



Voluntary CORE Certification Basics: The Gold Standard

July 13, 2017

2:00 – 3:00 pm ET

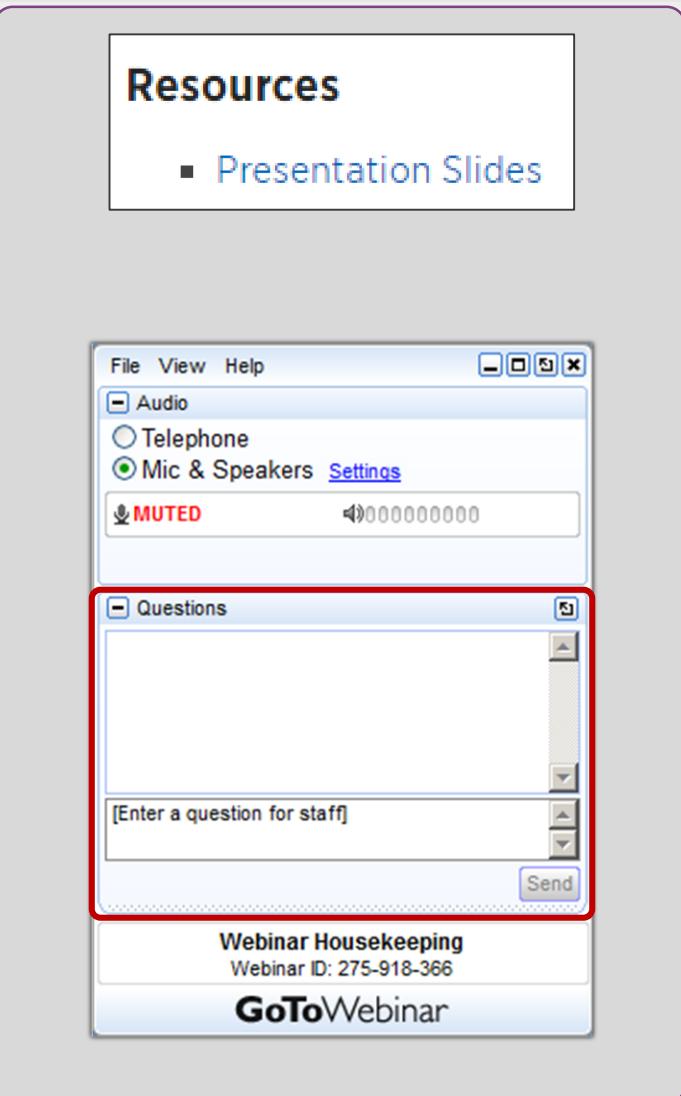
Logistics

Presentation Slides & How to Participate in Today's Session

Download the presentation slides at www.caqh.org/core/events.

- Click on the listing for today's event, then scroll to the bottom to find the Resources section for a PDF version of the presentation slides.
- Also, a copy of the slides and the webinar recording will be emailed to all attendees and registrants in the next 1-2 business days.

Questions can be submitted **at any time** with the **Questions panel** on the GoToWebinar dashboard.



Thank You Speakers!

CAQH CORE would like to thank our guest presenter for today's webinar.



Ashish Gandhi

Senior Technical Project Manager

Sergiu Rata

Senior Director of Product Management

Cristina Puscas

Senior Product Analyst, Smart Trading

Session Outline

- Voluntary CORE Certification – Why are so many in the industry becoming CORE-certified?
- CORE Certification Process & Resources.
- Edifecs Testing Portal.
- Dialog on Certification Challenges & Resources.
- Q&A.



Voluntary CORE Certification – Why are so many in the industry becoming CORE-certified?

Taha Anjarwalla
CAQH CORE Manager

Voluntary CORE Certification

Developed BY Industry, FOR Industry

CORE Certification is the most robust and widely-recognized industry program of its kind – the Gold Standard. Its approach assures an independent, industry-developed confirmation of conformance with operating rules and underlying standards.



Requirements are developed by broad, multi-stakeholder industry representation via transparent discussion and polling processes.



Required conformance testing is conducted by 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 and approves the Certification applications, e.g. trading partner dependencies, number of platforms, and conformance test reports before a Certification Seal is awarded.



CORE Certifications Phase I-IV

Entities Recognizing the Benefits Continues to Grow

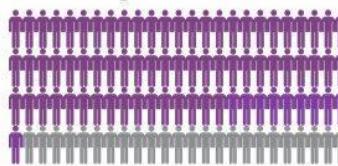
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**Certifications have been awarded
since the program's inception.**

Covered lives impacted by CORE-certified commercial and public health plans.

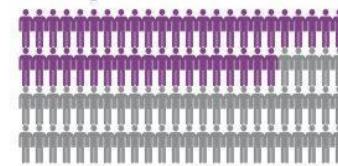
Commercially Insured

Seventy-Six Percent



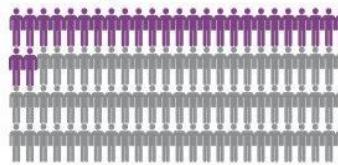
Publicly Insured

Forty-Four Percent



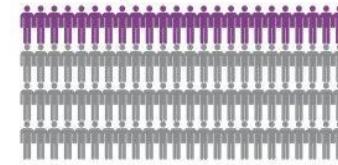
Phases I & II

Twenty-Seven Percent



Phase III

Twenty-Five Percent



Recent Certifications

Boston Medical Center HealthNet Plan (Phase I, II & III)



CalOptima (Phases I, II, & III)



National Association of Letter Carriers Health Plan (Phases I & II)



Government Employees Health Association (Phases I & II)



How Much Could the Industry Save?

2016 CAQH Index Reported Labor-only Savings Opportunity for Six HIPAA Transactions that have CAQH CORE Operating Rules; Adoption by Transaction is at Different Stages:

1. Eligibility and Benefit Verification (Phases I-II).
2. Claim Status Inquiry (Phase II).
3. Claim Payment (Phase III).
4. Remittance Advice (Phase III).
5. Claim Submission (Phase IV).
6. Referral Certification (Phase IV).



- Report used data from 5.4 billion transactions.
- These cost estimates only represent a fraction of the true industry savings opportunity associated with adoption of electronic transactions:
 - Includes direct labor cost for only *six* of the twelve key transactions in the claims cycle for commercial plans.
 - A more comprehensive estimate of industry cost savings opportunity would include indirect and direct cost for all twelve transactions in the claim cycle for *private and public payers*.

Other Cost Not Currently in CAQH Estimates

Six Additional HIPAA Transactions
Indirect Labor Cost (transaction prep & follow-up)
Vendor and Other Overhead
Public Payers
Host of Other Transactions Beyond HIPAA

Voluntary CORE Certification ROI

Electronic insurance eligibility verifications took approximately seven minutes less than telephone verifications, saving providers \$3.59 per verification. There are more than 1.5 billion claims verified for eligibility each year in the U.S.

Providers working with CORE-certified health plans saw 10-12% fewer claims denials, resulting in improved practice payment.

Electronic remittance advice adoption (55%) continues to steadily increase, but more than a third are still being sent via mail. Providers could save 12 minutes and \$4.74 per transaction by switching to ERA.

Providers who switched to electronic prior authorizations saved 14 minutes and \$5.61 per transaction.

Sources: CAQH Index 2016, IBM 2009

CORE Certification Testimonials



Health Plan

“For Aetna, becoming CORE Certified has been a priority. Completing certification Phases I, II and III helps us both push the industry forward and ensure that all of our business partners – especially healthcare providers – receive the benefits of the rules.”

-Lou Ursini, CAQH CORE Board Chair, Head, IT Program Delivery & Testing, Aetna

Provider

“As a provider-owned health plan, we have a unique understanding of how critical it is for data to flow seamlessly and securely between payers, hospitals and other partners. The CORE seal demonstrates to all of our partners our commitment to efficient data exchange and it enables us to identify partners that we can count on to do business efficiently, so we can focus on coordinating the care of our members.”

-Kim Sinclair, Chief Information Officer, Boston Medical Center Health Plan (part of the Boston Medical Center Health System)

Clearinghouse/ Vendor

“Operating rules and standards work best when everyone involved in a transaction adheres to them. By becoming CORE-certified, we are helping our clients meet – and exceed – an important regulatory mandate, while contributing to a more efficient healthcare system for everyone.”

-Cate McConnell, Director of Product Management, Payer Services, McKesson/Relay Health

Phase Certification & Tangible Benefit

Phase	Benefit
Phase I 	<ul style="list-style-type: none">Faster patient registration and improves revenue cycle management as providers are able to verify health plan coverage and will know the proper co-pay and deductible while the patient is present, not after the fact requiring follow-up.Real-time eligibility and benefit checks reduces claim denials, preventing patients from receiving unexpected bills and helping providers avoid taking on bad debt.
Phase II 	<ul style="list-style-type: none">Decreases duplicate claim submissions as claim status information is provided in real time, taking no longer than 20 seconds round-trip.Reduces misidentification of patients and mistaken denials by improving how patient names are stored and retrieved during eligibility checks.
Phase III 	<ul style="list-style-type: none">Improves cash flow via expedited payment and remittance reconciliation through the receipt of electronic payments and remittances.Eliminates the need for manual re-keying of reconciliations of EFTs and ERAs by requiring a trace number that links the two transactions so payments can be associated with service.Increases ability to conduct targeted payment issue follow-ups through uniform and maintained ERA codes (CARCs, RARCs, and CAGCs) to give the market consistency in reporting and interpreting the claim denials/adjustments.
Phase IV 	<ul style="list-style-type: none">Enhances revenue cycle management during healthcare claim submission as use of operating rules means providers will immediately learn if the claim submission was successfully received by the plan and moved into their adjudication system; providers are quickly made aware of obvious errors, so they can be corrected, reducing payment time.Reduces staff time on manual phone or fax inquiries for prior authorization requests as operating rules help inform whether a health plan has received and is reviewing a prior authorization request for a specific medical procedure or service.Alleviates delays or errors in processing employee change-of-life events through acknowledging the receipt of employee information between health plan and employer.

Benefit: Gold Standard

Industry-Driven Benefits

- Positions organizations as leaders in administrative efficiencies.
- Establishes conformance with federally mandated operating rules and underlying standards.
- Demonstrates ability to conduct secure, timely and streamlined electronic transactions.
- Ensures real-time access to eligibility information for beneficiaries.
- Lowers cost within claim processing systems.
- With measures taken to achieve CORE Certification through operating rule conformance, entities can prepare for potential external audits/penalties.

Multi-stakeholder Collaboration

- CAQH CORE is governed by a multi-stakeholder, executive-level board to address the interests of more than 130 participating organizations.
- The CORE Certification program was developed by CORE Participants representing health plans, providers, clearinghouses, vendors, government agencies and associations across the healthcare industry.
- Any organization that can create, transmit, or use healthcare administrative transactions can complete CORE Certification.



Health Plans



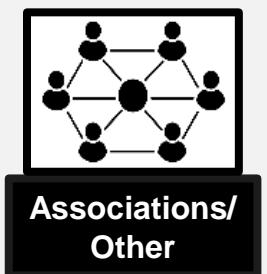
Clearinghouses



Government Agencies



Vendor Solutions



Associations/
Other

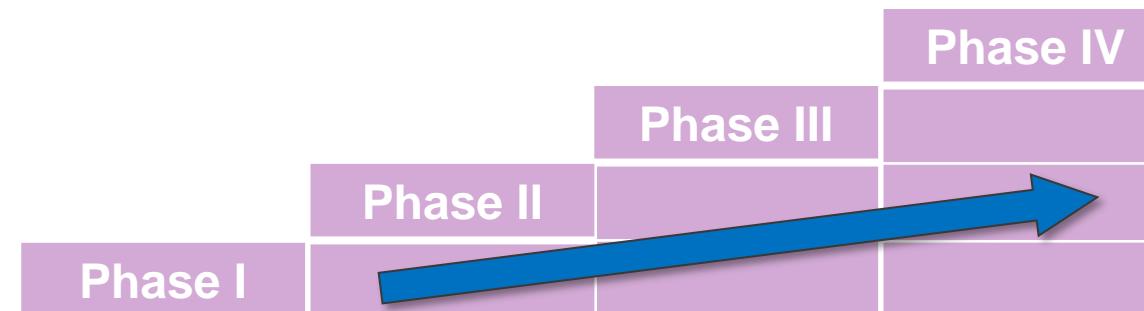


Providers

Benefit: Comprehensive Approach

Benefits of Pledging and Pursuing Each Phase of Certification

- By signing the CORE Certification Pledge, your organization has the potential to become a part of the collaborating effort for utilizing operating rules, standing out among other organizations.
- Through the CORE Certification program your organization can increase the usefulness of, and reduce the administrative challenges, associated with the infrastructure requirements/data content of electronic transactions.
- CORE Certification involves a phased approach, building off of a previous phase, providing an end-to-end testing suite that is both robust and comprehensive.
- For each phase, infrastructure requirements apply across transactions and include: Connectivity & Security, Response Time, System Availability, Exception Processing/Error Resolution, Roles & Responsibilities, Companion Guides, and Acknowledgements.



Benefit: Conformance

Compliance with Administrative Simplification requirements yields benefits to the healthcare industry.

Healthcare providers, health plans, payers, and other HIPAA-covered entities must comply with Administrative Simplification.

CMS, on behalf of HHS, has the authority to investigate complaints and audit for compliance with HIPAA standards, including authority with respect to the Administrative Simplification provisions of the:

- Health Insurance Portability and Accountability Act of 1996 ([HIPAA](#))
- Patient Protection and Affordable Care Act of 2010 ([ACA](#))

CORE Certification means an entity has demonstrated its IT system or product is operating in conformance with applicable requirements of a specific phase(s) of the CAQH CORE Operating Rules.



Benefit: Leadership

-  Establish your role as an industry leader as an adopter of the operating rules and underlying standards.
-  Publicly demonstrate commitment to administration simplification.
-  Build on implementation efforts and showcase that your organization adheres to federally mandated operating rules and standards.
-  Engage your trading partners and understand your contracting agreements to ensure optimal electronic data flows.

There is a substantial portion of the market that is already experiencing the efficiencies from the CAQH CORE Operating Rules – 76% of commercially insured and 44% of publicly insured are currently Phase I & II certified. **Don't get left behind!**



Benefit: Resources/Customer Service



Free Tools & Resources

There are numerous resources that can be accessed for free to ensure your CORE Certification success.

Website: www.CAQH.org/CORE



CORE Customer Service Promise

CORE staff are happy to set up a consultation to answer your questions and walk you through the CORE Certification process.

Email: CORE@CAQH.org

CAQH CORE Enforcement Policy

Ensuring Ongoing Compliance

CORE-certified entities adhere to not only the operating rules, but CORE Certification Policies, CORE Certification Testing requirements, and HIPAA Attestation Form requirements in order to become certified. As such, the CAQH CORE Enforcement Policy allows CAQH CORE to enforce ongoing compliance of operating rules and underlying standards for CORE-certified entities.

Who Benefits from CAQH CORE Enforcement?

- Empowers industry to ensure they are receiving and maximizing benefits afforded via CORE-certified entities; critical to providers and plans.
- Helps industry prepare for potential external audits/penalties.
- “By industry, for industry” approach demonstrates self-policing and self-reporting capabilities.
- No changes for CORE-certified entities.
- Multi-stakeholder approach allows end-to-end monitoring of conformance across trading partners.

CAQH CORE Enforcement Policy

- Applies to every type of entity that is CORE-certified, not just health plans.
- CORE Participant-approved policy to address non-compliance by CORE-certified entities.
- Any healthcare provider that is an end-user of a CORE-certified product/service/health plan or any CORE-certified entity may file a complaint against an alleged non-compliant CORE-certified entity.
- Complaint-driven and collaborative process that fosters industry collaboration through remediation, not penalties.
- If a CORE-certified entity is found to be in violation and the violation is not remedied per required timeline, the entity’s certification is terminated.



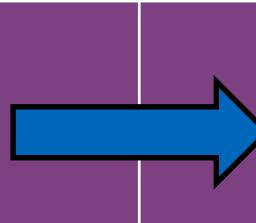
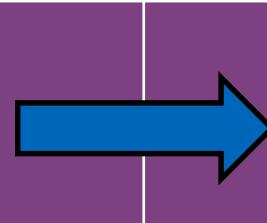
File a complaint: Is your CORE-certified trading partner non-compliant? Click [HERE](#) to start the complaint process by filling out the Non-Compliance Complaint Form to document instances of non-compliance.



Learn more: Have any questions or would like to learn more about the CAQH CORE Enforcement policy, contact core@caqh.org.

Highlights of CORE Certification

Pledge → Testing and Review → Voluntary Enforcement



- CORE Certification – the only program of its kind – was developed by industry, for industry with broad, multi-stakeholder representation.
- Ensures that organizations receive and maximize the benefits from the operating rules and underlying standards from CORE-certified trading partners on a continual basis.
- Commitment to CORE Certification formally kicks off with an executive signing the CORE Certification Pledge, which allows CORE to publicly share an entity's commitment to implementation in 180 days.
- Required CORE Certification testing is conducted by expert third party testing vendors, assuring an independent assessment of conformance with the operating rules and their underlying standards.
- CAQH CORE serves as a neutral, non-commercial administrator that reviews and approves the conformance test reports, and conducts additional, thorough examinations before awarding a Certification Seal.
- The CAQH CORE Enforcement Policy is a key element of CORE Certification. It reinforces that the CORE Seal represents **value, trust and achievement** in what can be a complex data exchange with multiple parties.
- It helps certified entities proactively work to avoid potentially costly external enforcement audits and penalties through supporting industry self-policing.

Polling Question #1

For what reason would your organization become CORE-certified? (Select all that apply.)

1. Demonstrates conformance with the operating rules.
2. Improves business processes leading to greater efficiencies for our customers (for example, requires real-time patient financials for providers).
3. Provides an objective assessment of our systems through the use of a third-party tester (CORE-authorized) and industry-supported certification organization (CAQH CORE).
4. All of the above.
5. Other: Please specify in Questions panel.



CORE Certification Process & Resources

Taha Anjarwalla
CAQH CORE Manager

Types of CORE Seals

- 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 Seals are categorized into four CORE Certification stakeholder types: **Providers, Health Plans, Clearinghouses, and Vendors**.
- In addition to stakeholder type, CORE Certification is specific to how an entity conducts a transaction as an **information source, information requester or both**.
- **Health Plans and Providers:** To become certified on a higher phase of CAQH CORE Operating Rules, these stakeholders must be CORE-certified on the earlier phases. Further, these stakeholders can leverage certifications from their vendors and clearinghouses to become CORE-certified themselves.
- **Vendors and Clearinghouses:** Given that vendors/clearinghouses offer products and services that may only address certain transactions, these stakeholders may become CORE-certified on only the relevant CAQH CORE Operating Rules phases.
- CORE Certification on specific phases of the CAQH CORE Operating Rules can be completed concurrently or successively.



CORE Certification's Four Component Process

<http://www.caqh.org/core/core-certification-process>



CORE Certification Process

CORE Certification: A Step-By-Step Process For Phases I-IV

NOTE: CORE Certification Testing on the Phase IV CAQH CORE Operating Rules is now open for public beta testing. Follow the link to access the Phase IV CORE Certification Test Site. Please contact [CORE@caqh.org](mailto:core@caqh.org) if your organization is interested in becoming an early adopter of this rule set.

Overview

Thank you for your interest in voluntary CORE Certification. CAQH CORE certifies and awards CORE Certification Seals to entities and products/services that create, transmit or use the administrative transactions addressed by the CAQH CORE Operating Rules. A CORE Certification Seal 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. Voluntary CORE Certification is available for providers, health plans, clearinghouses, and vendor products. See a list of organizations that are currently undergoing or have completed CORE Certification [HERE](#).

Are you an organization that wants to demonstrate its support for operating rules, but you do not create, transmit, or use administrative healthcare transactions? Find out how to become a CAQH CORE Endorser [HERE](#).

Voluntary CORE Certification on specific phases of the CAQH CORE Operating Rules can be completed concurrently or successively.

The CORE Certification process has four components:

1. Pre-certification Planning and Systems Evaluation
2. Signing and Submitting the CORE Pledge and Appropriate Phase II and Phase III Addenda
3. CORE Certification Testing
4. Applying for the CORE Seal

Each of the components has multiple steps which must be completed prior to moving on to the next component. The CORE documents required to complete each component step are indicated and accessible through the included links to the CAQH website.

Questions: Contact CAQH CORE at core@caqh.org.

Component 1
Pre-certification Planning & Systems Evaluation



Component 2
Sign and Submit CORE Pledge



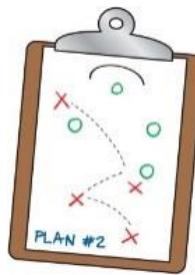
Component 3
CORE Certification Testing



Component 4
Apply for CORE Certification Seal

1: Pre-certification Planning and Systems Evaluation

Component 1 Pre-certification Planning & Systems Evaluation



Understand requirements of the CAQH CORE Operating Rules and scope your internal efforts to adopt and implement the operating rules

Component 1: Pre-certification Planning and Systems Evaluation

Gauge your organization's ability to adopt and become compliant with the CORE Operating Rules by identifying systems/software and business process gaps. The following documents will help you create a project plan to eliminate any gaps found between CAQH CORE rule requirements and your organization's current capabilities. All gaps should be closed prior to the start of CORE certification testing. Additionally, consider requesting a call with CAQH CORE Staff, who can provide guidance to help with your remediation project.

Name of Document	Description	Phase I	Phase II	Phase III	Phase IV
CAQH CORE Operating Rules and Policies	Lists and explains the phase-specific operating rules, and the policies regarding Certification and Certification testing.	Version 1.1.0	Version 2.1.0	Version 3.0.0	Version 4.0.0
CAQH CORE Analysis and Planning Guides	Help entities identify system/software gaps and create a project plan to complete any necessary system remediation.	Phase I & II Analysis & Planning Guide		Phase III Analysis & Planning Guide	Phase IV Analysis & Planning Guide
CAQH CORE Master Test Suites	Phase-specific documents that specify the test scripts that must be met in Certification Testing	Version 1.1.0	Version 2.1.0	Version 3.0.0	Version 4.0.0
Master Test Bed Data	Dummy data that must be used in Certification Testing	Version 1.2.0	Version 2.2.0	Not Applicable	Not Applicable
CAQH CORE FAQs	Frequently asked questions and answers serve as helpful resources to organizations, aiding to answer both general and technical questions about CORE Certification and CAQH CORE Operating Rules	FAQS			

2: Sign and Submit the CORE Pledge

Component 2 Sign and Submit CORE Pledge



Formally communicate your intent to pursue
CORE Certification for a given phase of CAQH
CORE Operating Rules

Component 2: Sign and Submit the CORE Pledge

1. Sign and submit the CORE Pledge: The first form to submit is the CORE Pledge. The CORE Pledge must be signed by an authorized executive level employee.
2. Submit the signed CORE Pledge for each of the CAQH CORE Operating Rule Phases that you are pursuing through via online through the [CORE Certification Application Portal](#) or send to CAQH via email, fax, or mail.

CAQH CORE™ PLEDGE PHASE IV ADDENDUM

This addendum to the CAQH CORE Pledge supplements the CAQH CORE Pledge (the "Pledge") signed by CAQH and Participant, and extends Participant's support of the Committee on Operating Rules for Information Exchange ("CORE") to CORE Phase IV. In particular, CAQH has promulgated Phase IV of CORE ("Phase IV CORE") to add operating rules to support v5010 of the ASC X12N 005010X222 Health Care Claims (837) Professional, ASC X12N 005010X233 Health Care Claim (837) Institutional, ASC X12N 005010X224 Health Care Claim (837) Dental, ASC X12N 005010X217 Health Care Services Review – Request for Review and Response (778), ASC X12N 005010X220 Benefit and Enrollment Maintenance (834), and ASC X12N 005010X218 Payroll Deducted and Other Group Premium Payment for Insurance Products (820) transactions. Participant hereby extends its support of CAQH CORE in the Pledge to include support of Phase IV. Subject to the extension to Phase IV as set forth in this addendum, the provisions of the Pledge shall continue to apply to Phase I, Phase II, and Phase III CORE without change.

Accepted:

Participant:

By:

Name:

Title:

Date:

Acknowledged:

Council for Affordable Quality Healthcare
on behalf of CORE

By:

Robin J. Thomashauer

Executive Director

After signing this document (and ensuring your organization will be able to successfully complete CORE Certification Testing in 180 days if you are seeking CORE Certification), please submit to:

CORE
c/o CAQH
1900 K Street, NW
Suite 650
Washington, DC 20006

E: CORE@caqh.org
F: 202-517-0397

3: CORE Certification Testing

Component 3 CORE Certification Testing



An entity seeking CORE Certification works with a CORE-authorized testing vendor to perform tests based upon CORE Phase I-IV testing criteria specific to that entity's stakeholder type.

Component 3: CORE Certification Testing

Voluntary CORE Certification requires successful Certification Testing by a third-party CAQH CORE-authorized Testing Vendor. CAQH CORE-authorized Testing Vendors are chosen to conduct CORE Certification Testing for all of the CAQH CORE Operating Rules after a rigorous selection and approval process by CAQH CORE.

Edifecs is currently the only CAQH CORE-authorized Testing Vendor; however, any organization that meets the requirements and completes review and approval by CAQH CORE is eligible to become a CAQH CORE-authorized testing vendor. More information on the process and requirements for entities to become a CAQH CORE-authorized Testing Vendor is available via the How to Become a CAQH CORE-authorized Testing Vendor Fact Sheet [HERE](#).

Steps for Voluntary CORE Certification Testing:

1. Register with Edifecs, a CAQH CORE-authorized Testing Vendor, on the appropriate landing page below. You must register separately for [Phases I/II](#), [Phase III](#) and [Phase IV](#). Note: The Phase IV CORE Certification Test is open for public beta testing.
2. Complete CORE Certification Testing within the 180-day pledge window.
3. Contact the CAQH CORE-authorized Testing Vendor with any questions or concerns related to any part of the CORE Certification Testing process.
4. Upon successful completion of the CORE Certification Testing, the CAQH CORE-authorized Testing Vendor will provide you with documentation that demonstrates the successful completion of your organization's CORE Certification Testing. The CAQH CORE-authorized Testing Vendor will also provide a copy of your organization's CORE Certification Testing to CAQH CORE.

4: Applying for the CORE Seal

Component 4 Apply for CORE Certification Seal



Complete and submit a CORE Seal Application Form, CORE HIPAA Attestation Form, and CORE Seal Fee.

Component 4: Applying For the CORE Seal

After successful completion of CORE Certification Testing, your next step is to apply for the CORE Certification Seal. Applying for the CORE Certification Seal requires you to notify CAQH CORE that certification testing is complete and to submit a CAQH CORE Seal Application, a CAQH CORE HIPAA Attestation, and CAQH CORE Certification Fee for each Phase(s) of the CAQH CORE Operating Rules you are seeking to become CORE-certified.

1. Notify CAQH CORE that CORE Certification Testing with the CAQH CORE-authorized Testing Vendor has been completed.
2. Submit the CAQH CORE HIPAA Attestation and the CAQH CORE Seal Application for each Phase that you are pursuing via the [CORE Certification Application Portal](#), email (CORE@caqh.org), fax (202) 517-0397, or mail:

CORE, c/o CAQH
1900 K Street, NW
Suite 650
Washington, DC 20006

Your organization may download and/or print the forms via the following links:

CAQH CORE HIPAA Attestation: [Phase I](#), [Phase II](#), [Phase III](#), or [Phase IV](#)
CAQH CORE Seal Application: [Phase I](#), [Phase II](#), [Phase III](#), or [Phase IV](#)
3. Determine your CORE Seal fee by reviewing the fee scale below or on the CORE Seal Application form ([Phase I](#), [Phase II](#), [Phase III](#), or [Phase IV](#)).
4. Upon receiving the CAQH CORE HIPAA Attestation and the CAQH CORE Seal Application, CAQH CORE conducts a robust, multi-level review of the application materials and the Certification Testing results. CAQH CORE will have a maximum of 20 business days to complete its assessment of the application and respond to the applicant with a clear response of approval or need for clarification.
5. A final decision about the CAQH CORE Seal Application is made by CAQH CORE within 30 business days of receiving a complete application, unless there are extenuating circumstances. If so, CAQH CORE will notify the applicant about the reason for an extension to the review.
6. After receiving a CORE Certification Seal:
 - The certified entity may market itself as being CORE-certified.
 - CAQH CORE will report on its website:
 - CORE-certified entities and endorser
 - The number of CORE Pledges it has received by stakeholder type

CORE SEAL FEE* SCALE

Health Plans

Below \$75 million in net annual revenue:	\$4,000 fee
\$75 million and above in net annual revenue:	\$6,000 fee

Clearinghouses

Below \$75 million in net annual revenue:	\$4,000 fee
EHNAC HNAP-EHN accredited	- apply 10% (\$400) discount
\$75 million and above in net annual revenue:	\$6,000 fee
EHNAC HNAP-EHN accredited	- apply 10% (\$600) discount

Vendors

Below \$75 million in net annual revenue:	\$4,000 fee
\$75 million and above in net annual revenue:	\$6,000 fee

Providers

Up to \$1 billion in net annual revenue:	\$500 fee
\$1 billion and above in net annual revenue:	\$1,500 fee

Federal or State Government Entities No Fee

*Fees are a one-time cost for each Phase of certification

Voluntary CORE Certification: Resources

- [CAQH CORE Analysis and Planning Guides](#): Identifies system/software gaps and helps create a project plan to complete any necessary system remediation.
- [CAQH CORE Certification Test Suites](#) & [CAQH CORE Master Test Bed Data](#): Identifies stakeholder-specific conformance testing requirements of the CAQH CORE Operating Rules for voluntary CAQH CORE Certification.
- CAQH CORE staff support via phone (202.517.0375) and email (CORE@CAQH.org).
- Free resources from Edifecs, CORE-authorized Testing Vendor (Info.CoreCertification@edifecs.com).
- [CAQH CORE FAQs](#): Addresses questions pertaining to technical rule requirements and stakeholder specific implementation on the CAQH CORE Operating Rules.
- [e-Learning Tools](#): Provides interactive dashboards and modules to learn about Voluntary CORE Certification.



Polling Question #2

What stage of certification is your organization currently in? (Select all that apply.)

1. Information gathering.
2. Organizational buy-in.
3. System remediation.
4. Resource allocation and project planning.
5. Pursuing CORE Certification (signed CORE Certification Pledge)/Already CORE-certified.

Polling Question #3

What resources/tools were or would be most beneficial to your certification planning? (Select all that apply.)

1. Analysis & Planning Guide.
2. Consultation.
3. E-Learning Modules.
4. Decision-making Templates.
5. Other: Please specify in Questions panel.



Value of Certification beyond Conformance Testing

Sergiu Rata
Senior Director, Product Marketing

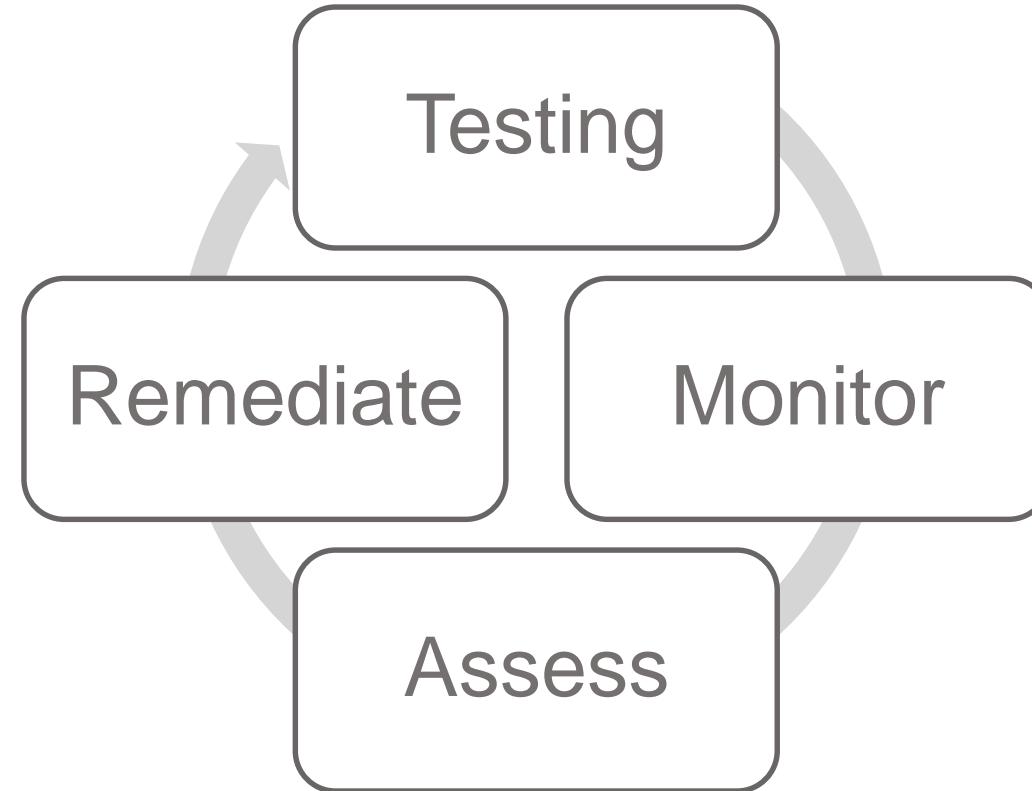
Top 5 Value Points

Natural Progression	Partner Communication	Competitive Advantage	Claim Response Standardization	Cost Influencer
CORE Phase IV is an easy continuation of II and III framework with one standard protocol for transmission with a uniform claims submission process.	Provide a superior service, more transparency, and smoother go-live onboarding to the partner community (with defined test cases and detailed responses).	Positive impact on membership, ease of provider network management, and assist with rate negotiations. More predictable b/c of rules-driven SLAs.	Improve the secondary functions with better error reporting and business edits. Remove complexity of proprietary reporting on providers which has impact to the business bottom line.	Reduce administrative costs for payers. Reduced phone support calls drives down clearinghouse costs with CORE compliant interactions.



Simplified Framework

Starting with a FREE
Edifecs CORE OR
Certification Testing
Website.



Automation and business
rules should be applied to
connectivity and
transaction workflows.

Stakeholders should have
surveillance and monitoring
mechanism to track SLAs
according to Operating Rules.

Insights from monitoring
will provide data to
perform assessments or
gap-fits analysis.

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Test

Start here.

<http://www.edifecs.com/login>

Start by selecting the Client Login button under the CORE Phase I/II/III/IV:

- **Free testing service based on CORE approved test suites.**
- Dedicated web portal available 24/7.
- Online and live support for quick issue resolution.



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Client Login



CORE Phase I/II/III/IV

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.

[CORE Login](#)



Compliance Online

Edifecs Compliance Online is a subscription-based service for HIPAA testing & certification. It provides services for healthcare professionals working towards implementing transaction-based interoperability solutions using healthcare transaction standards.

[Compliance Login](#)



Commerce Desk Login

Edifecs CommerceDesk Online is a subscription-based industry resource site for integration/middleware professionals to get access to EDI standards based information, testing services and lot more.

[Commerce Desk](#)



ServiceDesk

Edifecs ServiceDesk is a self-service customer support portal for our customers. ServiceDesk provides access to resources, product information and updates, online visibility to their support issues and a lot of other useful technical support information.

[ServiceDesk Login](#)



Test

Welcome test account [Manage](#)

test health plan [Manage](#)

[Logoff](#)

edifecs | CORE

[Home](#) [Programs](#)

[Start](#)

[About Edifecs](#)

Welcome to the Edifecs CAQH-CORE Testing Portal

Congratulations! You have successfully enrolled into the Edifecs CORE testing system and are ready to begin Phase IV certification testing. Edifecs is proud to have been selected by CAQH as an approved certification vendor and is offering this certification testing portal at no charge to you.

In preparation for testing please make sure that you have reviewed the [CAQH Step-by-step CORE Certification Process](#) and [Phase IV Rules](#) information. This webpage will provide you with links to the necessary documents to complete the initial steps of CORE certification, as well as provide you a step-by-step review of the certification process. Please note that the primary document to begin the certification process is the [CORE Pledge](#). You can begin testing without having signed the Pledge, but the Pledge must be signed and submitted prior to applying for the CORE seal. Also note that once you have signed the Pledge you will have 180 business days to complete the certification testing required for your Stakeholder type. To begin testing please follow the simple outlined steps below.

- 1 Download and Review the CORE Testing Quick Start Guide.**
- 2 Determine the transactions for which you would be performing the testing to be CORE certified. Select appropriate test suite and options from the test cases to perform the testing**
- 3 Make certain that you have the required connectivity resources available.**

Please check with your internal IT team if you have questions regarding these requirements or your organization's ability to meet them. Before you begin testing, please be sure you have the resources to formulate the posts and communications required during the process. Edifecs experts will be available to answer any questions related to testing. However, Edifecs experts will not be available to solve any connectivity issues. Questions related to connectivity and your internal capabilities should be directed to your internal IT staff.

- 4 Click on the "Programs" tab at the top to access the testing programs that you have been enrolled in for CORE testing.**

Powered by: **edifecs**

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Edifecs Solutions

Healthcare Solutions

Products

Compliance Online

Resources

Test

This Guide is to be used in connection with Edifecs CORE Phase IV 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.

edifecs CAQH CORE Users – Phase IV Quick Start

CAQH Committee on Operating Rules for Information Exchange (CORE)

User Quick Start Guide
For the
Edifecs Phase IV CAQH CORE Voluntary Certification Testing System



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Test & Certify

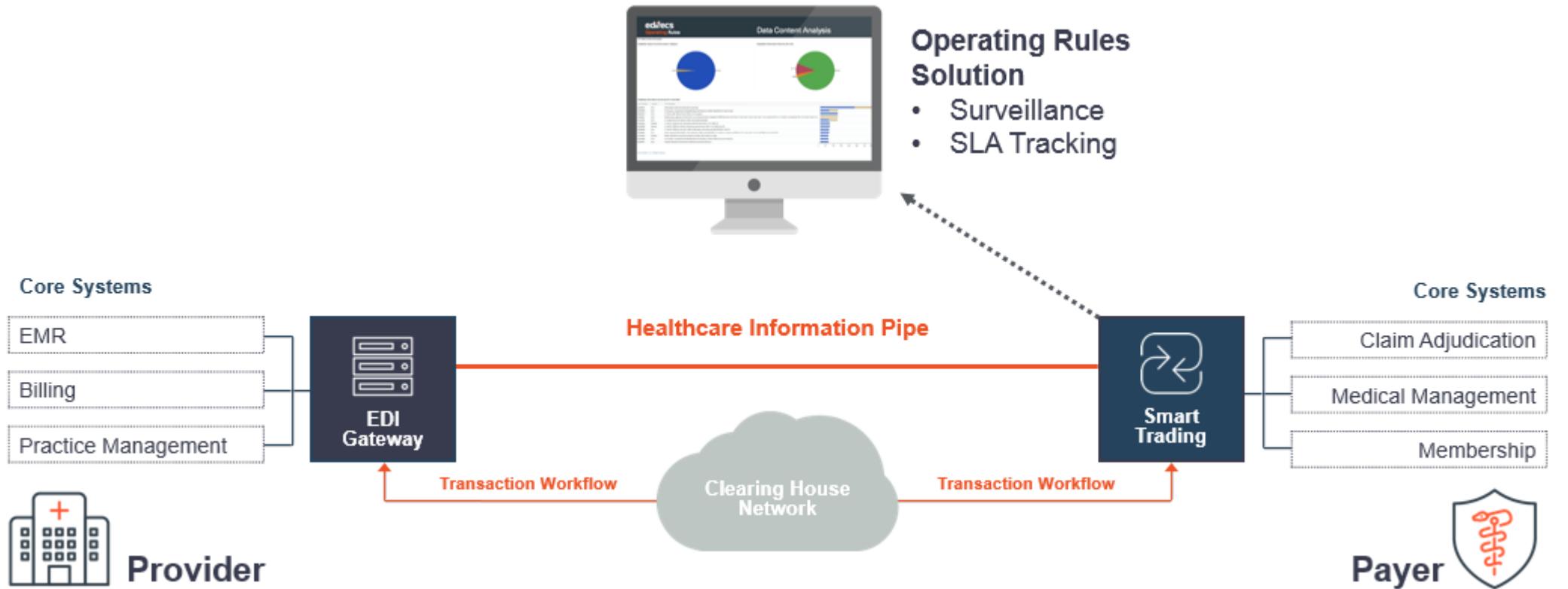
The screenshot shows the edifecs CORE Test Suite interface. At the top, there's a navigation bar with links for Home, Programs, and the current page, "Test Suite for Healt...". Below the navigation is a sidebar with links for Start, Testing Steps, FAQs, Edifecs Support, Add Issue, and Edifecs Products. The main content area has three sections: "Description" which contains a truncated task description; "Activity" which shows a target date set to "Now" and a deadline of "08/23/2016"; and "Tasks (Incomplete)" which lists several required tasks, each with a link to its details. A note at the bottom of the tasks section says, "There are 4 'Required' tasks that must still be completed." The footer indicates the system is "Powered by edifecs".

There is a list of testing tasks corresponding to the program you are testing for.

This task requires the testing entity to provide the required documentation/supporting artefacts required by the CORE rules.

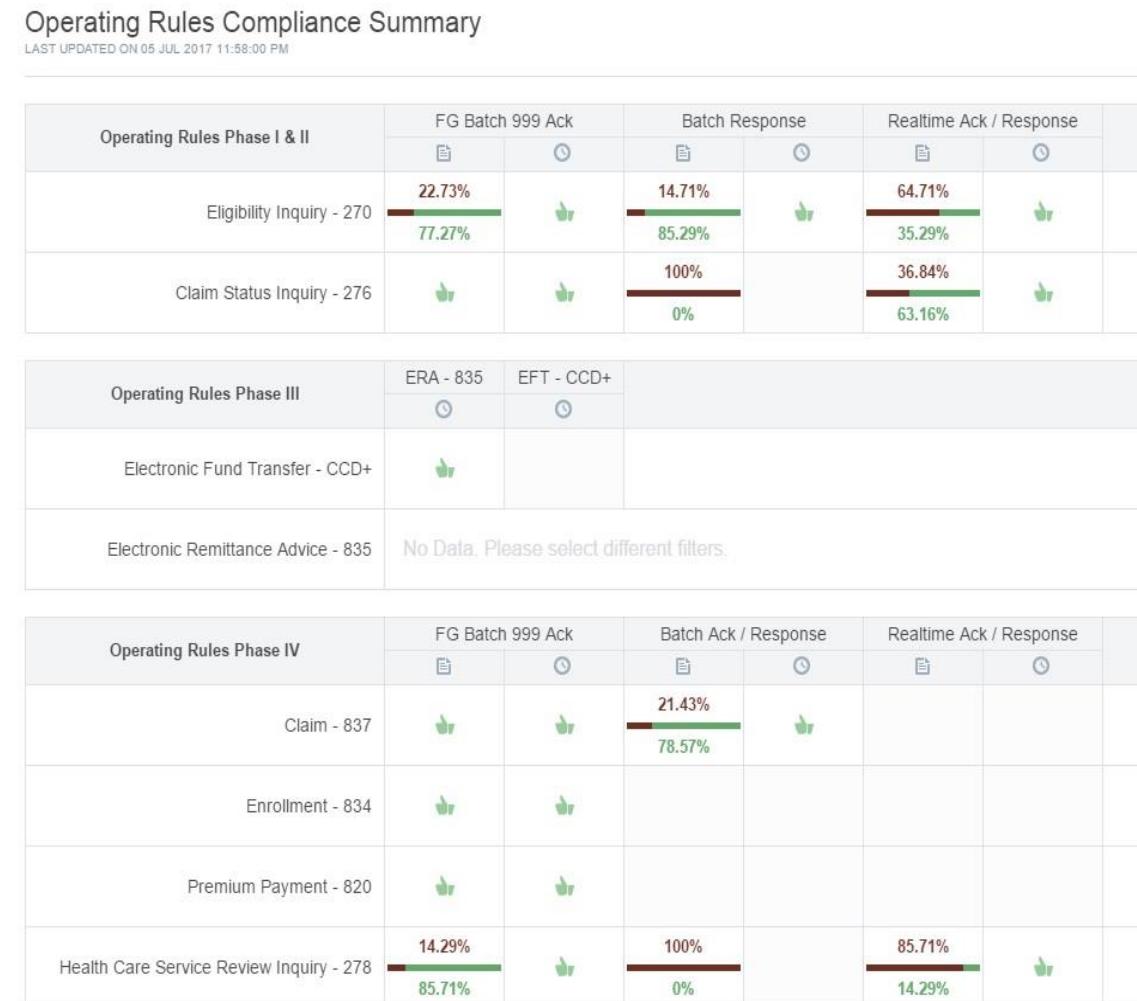
The screenshot shows a specific task within the edifecs CORE Test Suite. The title of the task is "#4a Upload the Table of Contents from Stakeholder's 837 (I) Companion Guide (Rule 450, Test Suite Test #9)". The task is marked as "Required". The instructions state: "This task is designed to allow CORE Stakeholders to upload a screen shot or other electronic copy/image of the Table of Contents of the Stakeholder's 837 (I) Companion Guide. Once uploaded Edifecs support will verify that the uploaded document meets the CORE testing criteria. Once verified the task will be marked as 'Completed.'". Below the instructions, it says "To complete this task please do the following:" followed by a numbered list of steps. Step 1: Use the "Add New Attachment" function to browse and select the tester's screenshot or document. Step 2: Select the "Partner Steps Complete" radio button. Step 3: Click the "Save and Close" button. A note below says, "By completing this task you are completing CAQH CORE Rule 450: Companion Guide, Test Suite Test #9 in the Phase IV CAQH CORE Voluntary Certification Test Suite". The task has an "Attachment" section where users can add new attachments, and a "Mark as Completed" section where they can update their status. The footer indicates the system is "Powered by edifecs".

Monitor



Monitor

- Ongoing surveillance to track Operating Rule compliance.
- Track responses/acknowledgements and their timeliness.
- Track eligibility data content errors and AAA errors.
- Track ERA and EFT re-association, and CARC/RARC errors.
- Report the errors and statistics in dashboards.



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Assess

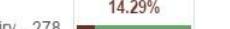
- CORE readiness assessment should include analyzing end-to-end data flow, data content, processing, and compliance for CORE Phase I, II, III and IV rules.
- Perform fit-gap analysis for impact business function areas.
- Perform systems analysis and planning for implementation.
- Prepare a high level roadmap capturing the operational technical strategy that aligns with organizational objectives.

Operating Rules Compliance Summary

LAST UPDATED ON 05 JUL 2017 11:58:00 PM

Operating Rules Phase I & II	FG Batch 999 Ack
Eligibility Inquiry - 270	 22.73%  77.27%
Claim Status Inquiry - 276	 

Operating Rules Phase III	ERA - 835	EFT - CCD+
Electronic Fund Transfer - CCD+		
Electronic Remittance Advice - 835	No Data. Please select dif	

Operating Rules Phase IV	FG Batch 999 Ack
Claim - 837	 
Enrollment - 834	 
Premium Payment - 820	 
Health Care Service Review Inquiry - 278	 14.29%  85.71%

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Remediate

- Conduct validations of partner transactions.
- Perform HIPAA and CORE validations of transactions.
- Follow CORE-compliant connectivity protocols and authentication.
- Streamline claim responses and status/inquiries.

Operating Rules Compliance Summary

LAST UPDATED ON 05 JUL 2017 11:58:00 PM

Operating Rules Phase I & II	FG Batch 999 Ack	
Eligibility Inquiry - 270	22.73% 	
Claim Status Inquiry - 276	77.27%	

Operating Rules Phase III	ERA - 835	EFT - CCD+
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Electronic Remittance Advice - 835	No Data. Please select dif	

Operating Rules Phase IV	FG Batch 999 Ack	
Claim - 837		
Enrollment - 834		
Premium Payment - 820		
Health Care Service Review Inquiry - 278	14.29% 	

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Dialog on Certification Challenges & Resources

Taha Anjarwalla
CAQH CORE Manager

Ashish Gandhi
Senior Technical Project Manger

Sergiu Rata
Senior Director of Product
Management

Cristina Puscas
Senior Product Analyst, Smart Trading

Moderator: Jessica Porras
Senior Manager

Top 5 Challenges

Technical	Stakeholder Identification	Application Process	Trading Partner Alignment	Resource Allocation
<ul style="list-style-type: none">Internal SystemsSetting Up Connectivity	<ul style="list-style-type: none">Getting the right person(s) involved.	<ul style="list-style-type: none">Understanding rules or policies.Limited time to implement and test.Maintaining and monitoring compliance.	<ul style="list-style-type: none">Transparency and ease of data exchange.	<ul style="list-style-type: none">Staff, budget, prioritization, leadership, and time.Creating master test data.Mitigating resource constraints for testing.

The process can be confusing and roadblocks with systems are common. Having helped many organizations get CORE-certified and as a trusted CAQH CORE partner, we fully understand the concerns and challenges of testing.



Edifecs Testing Tips

1. Ensure that you have gone through the CAQH CORE operating rules of the respective phases as listed on the CAQH CORE site (<https://www.caqh.org/core/caqh-core-phase-iv-operating-rules>) and that your system have adapted to implement those rules.
2. Before starting with a testing task, read the testing instructions provided for the task carefully. Perform the task according to the instructions and the corresponding operating rule.
3. For the connectivity related task it is recommended that, before coming to the portal, you should try to hit your web service through a third party tool (example, SoapUI for testing through soap) as a first step. If you are successfully able to do so and are getting the required results, test the same on the portal.
4. While performing your task you must take care that the test file you are using does not have data errors, as this would result in failure of the test case.

Polling Question #4

What are the biggest obstacles to pursuing CORE Certification? (Select all that apply.)

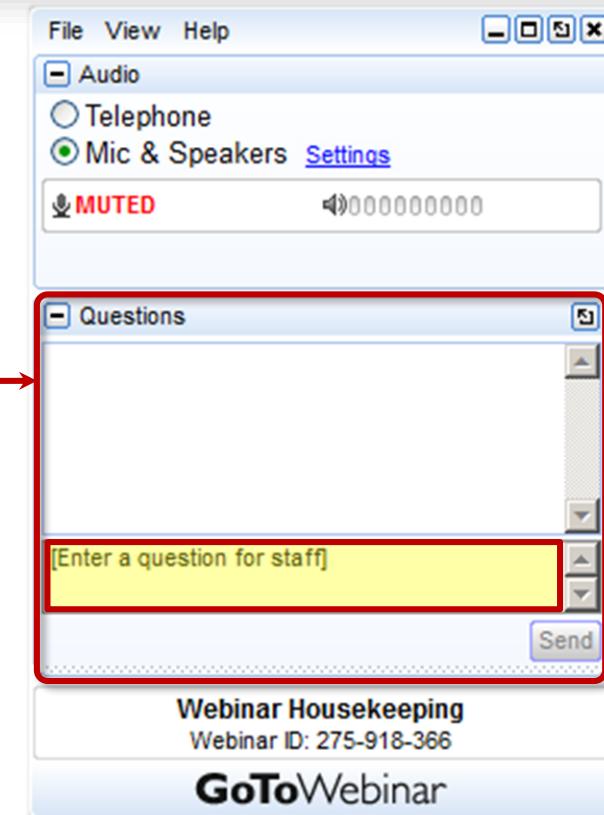
1. Resource allocation.
2. Leadership/executive buy-in.
3. Vendor/contractor not certified.
4. Understanding the requirements.
5. Other: Please specify in Questions panel.

Audience Q&A

Please submit your questions

Enter your question into the “Questions” pane in the lower right hand corner of your screen.

You can also submit questions at any time to CORE@caqh.org



Download a copy of today's presentation slides at caqh.org/core/events

- Navigate to the Resources section for today's event to find a PDF version of today's presentation slides
- Also, a copy of the slides and the webinar recording will be emailed to all attendees and registrants in the next 1-2 business days

Resources
▪ [Presentation Slides](#)

Upcoming CAQH CORE Education Sessions

**2016 CAQH Index: Tracking Industry Trends and Cost Savings in Use of
Electronic Healthcare Business Transaction**
WEDNESDAY, JULY 19TH, 2017 – 2 PM ET

**CAQH CORE Participant Call on Approach to Adoption of Electronic
Prior Authorization Transactions**
THURSDAY, JULY 27TH, 2017 – 2 PM ET

THIS CALL IS ONLY OPEN TO CAQH CORE PARTICIPATING ORGANIZATIONS

**Save Time and Money! CAQH CORE and OrboGraph Discuss Value of
Implementing the Phase III CAQH CORE Operating Rules**
THURSDAY, AUGUST 31ST, 2017 – 2 PM ET

To register for these, and all CORE events, please go to www.caqh.org/core/events

Thank you for joining us!



@CAQH

Website: www.CAQH.org/CORE

Email: CORE@CAQH.org

The CAQH CORE Mission

Drive the creation and adoption of healthcare operating rules that support standards, accelerate interoperability, and align administrative and clinical activities among providers, payers and consumers.