

*simplifying healthcare administration*

**CAQH**<sup>®</sup>

## **CAQH CORE Voluntary Certification National Webinar:**

Roadmap to HIPAA Conformance:  
Is CORE Certification Right for your Organization?  
An EHR Vendor Perspective

June 25<sup>th</sup>, 2015  
2:00 – 3:00pm ET

**CORE**<sup>®</sup>

Committee on Operating Rules  
for Information Exchange

A CAQH Initiative

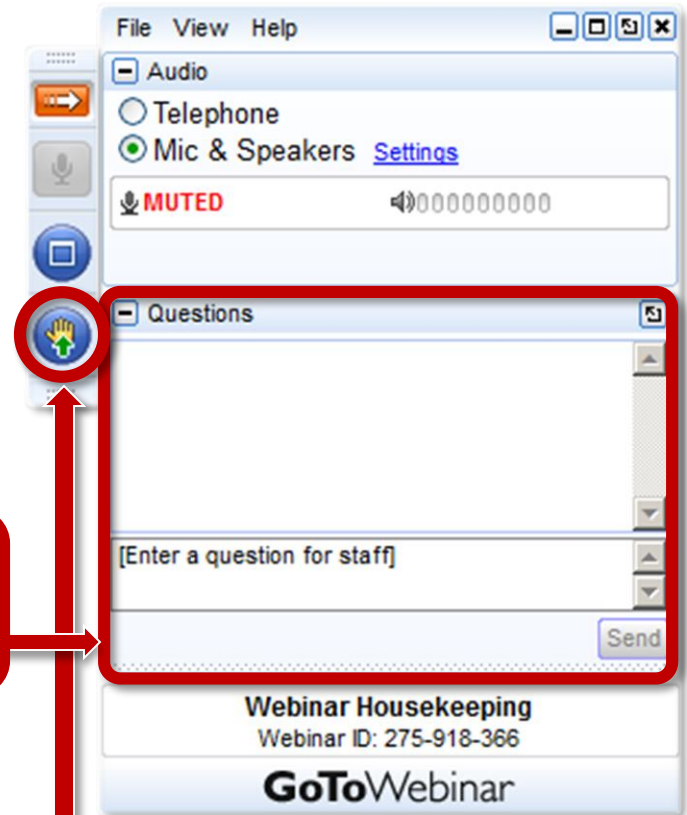
# Session Topics

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- Welcome & Introduction
- Voluntary CORE Certification: Entities that Can Become CORE-Certified
- MEDITECH: CORE Certification Phase I & II
- Voluntary CORE Certification: Getting Started
- Edifecs Conformance Testing Portal
- Q&A

# Participating in Today's Session

- Download a copy of today's presentation on the [CAQH.org website](http://CAQH.org)
  - Navigate to the CAQH CORE Education Events page and access a pdf version of today's presentation under the list for today's event
- The phones will be muted upon entry and during the presentation portion of the session
- At any time throughout the session, you may communicate a question via the web
  - Submit your questions on-line **at any time** by entering them into the **Q&A panel on the right-hand side of the GoToWebinar desktop**
  - On-line questions will be addressed first
- There will be an opportunity today to submit questions using the telephone
  - **When directed by the moderator, press the "raise hand" button to join the queue for audio questions**





***Voluntary* CORE  
Certification: Entities that Can  
Become CORE-Certified**

# Why Certify?

- In an environment of heightened enforcement, healthcare organizations are concerned about having systems that are compliant with government requirements and having trading partners and vendors with compliant systems.\* Examples of evolving enforcement:
  - ACA-mandated HHS Health Plan Certification (proposed)
  - ACA-mandated Audits
  - New CMS Division: Division of Administrative Simplification Compliance
- Administrative time and cost savings: Smoother ongoing use and industry transition to new federally mandated standards and operating rules results in more immediate and widespread cost savings
  - Many in industry attribute implementation difficulties to a lack of a consistent testing process or framework\*\*

\*65% of Practice Management Buyers are looking to replace existing medical software. The most common reason for replacing existing practice management or billing systems was that they weren't confident their current systems achieved regulatory compliance. ([Medical Practice Management Software Buyer View 2014](#)).

\*\* See the September 21, 2012 letter to HHS from NCVHS: "Re: Findings from NCVHS Hearings on Administrative Simplification in June 2012 – an update on Health Care Administrative Care Administrative Transactions." See also, "Transaction Compliance and Certification: A White Paper Describing the Recommended Solutions for Compliance Testing and Certification of the HIPAA Transactions," prepared by the Workgroup for Electronic Data Interchange (WEDI) Transactions Workgroup, March 10, 2010.



# What is Voluntary CORE Certification?

- *CORE Certification is the most robust and widely recognized industry program of its kind. It employs a multi-faceted, independent approach to demonstrating conformance with CAQH CORE Operating Rules*
  - Requirements developed by broad, multi-stakeholder representation through a transparent discussion and polling process
  - Requires conformance testing by independent third party testing vendors that are experts in EDI and testing
  - CAQH CORE serves as a neutral, non-commercial administrator:
    - Authorizes the conformance testing vendors
    - Reviews applications and conformance test reports before Certification is awarded
- Award and display of a CORE Certification Seal
  - Allows entities to publicly communicate their conformance to their trading partners, their customers, and the broader healthcare industry, while promoting administrative simplification
  - All CORE-certified entities know what to expect of other CORE-certified entities
  - Is proposed by HHS as a Document of Compliance in ACA-mandated Certification of Compliance Proposed Rule

# Entities that Can Become CORE-Certified

Health Plan Stakeholder Types	Provider Stakeholder Types	Clearinghouse Stakeholder Types	Vendor Solutions or Products
HIPAA-covered Health Plan	HIPAA-covered Provider	Clearinghouse as defined by HIPAA	Health Plan vendor service
Third Party Administrators	Physicians	Clearinghouse (not covered by HIPAA)	Health Plan vendor product
Health Insurance Issuer	Hospitals	Health Information Exchange	Provider vendor service
Government Payers, including Medicaid Plans	Provider's agent	Health Insurance Marketplaces or Exchanges	Provider vendor plan
Group Health Plan	Independent Physician Association	Financial Institution	
Health Plan Agent			

# Why Entities Get CORE-Certified

Health Plan Stakeholder Types	Provider Stakeholder Types	Clearinghouse Stakeholder Types	Vendor Solutions or Products
<ul style="list-style-type: none"> <li>Give assurance of their conformance with federally mandated operating rules</li> </ul>	<ul style="list-style-type: none"> <li>Inventory whether their systems, and the systems of their business associates, are conformant</li> </ul>	<ul style="list-style-type: none"> <li>Add value for current customers and attract new ones</li> </ul>	
<ul style="list-style-type: none"> <li>Position themselves as leaders in administrative efficiencies</li> </ul>	<ul style="list-style-type: none"> <li>Expedite a better patient experience and increase patient satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>Meet a trading partner contract expectation; being asked of by both health plans and providers</li> </ul>	
<ul style="list-style-type: none"> <li>Lower cost within their claim processing system</li> </ul>	<ul style="list-style-type: none"> <li>Ensure their revenue cycle is the most cost effective</li> </ul>	<ul style="list-style-type: none"> <li>Message to their clients of commitment to effective claims processing and/or revenue cycle management</li> </ul>	



# CORE Certifications Awarded by Stakeholder Type

Major national entities that have achieved CORE Certification include:

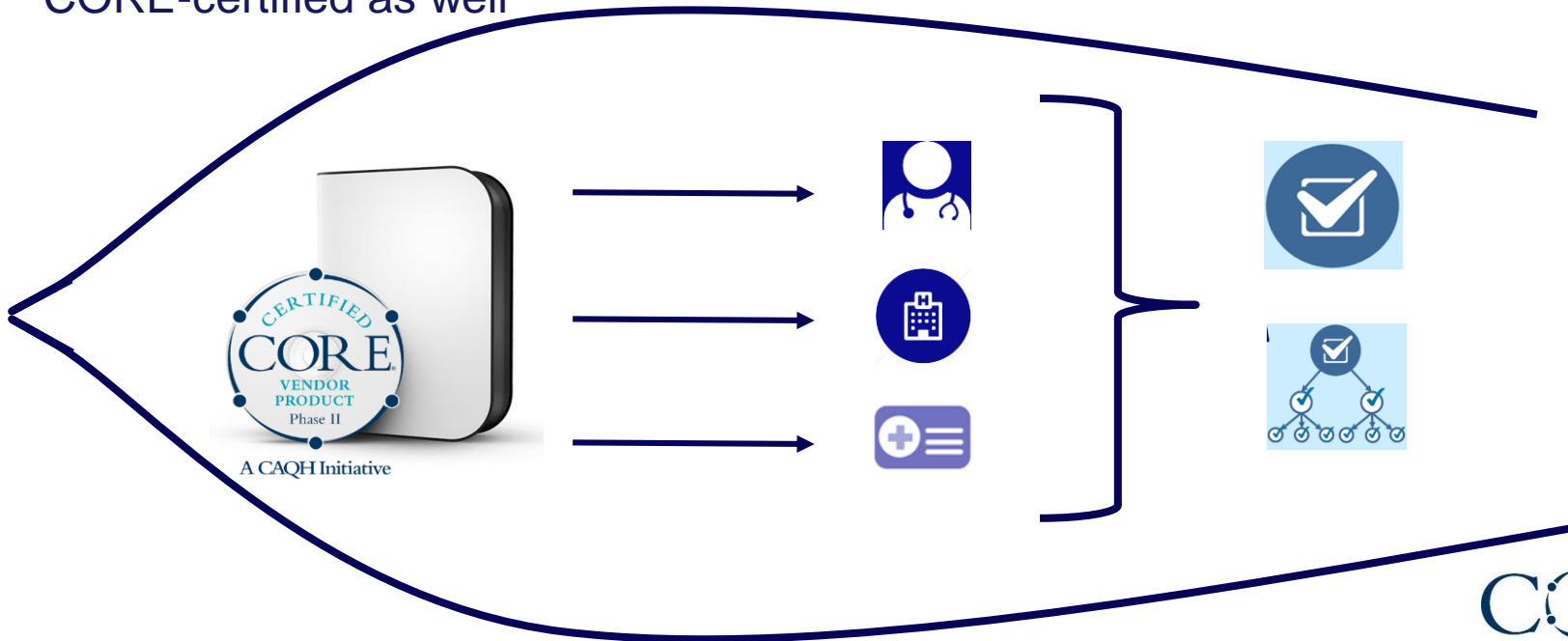
Health Plan Stakeholder Types	Provider Stakeholder Types	Clearinghouse Stakeholder Types	Vendor Solutions or Products
			
			
			
 Horizon Blue Cross Blue Shield of New Jersey			

# Certification of Vendor Products: The “Slipstream” Effect

## A Vendor’s Customers can “Draft” behind a Vendor Product’s CORE Certifications:

When a non-HIPAA covered EHR/PMS company obtains CORE Certification for its product...

- It gives its customers assurance that the product is conformant with the federally-mandated operating rules, AND
- It gives its customers the opportunity to leverage that Certification and become CORE-certified as well



# Polling Question #1:

## Voluntary CORE Certification

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Do you anticipate that your organization will become CORE-certified?

1. Yes
2. Unsure
3. No
4. Not applicable to my stakeholder type
5. Already CORE-certified



**MEDITECH**

Reimagining healthcare.

*Redefining productivity.*

# **MEDITECH**

## **CORE Certification: Phase I and II**

Presented by:

Christine Sher, Senior Analyst for Regulatory Compliance

Kyle MacLennan, Lead Software Developer for Interoperability



# MEDITECH's Vital Signs

- Founded in 1969
- More than 2,300 facilities worldwide
- Over 3,900 employees
- Revenues of \$517 million (2014)
- 38 consecutive profitable years
- 5A1 Dun & Bradstreet credit rating
- Employee owned, privately held



# Timeline

7/2011 - Began tracking the operating rules outlined in the Affordable Care Act (ACA)

10/2011 - Started technical evaluation of CAQH CORE Operating Rules for Eligibility and Claim Transactions  
(Certification not required. ARRA/Meaningful Use priority.)

5/2013 - Received request from customers



# Strategic Decision

5/2013 - Received request for MEDITECH to consider certification

- George Conklin, Senior VP/Chief Information Officer at CHRISTUS Health and Board Chairman for CAQH CORE
- MEDITECH and CHRISTUS Health partnership for over 20 years
- 25 inpatient facilities in TX and LA using MEDITECH, totaling approximately 4,800 beds

## Strategic Decision(cont.)

- Collaborated with CHRISTUS Health staff to
  - Evaluate current interface use
  - Prioritize project development
- CAQH CORE Phase I and II for “EDI Eligibility Validation – Version Client/Server 5.66”
- CAQH CORE Phase II for “Claim Status Inquiry and Response – Version Client/Server 5.66” (NEW)
- CAQH CORE Phase III for Electronic Claim Submission/Remittance – Version Client/Server 5.66”

# Benefits of Certification

*“We want healthcare providers to know that whenever they exchange administrative data they can depend on real-time access to information needed to make timely and informed decisions.”*

Howard Messing, CEO and President of MEDITECH

# Benefits of CORE Certification

- Ensure interfaces meet current Operating Rule standards
- Allow for CHRISTUS and other customers to become CORE-certified
- Enhance interoperability between providers and payers
- Ensure customers ease of use and compliance

# START HERE!!!

## CAQH CORE

[http://corecertification.caqh.org/CORE\\_voluntary](http://corecertification.caqh.org/CORE_voluntary)

- [CORE Certification: A Step-By-Step Process](#)
- [FAQs about CORE and CORE Certification](#)

# Project Plan and Milestones

1. [Pre-certification Planning and Systems Evaluation](#) - Obtain and review testing data in order to determine MEDITECH's ability to meet requirements and scope of project
2. [Signing and Submitting the CORE Pledge](#)
3. MEDITECH Project Development/Coding/Testing
4. [CORE Certification Testing](#) - MEDITECH works with a CAQH CORE-authorized testing vendor, [Edifecs](#), to complete Pre-Testing, Testing and Post-Testing
5. [Applying for the CORE Seal](#) - Complete necessary application and pay CORE Seal Fee



# Challenges

## Coding:

- Allocation of resources with existing certification projects and committed release schedule
  - 31 Days to update Eligibility Validation interface
  - 138 Days to design, code and test Claim Status Request/Claim Status Response
- Learning curve specifically with Connectivity

# Challenges

## Testing:

- Learning curve with testing process
- Conformance testing, rather than “production readiness”
- Response time for questions and issues

# Kudos!

- Everything we needed was provided by CAQH CORE or Edifecs
- Testing process was at our own pace
- Saw an instant benefit of processing speed

**Definitely our preferred way to certify!**

**Thank You!**





***Voluntary CORE***  
**Certification:**  
**Getting Started**

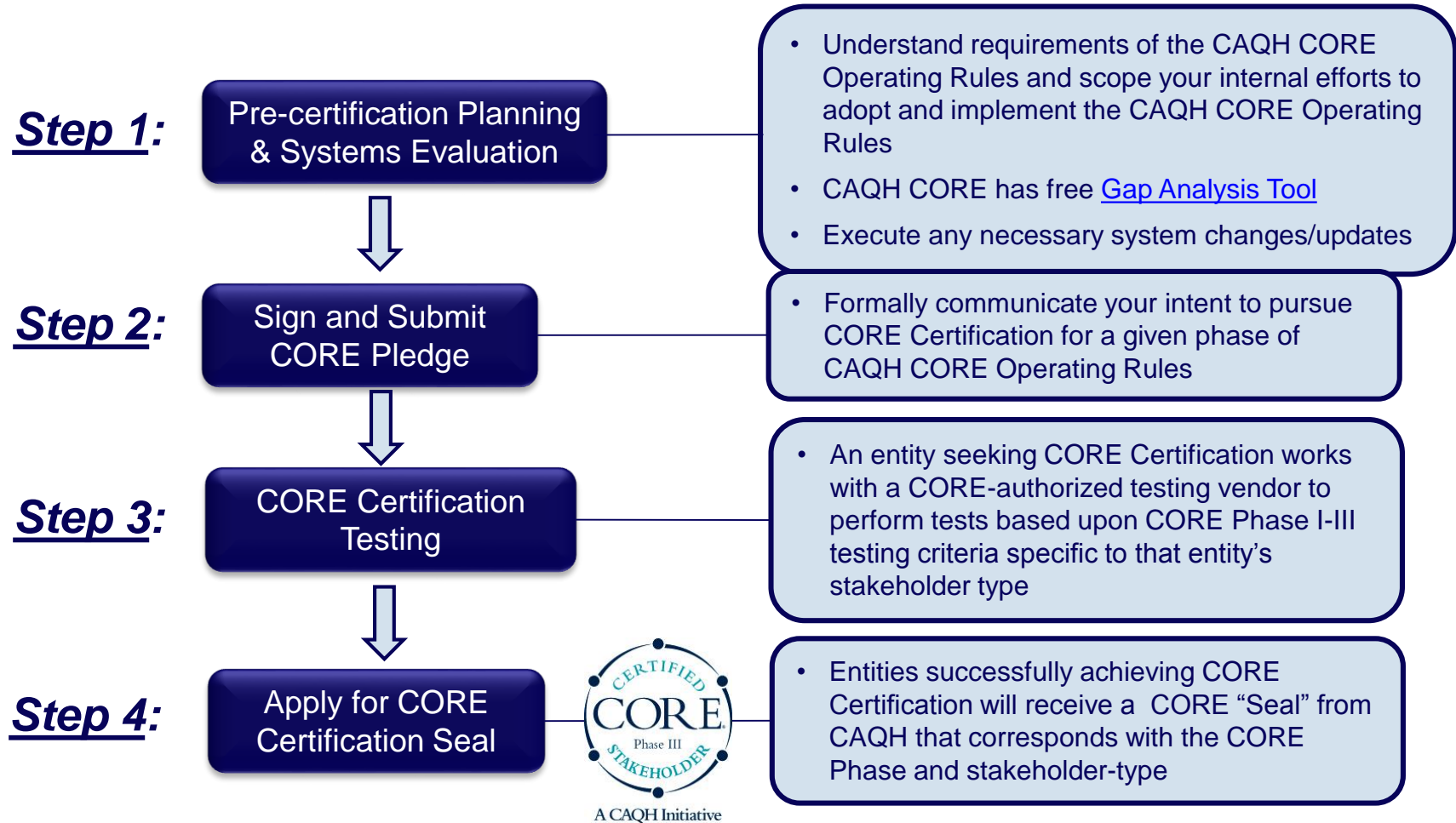
# Who Can get CORE-Certified and for What?

- Voluntary CORE Certification is offered to:
  - Any entities that create, transmit, or use the administrative transactions
  - Specific vendor products or services that enable providers, health plans or clearinghouses to carry out HIPAA-required standard transactions
- CORE Certification Testing is Stakeholder-Specific:
  - Each entity completes testing specific to their stakeholder type to become CORE-certified so testing is relevant to entity's business processes and eliminates non-applicable requirements
- **186 CORE Certifications** have been achieved to date. Access a list of these organizations [HERE](#).
- Is available for the following transactions:
  - Eligibility (Phase I)
  - Eligibility and Claim Status (Phase II)
  - Electronic Funds Transfers (EFT) and Electronic Remittance Advice (ERA) (Phase III)

Learn more about *voluntary* CORE Certification [here](#)



# Voluntary CORE Certification: A Step-by-Step Process



NOTE: If the entity seeking CORE Certification outsources any portion of the applicable transactions to a trading partner, then that trading partner must become CORE-certified for that transaction in order for the seeking entity to complete the CORE Certification process

# Voluntary CORE Certification Testing:

## *Types of Test Scripts*

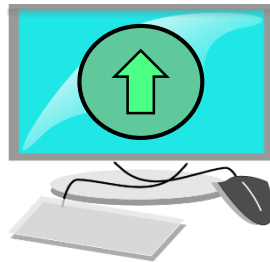
CORE Certification Testing is comprised of stakeholder-specific test scripts for each CAQH CORE Operating Rule

### Attestation



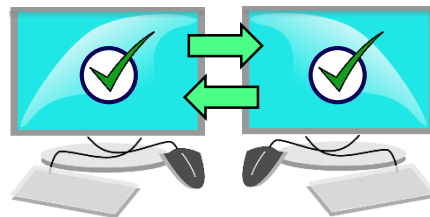
Along with other specified documentation, an entity must sign an attestation signifying their current or planned compliance

### Upload



Upload specified document to the testing site as proof of compliance

### System Transaction



Conduct the actual transaction for which you are testing with the CORE-certified testing vendor

# ACA-mandated HHS Health Plan Certification

Notice of Proposed Rule Making (NPRM)  
published in [Federal Register](#), January 2, 2014

- As of June, 2015, a final rule had not been published

**In its Proposed Rule, HHS turned to  
CORE Certification as a Health Plan  
Certification Compliance Option**

*CORE Phase III Certification  
Seal*



**Framework: Conformance Testing**

- Involves Testing with Independent Testing Entity
- Part of the established [Voluntary CORE Certification Process](#)

**OR**

*HIPAA Credential\**



**Framework: Attestation**

- Requirements outlined in NPRM
- Involves coordination with trading partners
- [Draft forms here](#)

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If you would like to find out more about  
CAQH CORE Certification, contact us at:

**CORE@CAQH.org**

## Polling Question #2:

# CORE Certification of Trading Partners

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How many trading partners is your organization aligned with to meet compliance with the federally mandated operating rules?

1. None
2. One to Three
3. Four to Twenty-Five
4. Twenty-Five +
5. I don't Know/Does not apply



# Edifecs Conformance Testing Portal

Carrie M. Bauman  
Edifecs Compliance Solutions  
[Carrie.Bauman@Edifecs.com](mailto:Carrie.Bauman@Edifecs.com)

edifecs

# Edifecs CAQH CORE Partnership



- **CAQH CORE-authorized Testing Vendor for CAQH CORE Operating Rules Phases I, II and III**
- **Helping healthcare organizations with voluntary CORE certification testing since 2006**
- **186 (and counting!) CORE Certifications as of June 2015**
- **Partnering with CAQH CORE for industry education sessions**

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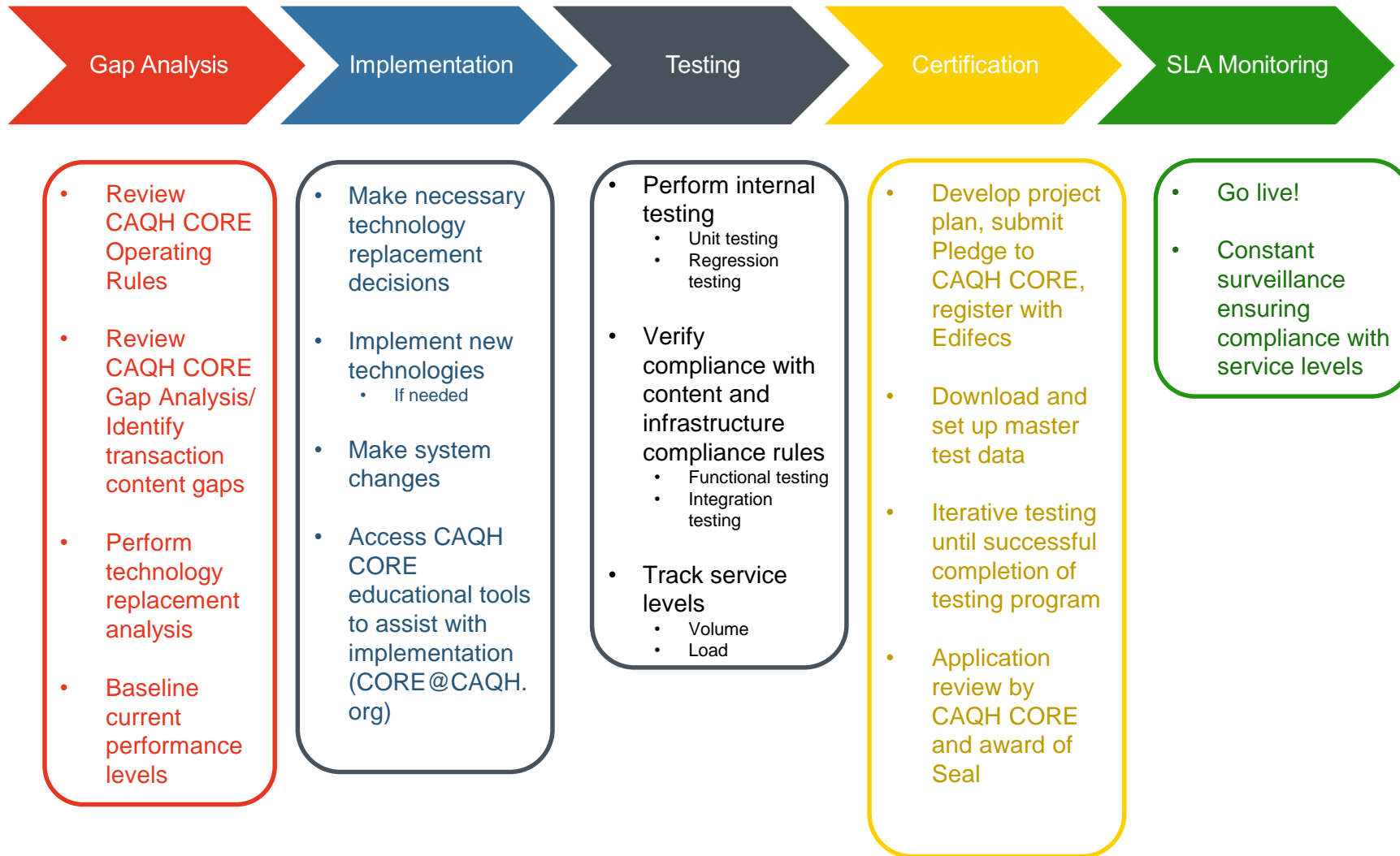
# Agenda slide

1. CORE certification project timeline
2. Tips for getting prepared for conformance testing
3. Signing up for the Edifecs conformance testing portal
4. Basic portal navigation





# CORE Certification Testing Timeline



# Prepare Yourself for Testing

1

Review, understand and analyze the following components of CORE Certification in depth provided by CAQH CORE

- CORE Testing Policy
- CAQH CORE Operating Rules and their applicability
- Master test bed data for CORE Testing
- CORE Test Suite cases

2

On the connectivity side making sure that your system follows the requirements specified in the connectivity specification provided by CAQH CORE.

- Note: The testing entities system must be up to date and conformant with the CAQH CORE Operating Rules connectivity (Phases I/II/III) prior to testing

# Navigation from CAQH CORE Web Site to Edifecs CORE Conformance Testing Portal

<http://www.caqh.org/>

CAQH Home

CAQH CORE

Get It Right the First Time with COB Smart, a CAQH Solution

The Implementation Deadline for Federally-mandated CAQH CORE EFT and ERA Operating Rules was January 1, 2014.

CAQH solutions > EFT Enrollment

Committee on Operating Rules for Information Exchange

CAQH CORE is a multi-stakeholder initiative developing operating rules that:

- Streamline electronic healthcare administrative transactions
- Support interoperability between payers and providers.

CAQH CORE certifies and awards CORE Certification Seals to entities that create, transmit or use the healthcare administrative and financial transactions addressed by the...

CORE Committee on Operating Rules

[http://corecertification.caqh.org/CORE\\_certification](http://corecertification.caqh.org/CORE_certification)

## Certification: HHS Proposed Program and CORE

### CORE Certification

Thank you for your interest in CORE Certification. CAQH certifies and awards CORE Certification Seals to entities that create, transmit, or use the healthcare administrative and financial transactions addressed by the CAQH CORE Operating Rules. CORE Certification means an entity has demonstrated that its IT system, or product, is operating in conformance with applicable requirements of a specific phase(s) of the CAQH CORE Operating Rules.

If you are a health plan, provider, clearinghouse, or vendor interested in information related to the CORE Certification please click [HERE](#).

If you are a HIPAA covered health plan interested in learning more about the mandatory HHS health plan certification or compliance process please continue reading below.

**NOTE:** Organizations that do not create, transmit, or use healthcare administrative and financial transactions, and therefore are ineligible for CORE Certification, can demonstrate their support for the CAQH CORE mission and Operating Rules by applying for and using the CORE Endorser Seal. Please refer to the [CORE Endorser Seal Application Process](#) page for further information.

### ACA Section 1104 Mandated Certification Process

Section 1104 of the [Patient Protection and Affordable Care Act \(ACA\)](#) mandates a [certification process](#) for health plans only. The ACA health plans must file a statement with HHS, in such form as the Secretary may require, certifying that their data and information systems are in compliance with any applicable transaction standards and associated operating rules.

On December 31, 2013, HHS issued a [Notice of Proposed Rulemaking \(NPRM\)](#) on the ACA-mandated health plan certification. HHS accepted public comments on the NPRM through April 3, 2014 (previously March 3, 2014). Comments submitted to HHS may be viewed on [www.regulations.gov](#).

The NPRM includes health plan certification requirements for the eligibility, claim status, electronic funds transfers (EFT), and electronic remittance advice (ERA) transactions. It defines two potential certification options for health plans to meet HHS compliance requirements:

**Option 1: HIPAA Credential.** Under the HIPAA Credential Program it is proposed that health plans will attest to compliance with the HIPAA-mandated transaction standards and operating rules. Once HHS issues the Final Rule later in 2014, draft versions of the HIPAA Credential documentation, as outlined in the NPRM, are currently available on the CAQH CORE website. For more information on Option 1 click [HERE](#).

**Option 2: CORE Certification.** The NPRM proposes to adopt the existing CORE Certification Program, authorized and administered by CAQH CORE. Health plans that successfully complete certification testing with a CORE-authorized testing vendor and submit the required documentation will receive a Phase III CORE Certification Seal demonstrating their compliance. CORE Certification is available now. For more information on Option 2 click [HERE](#).

[http://corecertification.caqh.org/CORE\\_voluntary](http://corecertification.caqh.org/CORE_voluntary)

## CORE Certification

### Background

CAQH certifies and awards CORE Certification Seals to entities that create, transmit or use the administrative transactions addressed by the CAQH CORE Operating Rules. CORE Certification means an entity has demonstrated that its IT system or product is operating in conformance with a specific phase(s) of the CAQH CORE Operating Rules. CORE Certification is available for providers, health plans, clearinghouses, and product vendors.

CORE Certification is one of the two options that HHS has proposed for controlling health plans (CHPs) to meet requirements of ACA Section 1104 Compliance & Health Plan Certification for the eligibility, claim status, electronic funds transfers (EFT), and electronic remittance advice (ERA) transactions. The other proposed option to CHPs is to obtain a [HIPAA Credential](#).

### Applying for CORE Certification

Entities pursuing CORE Certification can become certified on just the Phase I CAQH CORE Operating Rules, both the Phase I & Phase II CAQH CORE Operating Rules, or the Phase I, Phase II, and Phase III CAQH CORE Operating Rules. For more information on how to become CORE Certified visit the [link](#) below.

- [CORE Certification: A Step-By-Step Process](#)
- [FAQs about CORE and CORE Certification](#)

### Commitment to CAQH CORE Operating Rules

To receive a CORE Certification Seal, organizations must sign a binding pledge to adopt, implement and comply with CAQH CORE Operating Rules. By signing the CORE Certification Pledge, the organization commits to work with a [CAQH CORE authorized Testing Vendor](#) to demonstrate that its product or IT system(s) are operating in accordance with the CORE rules. Testing must be completed within 180 days of signing the CORE Pledge. CORE testing and certification is tailored for providers, health plans, vendors and clearinghouses.

### CORE Endorsement

Organizations that do not create, transmit, or use administrative healthcare transactions, and therefore cannot implement the CAQH CORE Operating Rules, are eligible to become [CORE Endorsers](#). More information on the CORE Endorser Application process is available [HERE](#).

# Navigation from CAQH CORE Web Site

To Edifecs Conformance Testing Portal

The screenshot shows the CAQH CORE website home page. The header includes navigation links for About CAQH®, CORE®, CAQH ProView™, EnrollHub™, COB Smart™, and Efficiency Index. The main content area features a large image of two people shaking hands, with the text "CAQH CORE-Authorized Testing Vendors" and a description of the testing process. Below this is the Edifecs logo and contact information for Edifecs CORE Certification Testing, including a phone number and email address. A sidebar on the left contains various links such as "CORE® Overview", "Mandated Operating Rules and Resources", and "FAQ: General and Technical".

<http://www.edifecs.com/login/core-phase-i-ii>

The screenshot shows the Edifecs CORE Phase I/II Login page. The page title is "CORE Phase I/II Login". Below the title is a brief description of the testing service and a "Members Log In" section with fields for Username and Password, and buttons for "Recover Username" and "Recover Password". A "Submit" button and a "Click Here to Register" link are also present. The footer contains navigation links for SOLUTIONS, SERVICES, INITIATIVES, ABOUT US, and Blog.

<http://www.edifecs.com/login/core-phase-iii>

The screenshot shows the Edifecs CORE Phase III Login page. The page title is "CORE Phase III". Below the title is a brief description of the testing service and a "Members Log In" section with fields for Username and Password, and buttons for "Recover Username" and "Recover Password". A "Submit" button and a "Click Here to Register" link are also present. The footer contains navigation links for SOLUTIONS, SERVICES, INITIATIVES, CUSTOMERS, INSIGHTS, ABOUT US, and Blog.

# Navigating from [www.edifecs.com](http://www.edifecs.com)

To Edifecs Conformance Testing Portal

The screenshot shows the Edifecs homepage. At the top left is the 'edifecs' logo. In the center is a diagram titled 'Pathways to Partnerships™' with a central 'Partners' node connected to 'Employers', 'Providers', 'Exchanges', and 'Government'. Below this is a line graph showing that 2% of the population was managed by new partnership models in 2014, and 30% in 2018. At the bottom are three icons: '5 Industry Initiatives', 'Download Overview', and 'Advisory Services'.

This banner features the headline 'Trust your compliance to a rock-solid industry leader' and the subtext 'Comply with mandates. Simplify and save.' It includes images of software interfaces and a navigation bar with icons for Overview, ICD-10, ICD-10 Transition Services, Operating Rules, and Provider Testing.

This is a content page titled 'Tips and tricks for CORE certification and Operating Rules Implementation'. It features a yellow background with a gear icon and a 'Subscribe' form on the right side.

The navigation menu is displayed on a dark background. A red circle highlights the hamburger menu icon in the top left. A red arrow points from this icon to another red circle around the 'Client Login' link in the top right. Below the navigation bar, the 'SOLUTIONS' section is organized into four columns: Trading (SpecBuilder, XEngine Server, Transaction Management), Conformance (ICD-10, Operating Rules, Enterprise Testing), Financial (Revenue Integrity, Population Management), and Clinical (Clinical Data Integration, Population Health). The 'INITIATIVES' section lists Shift Volume to value, Population Health Management, Retail Orientation & Consumerism, Risk Adjustment, and Administrative Simplifications. The 'SERVICES' section includes Strategic Advisory Services, Professional Services, Product Support, and Edifecs University. The 'INSIGHTS' section has a red circle around 'Resources' and 'Webinars'. The 'CUSTOMERS' section is currently empty. The 'ABOUT US' section includes Company (Who is Edifecs?, Leadership, Partners), News Room (News & Events, Awards), and Careers (Why work at Edifecs, Open Positions, Teams). At the bottom are social media icons for Edifecs, LinkedIn, and Twitter, followed by the tagline 'We build IT partnership solutions for a dynamic healthcare ecosystem.' and links for Privacy Policy and Terms of Use.

# Navigating from [www.edifecs.com](http://www.edifecs.com)

## To Edifecs Conformance Testing Portal

The screenshot shows the Edifecs website homepage. At the top, there is a navigation bar with links for Blog, Careers, Client login, Vertical industry, International, and Contact us. Below this is a secondary navigation bar with dropdown menus for Initiatives, Solutions, Services, Customers, Insights, and About Us. The main content area is divided into several sections:

- Client Login**: A large heading for the login section.
- Commerce Desk Login**: A section describing the CommerceDesk Online service, which is a subscription-based industry resource site for integration/middleware professionals. A red button labeled "Commerce Desk" is located below this section.
- Global Industries Standards Support**: A section describing the CommerceDesk service, which includes testing and certification for X12, UN/EDIFACT, and TRADACOMS standards.
- Gold Standard for Validation**: A section describing the production validation solution, XEngine, which validates more transactions than any other.
- Resource Center**: A section describing online resources such as standard transaction sets, implementation guidelines, MIGs, and standards organizations.
- Edifecs Compliance Online**: A section describing the HIPAA testing & certification service for healthcare professionals. A red button labeled "Compliance Login" is located below this section.
- ServiceDesk**: A section describing the self-service customer support portal. A red button labeled "Service Desk Login" is located below this section.
- CORE Phase I/II/III**: A section describing the testing service for entities interested in becoming certified. Three red buttons labeled "Core I/II Login", "Core I/II Login", and "Core III Login" are located below this section.

<http://www.edifecs.com/login/core-phase-i-ii>

The screenshot shows the Edifecs CORE Phase I/II Login page. The page has a dark blue header with the Edifecs logo and navigation links. The main content area is white and contains the following elements:

- CORE Phase I/II Login**: A heading for the login section.
- Members Log In**: A section with two input fields for Username and Password, each with a "Recover" link. A "Submit" button and a "Click Here to Register" link are located below the input fields.
- Footer**: A dark blue footer with navigation links for SOLUTIONS, SERVICES, ABOUT US, and Blog/Careers.

<http://www.edifecs.com//login/core-phase-iii>

The screenshot shows the Edifecs CORE Phase III Login page. The page has a dark blue header with the Edifecs logo and navigation links. The main content area is white and contains the following elements:

- CORE Phase III**: A heading for the login section.
- Members Log In**: A section with two input fields for Username and Password, each with a "Recover" link. A "Submit" button and a "Click Here to Register" link are located below the input fields.
- Footer**: A dark blue footer with navigation links for SOLUTIONS, SERVICES, ABOUT US, and Blog/Careers.

# Edifecs Conformance Testing Portal

## Quick Start Guide

http://www.edifecs.com/login/core-phase-i-ii

File Edit View Favorites Tools Help

10 Jvion releases tool to help ... Suggested Sites

edifecs

Blog | Careers | Client login | Vertical industry | International | Contact us

Initiatives v Solutions v Services v Customers v Insights v About Us v

### CORE Phase I/II Login

The Edifecs testing service allows entities interested in becoming certified to perform the requirements necessary to show implementation of all applicable CORE Rules. Registered CORE stakeholders may use their current username/password to logon. Non-registered CORE stakeholders please click the register button to begin the CORE certification testing process. Please see the Edifecs CORE Phase II [Quick Start Guide](#) for more information regarding Phase II CORE Testing.

### Members Log In

Username  [Recover Username](#)

Password  [Recover Password](#)

[Click Here to Register](#)

**SOLUTIONS**  
Trading  
Compliance  
Consumer  
Financial  
Clinical

**SERVICES**

**INITIATIVES**

**CUSTOMERS**

**INSIGHTS**

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Edifecs. We build IT partnership solutions for a dynamic healthcare ecosystem.

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## CORE Users – Quick Start Guide (Phase II)

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CAQH Committee on Operating Rules for  
Information Exchange (CORE)

### User Quick Start Guide

for the

Edifecs CORE Certification Phase II Testing  
System



## CORE Users – Quick Start Guide (Phase II)

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# Edifecs Conformance Testing Portal

Create ID + Login

http://www.edifecs.com/login/core-phase-i-ii

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10 Jvion releases tool to help ... Suggested Sites

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## CORE Phase I/II Login

The Edifecs testing service allows entities interested in becoming certified to perform the requirements necessary to show implementation of all applicable CORE Rules. Registered CORE stakeholders may use their current username/password to logon. Non-registered CORE stakeholders please click the register button to begin the CORE certification testing process. Please see the Edifecs CORE Phase II [Quick Start Guide](#) for more information regarding Phase II CORE Testing.

### Members Log In

Username  [Recover Username](#)

Password  [Recover Password](#)

[Click Here to Register](#)

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# Edifecs Conformance Testing Portal

## Set up Wizard

**Account Registration Wizard**



### Welcome to the Account Registration Wizard

In order to logon to the site, you must first register as a user. This wizard will help you complete the following:


- Ask for information about you
- Ask for information about your organization
- Verify your email address
- Confirm your registration

Click **Next** to continue or **Cancel** to exit the wizard.

**Account Registration Wizard**

### License and Privacy Agreement

Read and confirm the following agreement.



Trading Partner Services Agreement. This Trading Partner Services Agreement ("Agreement") provides the terms and conditions governing Electronic Data Interchange transactions ("Transactions"), equaling one business document (e.g., claim, eligibility, etc.) between the undersigned 'Trading Partner' and Edifecs. Trading Partner and Edifecs are sometimes individually referred to herein as a "Party" and jointly referred to as "Parties". WHEREAS, Trading Partner seeks electronic Transaction services for the purpose of performing CAQH CORE certification testing; and WHEREAS, Edifecs seeks to provide such Transaction services on behalf of CAQH; NOW

I have read the agreement and agree to its terms.

# Edifecs Conformance Testing Portal

**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!

**Account Registration Wizard**

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

**Phone, URL, and Email**

Name:

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:

- Provider (Submit 270 Requests and/or 276 Requests - Information Requestor)
- Provider Vendor (Submit 270 Requests and/or 276 Requests - Information Requestor)
- Health Plan (Receive 270 Requests and/or 276 Requests - Information Source)
- Clearinghouse (Submit 270 Requests and/or 276 Requests - Information Requestor)
- Clearinghouse (Receive 270 Requests and/or 276 Requests - Information Source)
- Clearinghouse (Submit and Receive 270 Requests and/or 276 Requests - Both)

CORE Batch Support:

- Real Time Only
- Both Batch and Real Time

CORE Pledge Date:

# Edifecs Conformance Testing Portal

## Wrapping up and acknowledgement

**Account Registration Wizard**

**Verify Account Creation**  
Enter the following information to verify account creation.

**Word Verification**  
Enter the word as it is shown in the box below. (This step helps prevent automated registrations.)  
This code is case sensitive.\*

MsVucWDU

MsVucWDU

[Help for sight impaired](#)

Cancel Previous Next



**Account Registration Wizard**

**CONGRATULATIONS! Your registration has been successful.**  
The account has been created with the following information:

**Account Summary**

UserName:	carrie.bauman@edifecs.com
E-Mail:	carrie.bauman@edifecs.com

Please make sure that you print and retain a copy of your account information. Click finish to complete registration and return to the login page. Then enter your user name and password to enter the community.


**Important:** Your account activation is pending review by Edifecs. You will be notified by e-mail once your account has been approved by Edifecs. Please add support@edifecs.com to your address book to avoid our e-mails being blocked by your spam filter.

[Click to Print This Page](#)

Finish



Reply Reply All Forward IM  
Tue 6/16/2015 3:50 PM

 support@edifecs.com  
**Account Registration Completed**

To: Carrie Bauman

Dear Carrie Bauman,

Edifecs Compliance Solutions Marketing has been registered for the CORE Certification Testing Community Community. This Community has been set up at no cost to Edifecs Compliance Solutions Marketing to provide you with all the information you need to send and receive EDI data with CORE Certification Testing.

The Community provides a web-based validation tool for you to test transaction compliance with the specifications of CORE Certification Testing. The Community also contains documentation such as EDI specifications in a format which can easily be browsed online or downloaded.

Your account activation is pending review by a community administrator. You will be notified as soon as your account has been approved.

If you have any questions, please feel free to contact us at [support@edifecs.com](mailto:support@edifecs.com).

Sincerely,

Edifecs - A CORE Authorized Certification Testing Vendor  
[support@edifecs.com](mailto:support@edifecs.com)

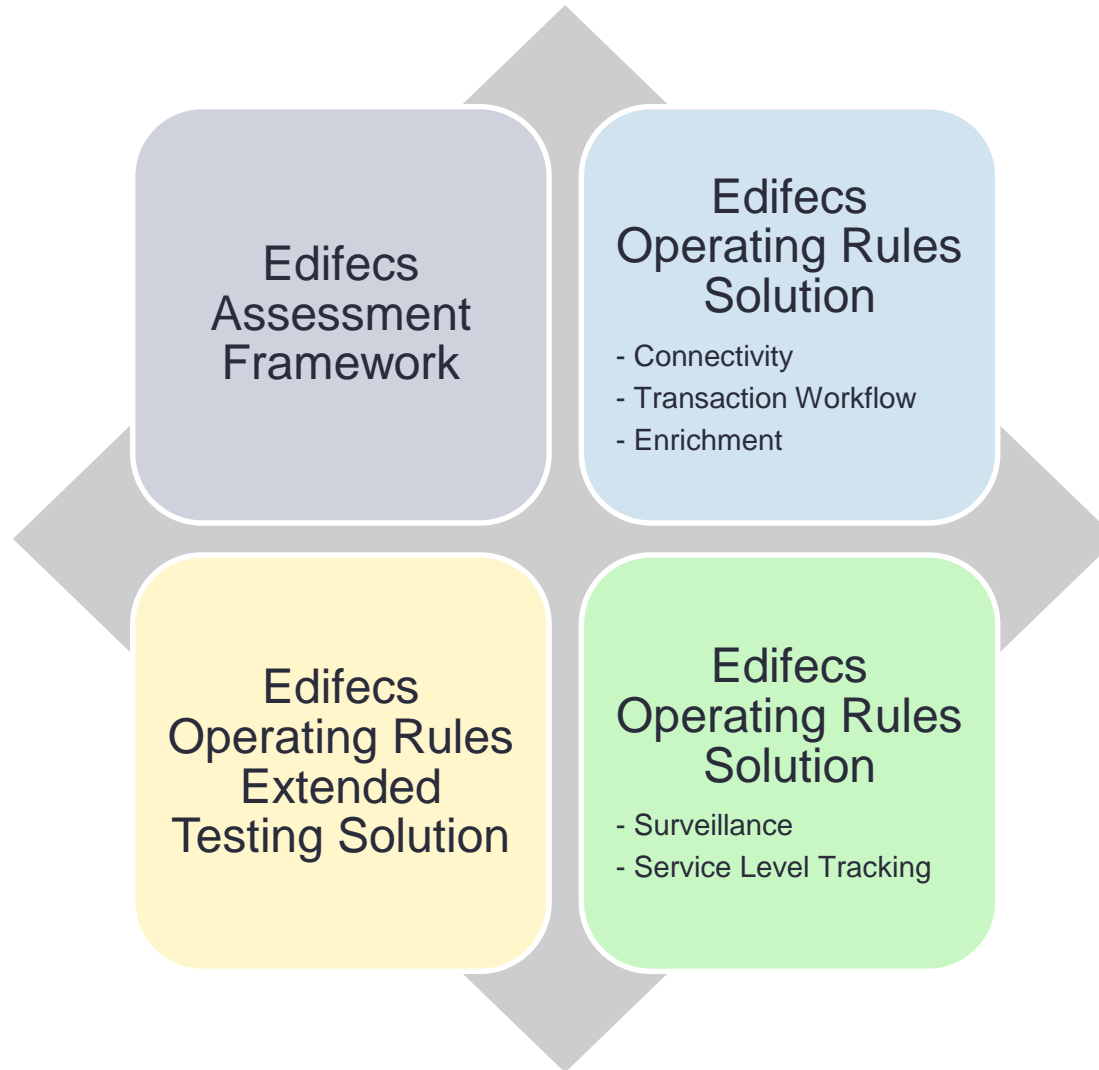
# Keep Educating Yourself

- **Request a copy of the Quick Start Guides**
  - [Carrie.Bauman@Edifecs.com](mailto:Carrie.Bauman@Edifecs.com)
- **Want to learn more about conformance testing? Sign up for the Operating Rules Blog**
  - [www.edifecs.com/e/](http://www.edifecs.com/e/)
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# Additional Edifecs Solutions

De Facto Experts in CORE Conformance Testing for 10 Years







Seattle Business Magazine's, Tech Impact Award



Puget Sound Business Journal, Washington Best Workplaces 3rd consecutive year



Inc. 5000 Fastest- Growing Private Companies in the US 6th consecutive year



100 Fastest Growing Companies in WA



Washington's 100 Best Places to Work For 4 consecutive years



Deloitte Technology Fast 500, North America 5th Consecutive year



Fierce innovation award Top 3 Finalist



Best In Biz Best Place to work: Silver



HCI 100 Healthcare Informatics Ranking #78

## **Polling Question #3**

### **CORE Certification Educational Tools**

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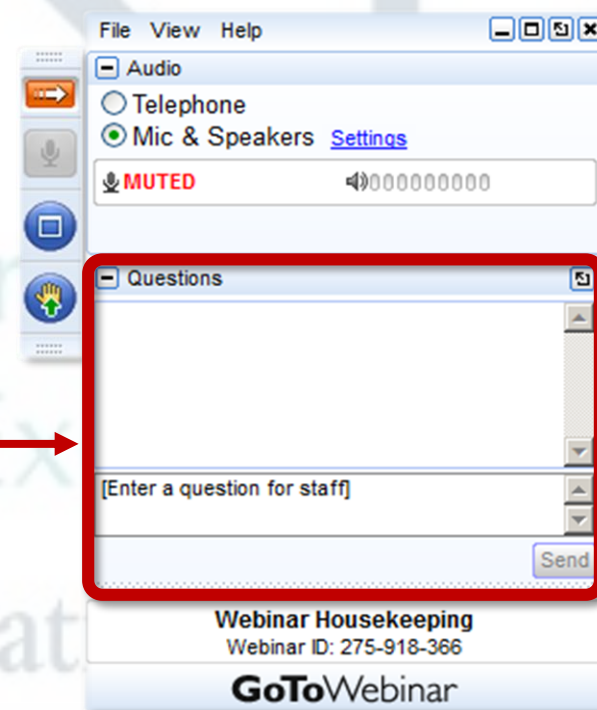
What types of educational tools do you prefer to learn about things like CAQH CORE Operating Rules and CORE Certification? (Pick one or more)

1. These kinds of webinars
2. Text documents (white papers, “how to” guides)
3. Short informational videos (less than 10 minutes)
4. Presentations by organizations that have gone through the process
5. Newsletter-type emails

# Q&A

*Please submit your question:*

- **Via the Web**: Enter your question into the Q&A pane in the lower right hand corner of your screen

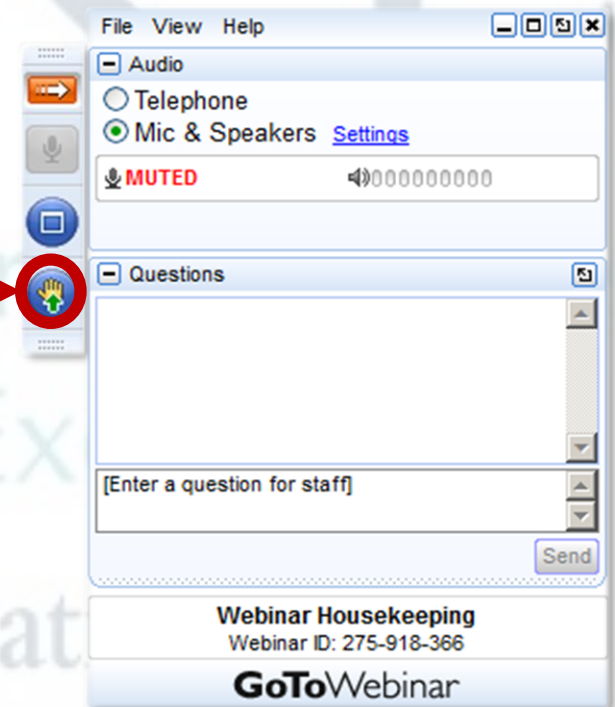


# Q&A

*Please submit your question:*

- **By Phone or VoIP**: When prompted for audio portion of Q&A, please press “Raise Hand” Button to queue up to ask a question

**NOTE**: In order to ask a question during the audio portion of the Q&A please make sure that you have entered the “**Audio PIN**” (which is clearly identified on your user interface) by using your telephone keypad.



## Top Takeaways:

- An EHR Vendor, such as MEDITECH, views CORE Certification as a way to demonstrate to healthcare providers that all administrative data exchanges it undertakes are dependable, real-time and interoperable
- CORE Certification adds value to both HIPAA-covered and non-HIPAA covered entities and products, and gives assurance to conformance with federally mandated operating rules to trading partners using those services and products
- Voluntary CORE Certification is a widely recognized industry program that assures conformance with federally mandated operating rules, adds value to an organization's IT systems or products, and promotes a return on investment through administrative cost savings and attraction of new clients
- The CORE-authorized Testing Vendor Edifecs supports customized CORE Certification Testing specific to an organization's stakeholder type

# Thank You for Joining Us!

We value your opinion. Please complete the online feedback survey at the end of this webinar.

website: [www.CAQH.org](http://www.CAQH.org)

email: [CORE@caqh.org](mailto:CORE@caqh.org)



**@CAQH**