

CAQH CORE - Quick Start Guide

for the Edifecs CORE Certification

– Partner Portal



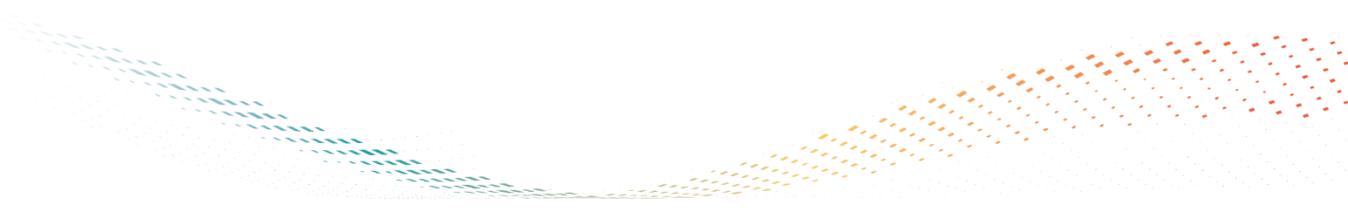
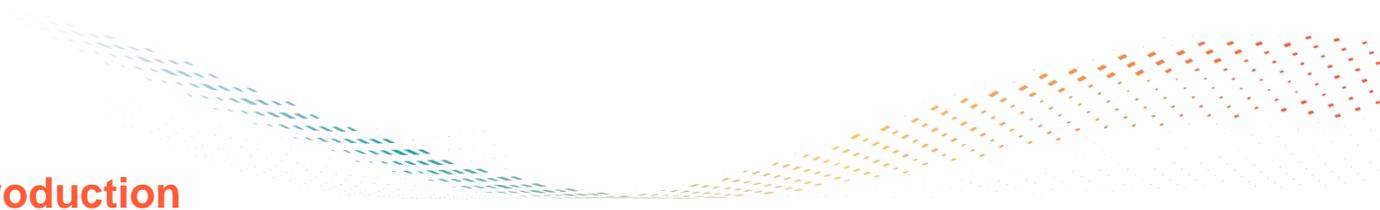


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Introduction

This guide is for the following Edifecs CORE certifications:

- Eligibility and Benefits (270/271)
- Claim Status (276/277)
- Payment and Remittance (835)
- Prior Authorization & Referrals (278)
- Health Care Claims (837-Institutional/Professional/Dental)
- Benefit Enrollment (834)
- Premium Payment (820)

Note: *The guide contains instructions on the design and general utility of Onboarding and Testing Cloud Service and is not a step-by-step guide to obtain a CORE certification.*

Section 1: CORE Self-Registration Walkthrough

As a CORE Shareholder, before you begin with CORE certification testing with Onboarding and Testing Cloud Service, you should perform the following steps:

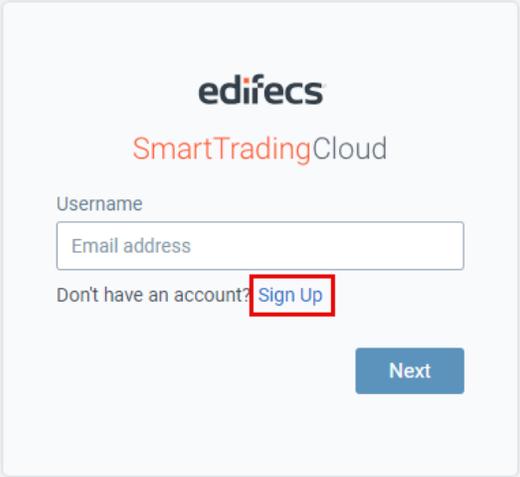
1. Go to the [CAQH CORE website \(Partner Portal\)](#) and review the CORE Rules, CORE Pledge, HIPAA attestation form, and the CORE Certification Seal Application (or Recertification Seal Application).
2. Go through the CORE Certification Step-By-Step process available on [CAQH CORE – Committee on Operating Rules for Information Exchange](#).
3. Sign and submit the CORE Pledge (CORE Recertification Seal Application Form if Recertifying).
Note: *This step is not required to begin testing but is mandatory to receive certification. For more information, see the section [CORE Pledge Date](#).*
4. Connect with the local network resources that can assist you in the testing. This includes your IT team that can help you establishing communications.
Note: *For more information, see the section [Where do I go for Connectivity Information](#).*

After you have completed the above-mentioned steps, you can begin Edifecs CORE Certification Testing. Edifecs supports the initiative of CORE and provides certification testing services free of charge to CORE stakeholders.

Section 1.1: Set up Account on Partner Portal

To create an account on Onboarding and Testing Cloud Service:

1. Go to the partner portal and click **Sign Up** on the login form.



edifecs
SmartTradingCloud

Username
Email address

Don't have an account? [Sign Up](#)

Next

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Note: *Onboarding and Testing Cloud Service is a subset of Edifecs product Smart Trading Cloud whose name is displayed across all the sign up/login forms and prompts.*

2. Provide your organization email address, check the agreement checkbox, and then click **Next**.

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Create Account

Email Address*
your.name@organization.com

I agree to the Edifecs Terms of Services and Privacy Policy

Next

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3. If your organization is not registered, Onboarding and Testing Cloud Service prompts a message on the next screen that your organization is not registered and as the first user of your organization, you automatically become an administrator of your organization. Click **Continue to Sign Up**.

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SmartTradingCloud
Your organization is not yet registered

Sign up your organization
You will be registered as an Organization Administrator

Back Continue to Sign Up

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4. On the next screen, provide the following information about your organization and then click **Next**:
- **Organization Type:** Select '**Organization Type**' from the dropdown list.
 - **Organization Name:** Enter the name of your organization.
 - **Address:** Provide the complete address and contact information in respective fields.

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Organization Registration

Organization Details

Organization Type*
Provider

Organization Name*
Your Organization Name...

Country: USA State: Alabama

Street Address 1: Street Address 2:

City: ZIP:

Phone: Fax:

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Note: Once you select **Organization Type** in the field **Organization Type**, the **Organization Details** form starts displaying additional details, through which you can simply select the remaining fields such as your organization name, address and contact information.

5. On the next screen, provide the following information for the organization administrator account and then click **Next**:
- **Name:** Enter your first name and last name.
 - **Email:** This field is prefilled from the value you provided in Step 2.
 - **Password:** Provide and confirm password for the administrator account.
 - **Primary Contact:** Provide the first name and last name of the person whom you want to specify as the primary point of contact for your organization.

- **Primary Contact Email:** Provide the email address of your organization's primary contact.

The screenshot shows the 'Organization Registration' page for Edifecs SmartTradingCloud. The page is titled 'Organization Registration' and contains two main sections: 'Organization Account Administrator' and 'Primary Contact'. Each section has fields for 'First Name*', 'Last Name*', and 'Email Address*'. The 'Password*' and 'Confirm Password*' fields are also present. The 'Back' and 'Next' buttons are located at the bottom of the form. The footer includes 'Powered by Edifecs' and links for 'Help', 'Terms', and 'Privacy Policy'.

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SmartTradingCloud
Organization Registration

Organization Account Administrator

First Name* Last Name*
John Doe

Email Address
your.name@organization.com

Password* Confirm Password*
.....

Primary Contact

First Name* Last Name*
John Doe

Email Address*
your.name@organization.com

Back Next

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6. On the next screen, review all the information you have provided and click **Confirm** if the information is correct. Otherwise, click **Back** to go back to the previous form and edit the information.

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SmartTradingCloud

Organization Registration

Organization Information

Name	Your Organization Name...		
Organization Type	Provider	NPI Number	-
Street Address 1	-	Street Address 2	-
City	-	State	Alabama
ZIP	-	Country	USA
Phone	-	Fax	-

Organization Account Administrator

First Name	John	Last Name	Doe
Email Address	your.name@organi...		

Primary Contact

First Name	John	Last Name	Doe
Email Address	your.name@organi...		

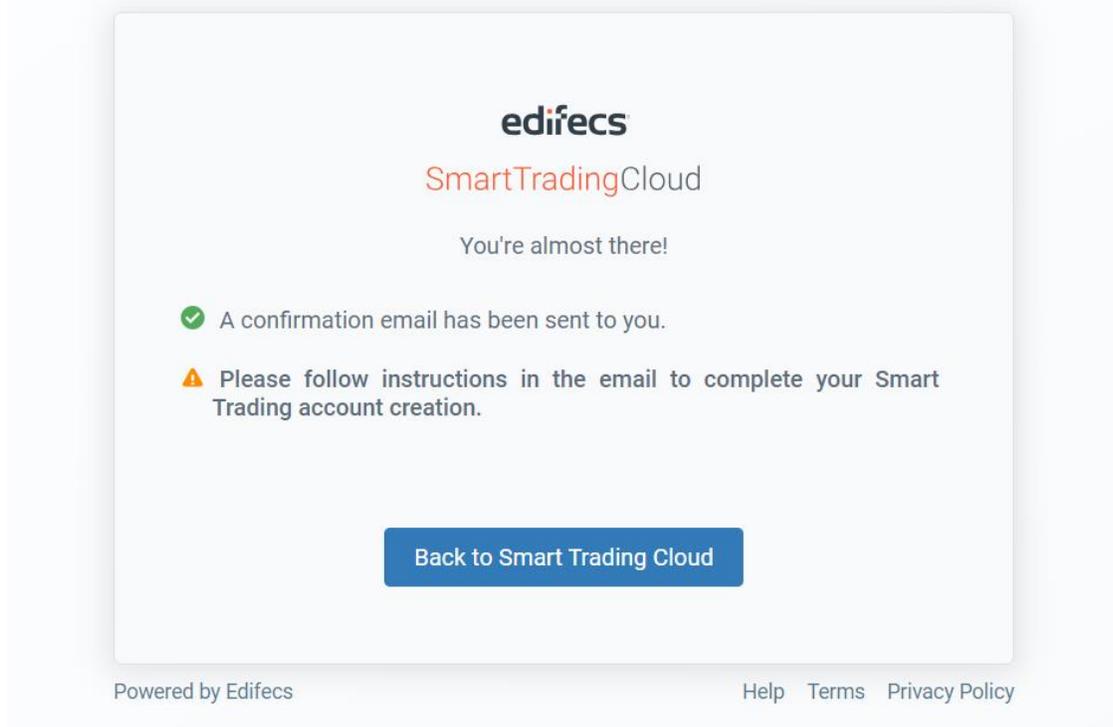
Back

Confirm

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[Help](#) [Terms](#) [Privacy Policy](#)

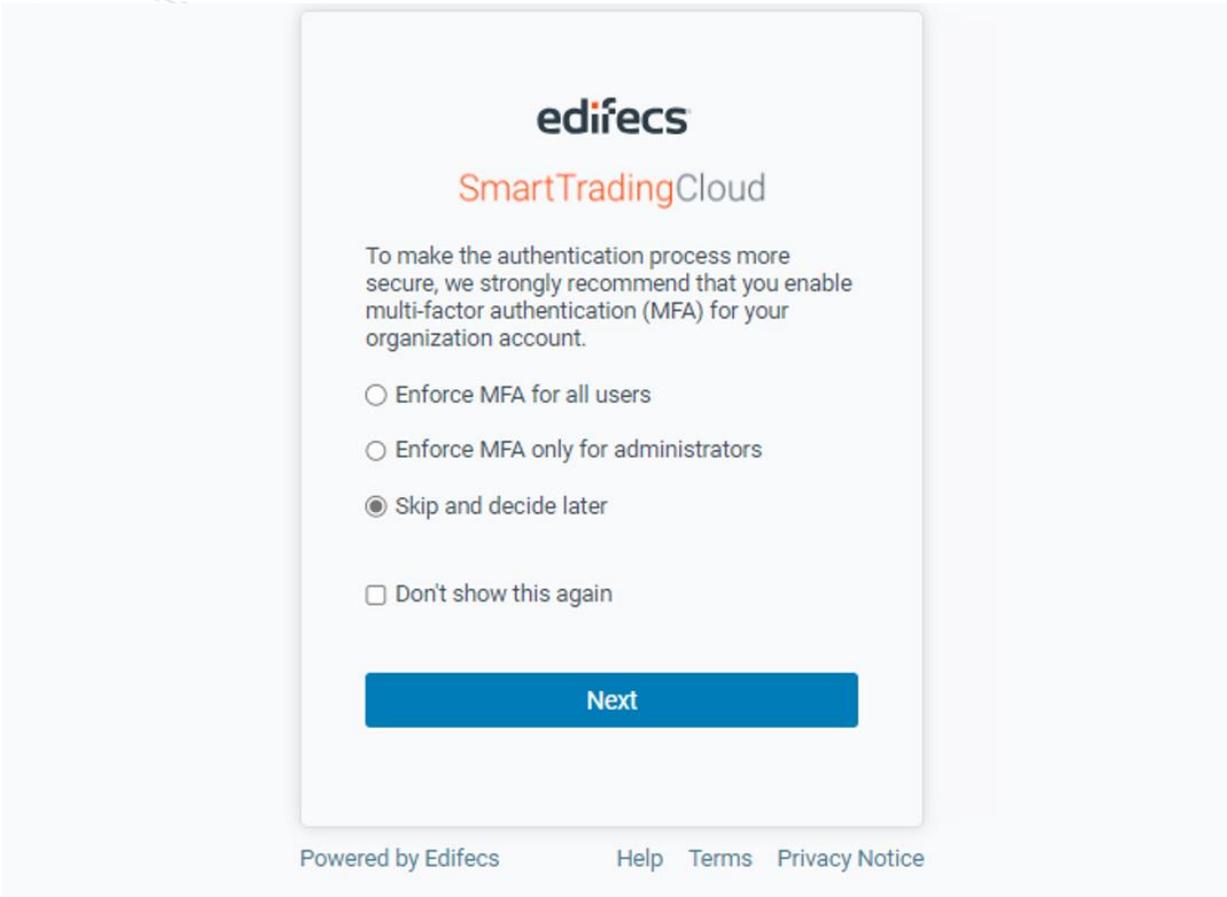
7. Once you click **Confirm**, Onboarding and Testing Cloud Service displays a prompt with the message that a confirmation email has been sent to your email address.



After you have registered your organization on Onboarding and Testing Cloud Service, a CAQH CORE Organization administrator reviews your registration request and either approves or rejects your request based on the assessment.

Once your request is approved, you can go back to the Partners Portal and login to your organization account as an administrator.

When you login for the first time, Onboarding and Testing Cloud Service displays a prompt that asks whether you want to enforce multi-factor authentication for your organization user. If you want to configure multi-factor authentication later, select the option **Skip and decide later** and then click **Next**, which takes you to the Partners Portal user interface.



Section 1.2: Partner Portal User Interface

On login, you see the home page of the Partners Portal, which contains a textual description to help familiarize yourself with the portal.



About our Partner Portal

Welcome to our Partner Portal.

Here you will find everything you need to get onboarded with us and collaborate in different business initiatives to build a strong and lasting partnership. By employing a streamlined process through our Partner portal, we strive to provide our partners with an efficient and intuitive way to achieve their business goals.

Drive your business forward

Get everything you need to identify and address your requirements and deliver high-value business solutions to your customers.

1. **Programs** – Access our partner program to make the most out of our partnership.
2. **Learn** – Stay informed with our community resources, share information, complete your certifications and keep growing.
3. **Security** – Stay confident that your data is securely handled and constantly protected in accordance with HIPAA and State Privacy Laws.

Useful Links

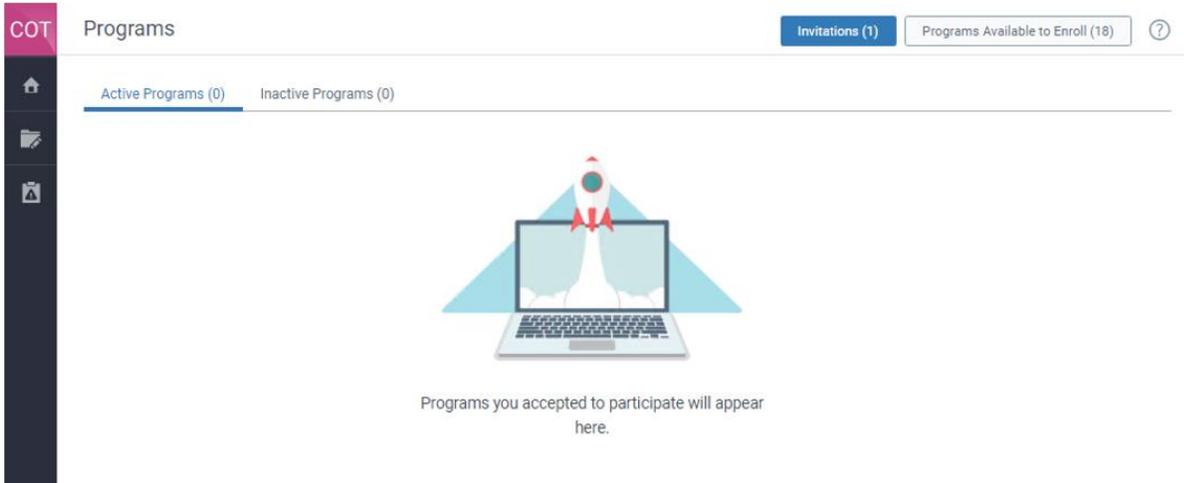
<To be entered by customer>

Contact Us

<To be entered by customer>

From the left navigation bar, you can click the icon  to access the **Programs** page, which displays the programs you are enrolled into and the programs available for self-enrollment. There are two tabs on the page – **Active Programs** and **Inactive Programs**, that list the programs you are enrolled into. But as a first-time user, since you are not enrolled into any program, you initially see no programs listed under this page. However, you can explore programs to participate in through the following two buttons on the **Programs** page:

- Invitations
- Programs Available to Enroll

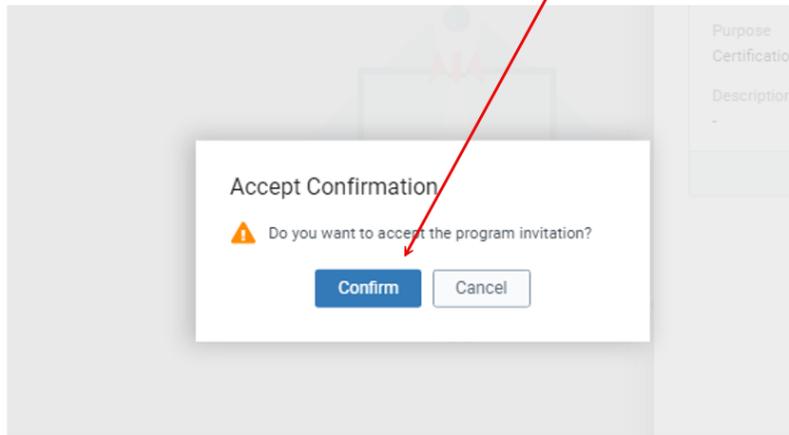
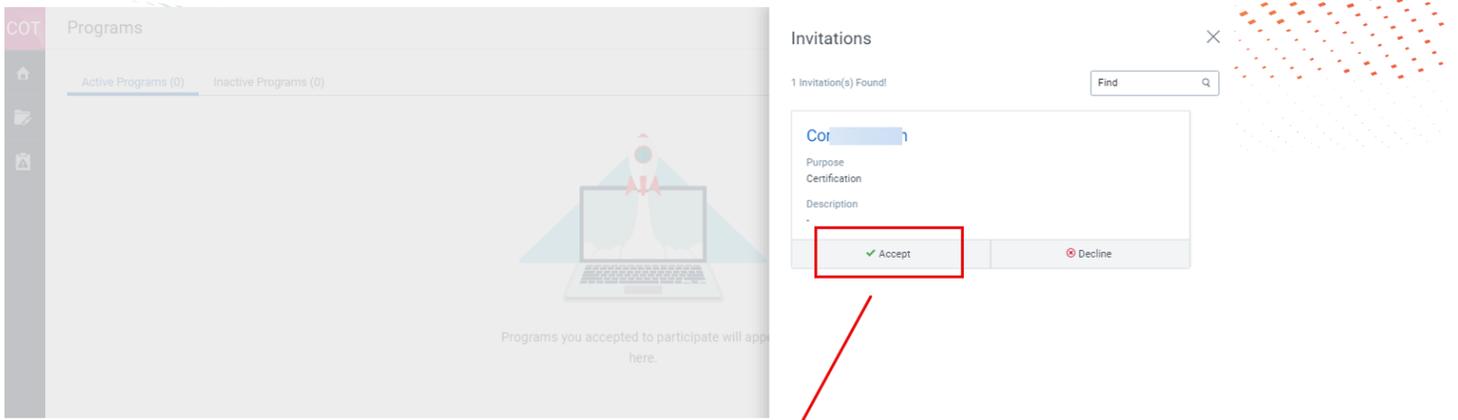


Invitations

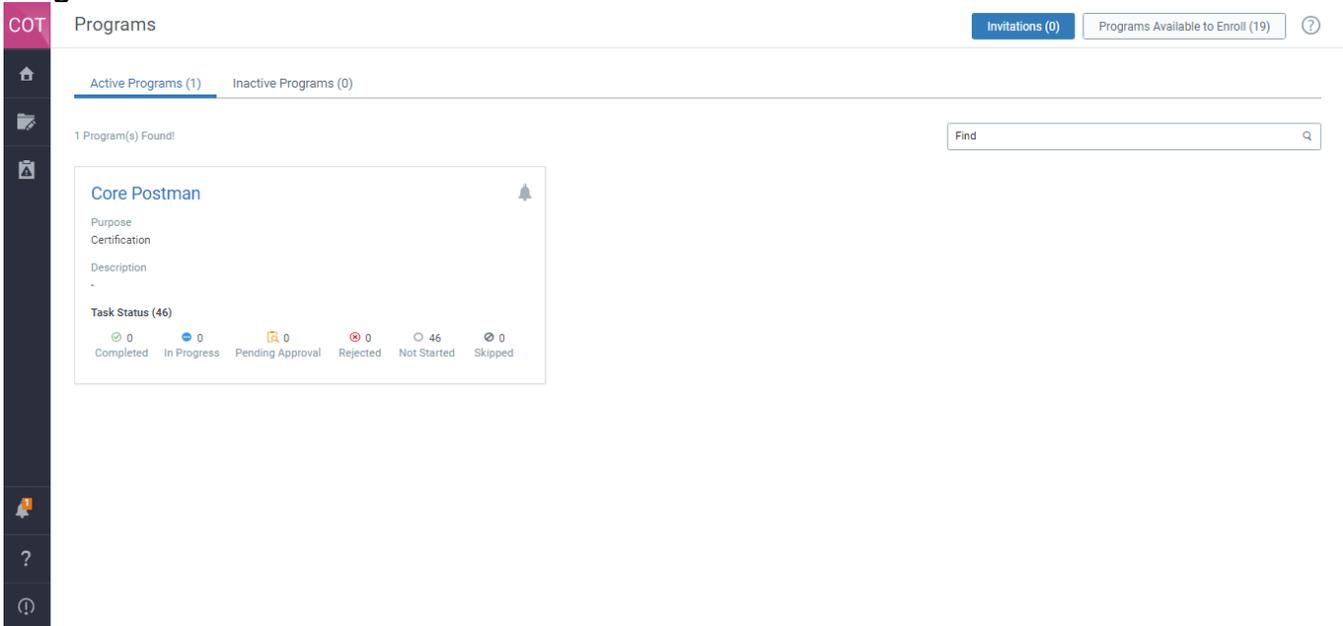
These are the programs your payer partner has enrolled your organization into.

To see the list of programs:

1. Click **Invitations** to open an overlay that displays the list of programs your organization is enrolled into.
2. Click **Accept** against a listed program and then click **Confirm** to participate in it.



Once you accept an invitation, the corresponding program becomes available under the **Active Programs** tab.



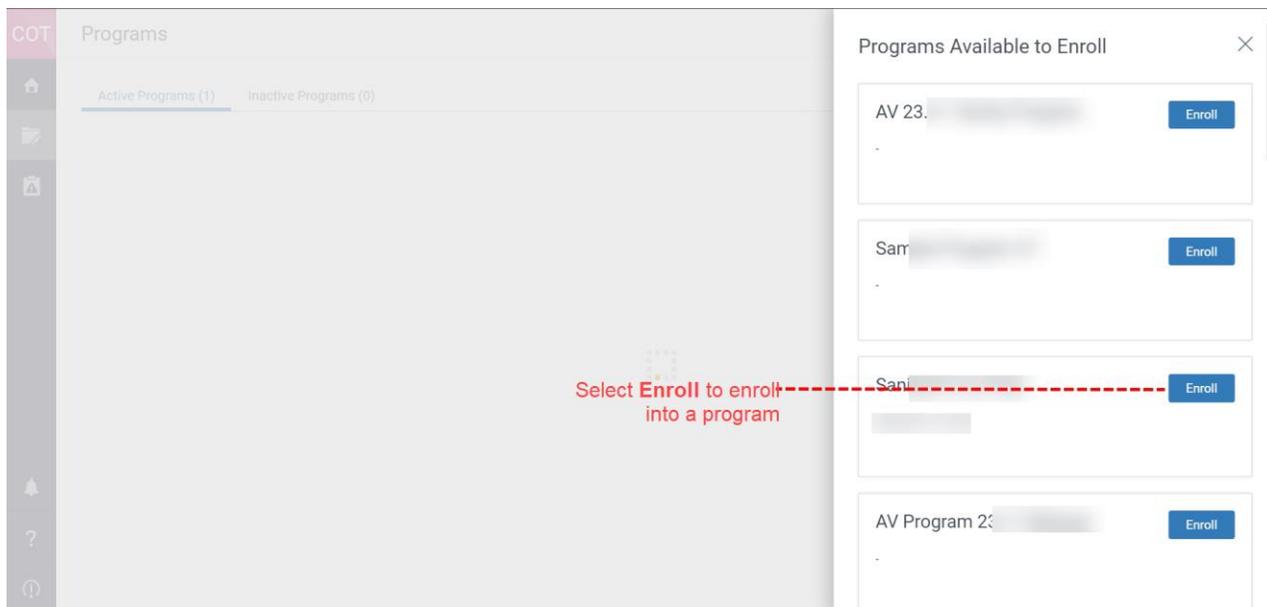
Note: If you have just registered your organization, you may not see any programs listed under *Invitations*.

Programs Available to Enroll

These are programs that are publicly available for partners to enroll into.

To see the list of programs:

1. Click **Programs Available to Enroll** to open an overlay that displays the list of programs available for enrollment.
2. Click **Enroll** against a listed program and then click **Confirm** on the pop-up to participate in the program.



After you self-enroll in a program, the program becomes available on the **Active Programs** tab.

Section 1.2.1: Program Details and Task Execution

You can select a program listed under the **Active Programs** tab to view its details and all the tasks available for execution. You can also filter the list of task type and status such as Mandatory Tasks, Not Started, In Progress, and so on.

AV Program 2

In Progress 14-Feb-2024

Filter tasks by type and status

Task Summary

Total Tasks 3

Mandatory Tasks 1

Task Status

Not Started 2 In Progress 0 Completed 1 Skipped 0 Pending Approval 0 Rejected 0

Tasks

3 Task(s) Found! Find

1. Core RT x509 Rest Submitter
Completed
2. Core Connectivity responder batch
Not Started
3. Certificate*
Not Started

1. Core RT x509 Rest Submitter

Completed 08-Mar-2024

Message Protocol REST API

Interaction Mode RealTime

Transaction Type X12 v5010 270/271 Healthcare Eligibility Benefit Inquiry and Response

Scenario Type Business Response

Execution Instructions

Comments (0) Add Comment

Tasks available in the program

Additionally, you click the ellipses icon  in the upper-right corner of the page to see the option to view detailed program overview.

Task Execution

To complete a program you are enrolled into, you must execute and complete all the tasks listed under the program. To execute a task:

1. Select a task from the listed tasks.
2. Click **Execute** or **Create Execution Run**.

AV Program 2

In Progress 14-Feb-2024

Task Summary

Total Tasks 3

Mandatory Tasks 1

Task Status

Not Started 2 In Progress 0 Completed 1 Skipped 0 Pending Approval 0 Rejected 0

Tasks

3 Task(s) Found! Find

1. Core RT x509 Rest Submitter
Completed
2. Core Connectivity responder batch
Not Started
3. Certificate*
Not Started

2. Core Connectivity responder batch

Execute Skip Mark Complete

Not Started 14-Feb-2024

Message Protocol REST API

Interaction Mode Batch

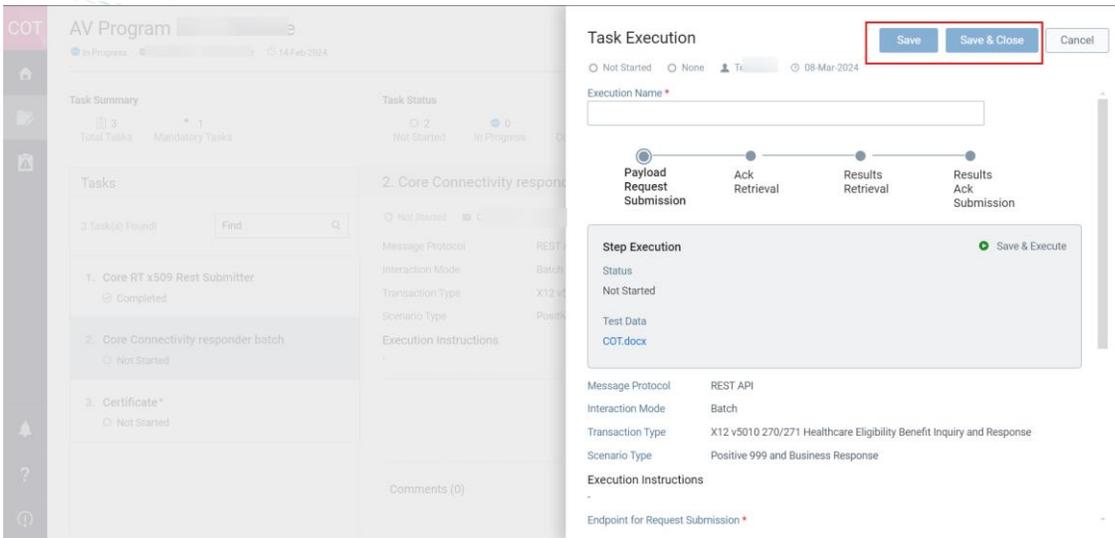
Transaction Type X12 v5010 270/271 Healthcare Eligibility Benefit Inquiry and Response

Scenario Type Positive 999 and Business Response

Execution Instructions

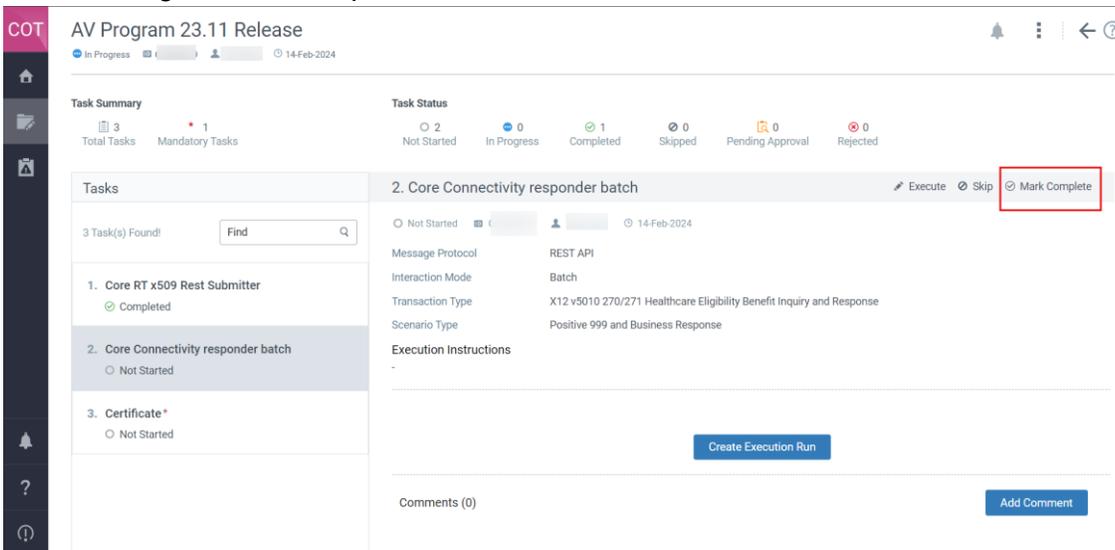
Create Execution Run

3. Go through all the required steps to execute the task and then click **Save** or **Save & Close**. Once you execute a task, its status changes from “Not Started” to “In Progress.”



Note: A program may contain different types of tasks; therefore, the execution steps may also vary from task to task.

- Once you have successfully completed all the required steps, you can also mark the task as complete through the option **Mark Complete**. Once you mark a task complete, its status changes from “In Progress” to “Completed.”

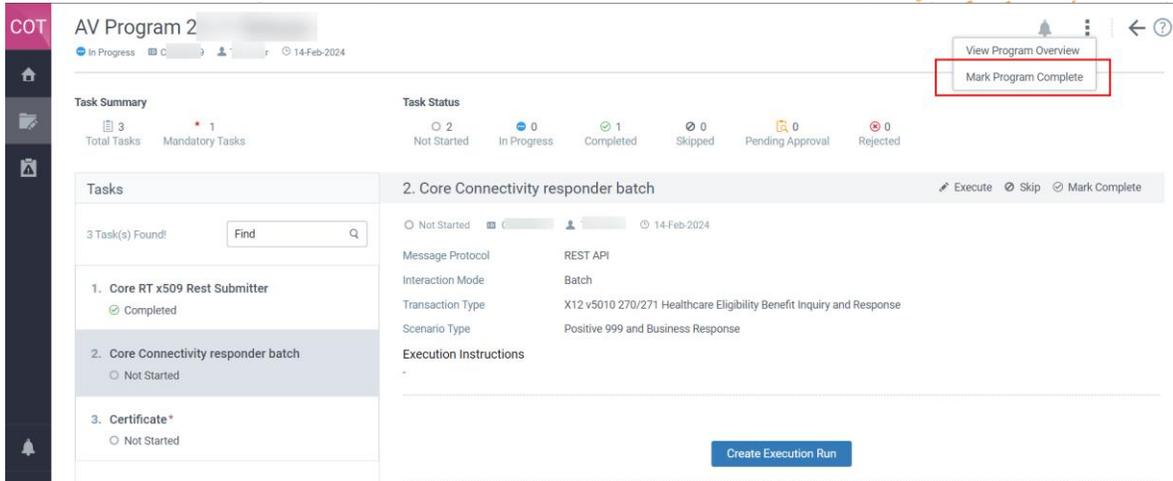


Note: A task can be skipped if the task is not applicable for your organization through the option **Skip**. Once you skip a task, the task becomes inactive for you and you cannot perform any other action on the task.

After you have executed all the tasks in a program, you can also mark the program complete. To mark a program complete:

- Click the ellipses icon  in the upper-right corner of the page to expand its options.

- Click the option **Mark Program Complete**. This also sends a notification to your payer partner that you have completed the program.



Note: On the [Edifecs login page](#), you can access the Partner Portal from the section Members Login. You can access the Partners Portal with the same credentials with which you are registered with Edifecs.

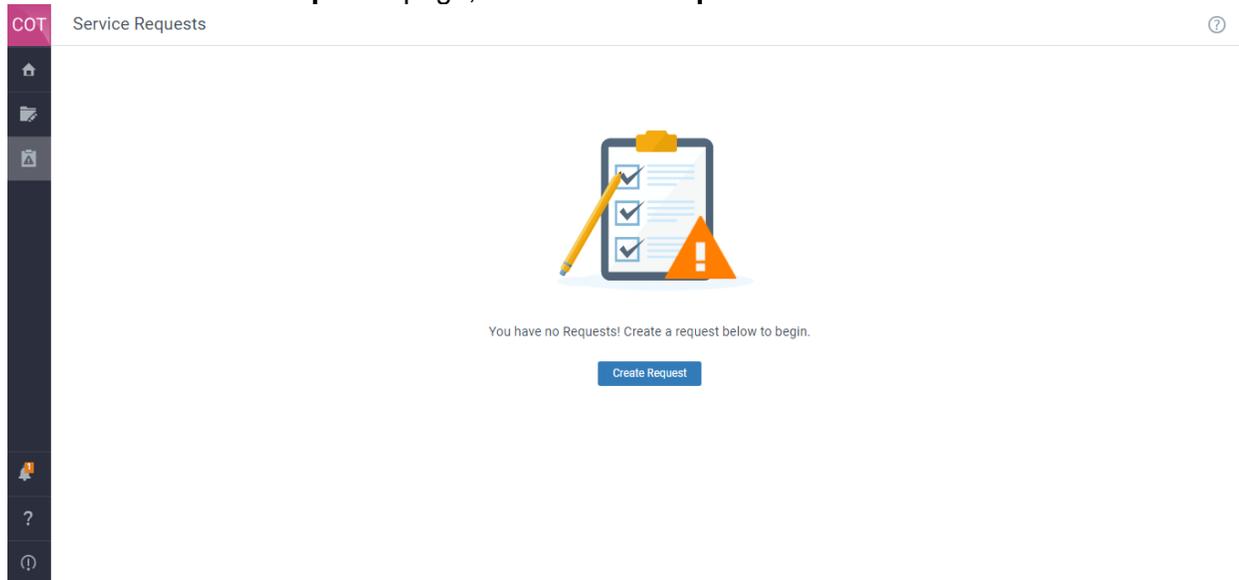
Section 1.2.2: Service Requests

The **Service Requests** page of the partner portal allows you to create service requests when you encounter issues during program execution or when you need to convey a message to the payer organization.

In the **Service Requests** section, you can create service requests with different purposes, such as a request, question, and comment.

To create a request:

- On the **Service Requests** page, click **Create Request**.



- In the **Create Request** dialog, provide information for the following fields:

- **Name:** A short description of a certain service request.
- **Organization:** The organization you want to inform about a certain issue.
- **Assignee:** The internal user of your organization who is responsible for the request resolving.
- **Program:** A specific program for which you want to create the request.
- **Category:** A category of a certain service request based on its purpose, such as *Request, Question, Comment*.
- **Status:** A status of a certain service request based on its life cycle, such as *Open, Open Partner, Closed, Closed Pending Confirmation, Closed Pending Partner Confirmation*.
- **Severity:** The severity of a certain service request indicates the assessment of the impact that the issue can cause, such as *Critical, Serious, Important, Routine, Defer*.
- **Description:** Any remarks to share while editing or working on the request.

Create Request Create Cancel

Name*

Partner Organization

Assignee ⓘ

Program

Notify User(s)

Category*

Status* Severity*

Description

Upload Reference Document(s) ⬆
 No file uploaded.

3. Upload documents related to a service request, if required.
4. Click **Create** to create the service request.

Summary

Request List

Search by Request Name/ID

1 Request(s) Found!

Status	ID	Name	Severity	Category
Open	4	J	Important	Request

Records 1 - 1 of 1 << < Page 1 of 1 > >> Records per Page 50

Request Details: J

05-Mar-2024

Program: Test Test Status: Open

Organization: CAQH Severity: Important

Assignee: F Category: Request

Notify User(s): hz Created By: E

Created On: 05-Mar-2024

Description: Please enroll us in this Program.

The Service Requests page also contains the following sections to display information about the already logged service requests:

- Summary
- Request List
- Request Details

Service Requests

Create Request ?

Summary

Click on charts to filter the Request List below

Requests by Severity

4 Total

1 Intermediate, 1 Major, 2 Minor

Requests by Status

Open: 4

Requests by Category

Upload: 2, Info: 2

Request List

Search by Request Name/ID

4 Request(s) Found!

Status	ID	Name	Severity	Category
Open	3	G	Intermediate	Upload
Open	6	F	Minor	Info
Open	1	F	Minor	Info
Open	6	F	Major	Upload

Records 1 - 4 of 4 << < Page 1 of 1 > >> Records per Page 50

Request Details: C

13-Dec-2023

Program: - Status: Open

Organization: - Severity: Intermediate

Assignee: - Category: Upload

Notify User(s): - Created By: -

Created On: 13-Dec-2023

Description: -

Comments (2)

how we can help you? 13-Dec-2023 03:32

13-Dec-2023 03:31 Hello

In the **Summary** section, you can:

- View summary of all the service requests based on their severity, status, and category on charts.
- Filter service requests in the requests list by their severity, status, category by clicking items on each chart.

In the **Request List** section, you can:

- View the total count of service requests across all the programs.

- Search for a specific request by its ID and name.
- View the status, ID, name, severity, category of each request.
- Click a specific request to view its details.

Note: You can also view program specific service requests by selecting a program listed under the Programs page of the Partners Portal.

In the **Request Details** section, you can:

- Edit a certain request.
- Specify the changes of each request by entering remarks or notes.
- Upload reference document(s) for a certain request in a comment.
- Track a service request to its closure.
- View the conversation history of a certain service request.
- Use comments, which are displayed in a form of conversation, for communication.

Note: You cannot delete a service request.

Section 1.3: Which CORE Stakeholder am I?

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

- **Provider** – Providers are those physicians, physician groups, and hospitals that need to determine the eligibility or request claim status information of a patient. They do this by sending information to a clearinghouse or health plan in the form of an eligibility request (HIPAA 270 transaction) or a claim status request (HIPAA 276 transaction).
- **Provider Vendor** – A Vendor is an organization that provides practice management, eligibility-specific, or claim status-specific information systems to providers, hospitals, or other patient care professionals. A vendor may be performing the testing to certify their own information systems for these various capabilities. The Provider Vendor submits HIPAA 270 and/or the HIPAA 276 transactions.
- **Health Plan** – A Health Plan is a payer organization with members who are serviced by the provider community. Health Plans hold all the information relative to a patient's eligibility and claim status information. They respond to eligibility requests with the eligibility information, usually in the form of the HIPAA 271 transaction, and the claim status information, usually in the form of the HIPAA 277 transaction.
- **Clearinghouse** – A Clearinghouse can serve several roles in the eligibility process, and they are given three options here as a CORE Stakeholder to identify which services they perform.
- **Clearinghouse (submit request only)** – There are clearinghouses that offer Providers a way to request eligibility information claim status information or to request both. These clearinghouses submit the eligibility request (HIPAA 270) or the claim status request (HIPAA 276) on behalf of the provider. They do not hold any eligibility information or claim status information of their own, and so only perform the request, asking for eligibility or claim status information from the Health Plans.
- **Clearinghouse (receive request only)** – Other clearinghouses act as front ends for Health Plans and receive the eligibility or claim status requests from the providers. They don't contract with the

providers directly but hold the eligibility or claim status information from Health Plans or provide Health Plans with access to receive the eligibility or claim status requests and fashion the eligibility response or claim status information.

- **Clearinghouse (submit and receive)** – Other clearinghouses operate in both directions. This means that they neither hold the eligibility nor claim status information, but rather operate as a gateway between the providers and health plans, or that they hold information from some provider groups as well as some health plans. These entities will process and either create or distribute the 270 and 271 HIPAA transactions or the 276 and 277 HIPAA transactions or both. Most clearinghouses will fall under this umbrella.
- **CORE Endorser** – This option has been left in place for the Edifecs CORE Certification Testing System, although there are no programs or tasks associated with the CORE Endorser option. Selecting this option will not give the user access to any of the testing programs but will provide access to the internal CORE Welcome page, where additional information can be found.

Section 1.4: What is Batch vs. Real-Time?

As part of your organization profile, you are required to specify whether you need to process transactions in Real Time only, or Real-Time and Batch. CAQH CORE has developed several rules related to these different processing modes. Some of the CORE Rules have requirements specific to Batch and thus the Connectivity Rule is tested in both cases.

Real-time processing is required of all CORE Stakeholders, but Batch processing is optional. However, entities that support batch are required to complete the batch testing. In Real Time there is an immediate response to a request, in Batch most requests will be returned by 7 AM the following day. If you plan to support Batch processing and thus are required to test that system with CORE, select “Both Batch and Real Time”, otherwise select “Real Time Only.”

Section 1.5: CORE Pledge Date, What and How?

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

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

Section 1.6: From Account Approval to Testing

Account setup and approval is the last of Self-Registration. There will be a period between when registration is completed, and an account is approved and ready for testing. It is expected that Edifecs Support will respond to self-registration requests within **three** business hours of a business day. Edifecs defines the business day as 9 AM to 5 PM Pacific Time. Edifecs Support is available from 5 AM to 5 PM Pacific, so the approval of an account may take place before the 9 AM Pacific Time deadline. You will receive an email notification after your registration is approved.

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

Section 2: CORE Certification Testing, the Process

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

If registered, you can log in by going to the “Home” page at <https://onboarding.uat.edifecsfedcloud.com/#/portal/caqh> and entering the username and password.

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

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

There are four programs in which you might be enrolled depending on your stakeholder type and support of batch transactions. More than one program may apply to your organization. The programs are as follows:

- **Information Requestor Batch Testing.** This program is for Providers, Vendors, and Clearinghouses who submit eligibility or claim status requests using the batch processing mode. This program will test your system’s ability to submit 270 or 276 requests and to receive and process 271 or 277 in a batch processing mode. This program tests the batch acknowledgments and response time functions.
- **Information Requestor Real-Time Testing.** This program is for Providers, Vendors, and Clearinghouses who submit eligibility or claim status requests using the real-time processing mode. This program will test your system’s ability to submit and receive eligibility or claim status information using the SOAP+WSDL or REST API communications method, verifying receipt of data content, real-time acknowledgments, and publication of companion guides.
- **Information Source Batch Testing.** This program is for Health Plans and Clearinghouses that host eligibility or claim status information and respond to eligibility or claim status requests in batch processing mode. The batch program tests your system’s ability to respond to 270 or 276 requests with the appropriate acknowledgments, as well as to supply information related to your batch response time.
- **Information Source Real-Time Testing.** This program is to test Health Plans and Clearinghouses in their receipt use of 270 eligibility or 276 claims status requests in real-time. This program will test your system’s ability to send eligibility or claim status information using both the SOAP+WSDL and communications method, the real-time response time, acknowledgments, system availability, the publication of companion guides, as well as verifying that the returned 271 meets or exceeds the CORE data content rules.

Section 2.1: Accessing the Programs and Tasks

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

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

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

(**Tip:** The columns on the screen are expandable. For instance, if you can't see the entire task name, hover the mouse pointer on the task description so that you can see the entire task or program name.)

Section 2.2: How do I complete certain task types?

All of the tasks are structured similarly. The task name is descriptive of what the task is trying to accomplish. The CORE rule and test script to which the task applies are included in parentheses after the task name. Although there are several different tasks in each program, most can be grouped into a few task types. The major task types are uploading, connectivity, and other tasks. Although named differently and requiring different information, if you understand how the basic task type is to be completed, then the task directions should be sufficient to help you complete the task.

The first task that you will encounter in every program you are registered for is a question task. It merits discussion at this point because it is the first task in all programs.

Section 2.2.1: Upload Tasks

Upload tasks ask that you attach a file to complete a CORE rule test. The prime examples of this are the Eligibility and Benefit CORE System Availability #157 Rule or the Eligibility and Benefit/Claim Status Claim Status #250 Rule Section 4.7 Companion Guide. These tasks ask you to attach your published scheduled downtime or a sample page of your claim status companion guide. For example, this means that you take a page of your companion guide, create either a .tif or .pdf screen image of the guide, and attach it to the task. Once attached to the task you will mark this and the other Upload-type tasks as **“Partner Steps Complete”**. This will put the task in a “Pending” status to be reviewed by Edifecs Support. Please see subsection C entitled [“Task Validation, what is it”](#) for more information on what a pending task means. Once the task has been validated Edifecs Support will either mark the task as “Complete” or “Not Started”. If they mark the task as “Not Started”, they will put notes in the task to identify what was wrong or incomplete with the task.

Section 2.2.2: Connectivity Tasks

There are a number of tasks that will ask you to communicate with the system using the CORE Eligibility and Benefit/Claim Status connectivity method. Please see Section III entitled “Where do I go for

Connectivity information” for more information related to CORE Eligibility and Benefit/Claim Status Connectivity requirements. These tasks will give you the URL and other information necessary to submit or receive files and expect that you respond to the information you receive. Read the task instructions carefully as they will provide you with detailed information on how to complete the task. Edifecs will not perform the tasks for you. These tasks are auto-validated, which means that once the task is complete it will either report as “Completed” or “Failed”.

Section 2.2.3: Other Type Task

There are other tasks that require you to confirm that you have signed the CORE Pledge (or submitted the Recertification Seal Application Form if Recertifying), downloaded the CORE Rules, Test Scripts, and test bed data, and generally respond to questions. These tasks are most easily completed by thoroughly reading the task instructions and following them. There are a limited number of these types of tasks, and all of them provide great detail in how to complete them.

Section 2.3: Task Validation, what is it?

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

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

Section 2.4: Using the CORE test bed data

As part of the testing process CORE has created 24 test bed cases in an Excel format: 16 cases for Subscriber only and 8 cases for Subscriber with Dependents. This test data is the base data that will be used during the testing. You will use the beneficiary and beneficiary with the dependent’s data to create the 270 eligibility requests, as well as use the eligibility membership information to format the 271-eligibility response. In the spreadsheet, data elements in the yellow highlighted cells are modifiable. The modification includes changing the actual data value, the length of the data value, the data type (numeric/ alphanumeric) of the data value, or not loading and using the data value. The Edifecs CORE Certification Testing System will validate that the data content is correct and meets the specifications of the CORE Data Content Rule. This test bed data spreadsheet will be downloaded in the second task along with the CORE Rules and the test script information. Reference the Eligibility and Benefit/Claim Status CORE Certification Test Suite Appendix (Test Suite Supplement) for detailed instructions and guidance for using the CORE test bed data.

Section 2.5: What if I have questions?

Any questions that you have related to the Edifecs CORE Certification Testing System can be addressed via logged issue by ‘Service Request’ or send an e-mail to support@edifecs.com or call Edifecs Support at 425-452-0630.

Section 2.6: How do I get a hold of Edifecs Support?

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

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

Section 3: Where do I go for Connectivity information?

Please contact your IT team and/or Network administrators for information related to your specific CORE connectivity implementation.

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