a question, please send an email to:

MDCH-B2B-Testing@michigan.gov.

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