

EDI Support Services

Total OnBoarding User Manual for Providers

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Welcome to Total OnBoarding

Total OnBoarding System (TOB) is a user-friendly, online registration and testing tool. Providers use it to register with EDISS, add and modify that registration at any time, and test electronic claim submission.

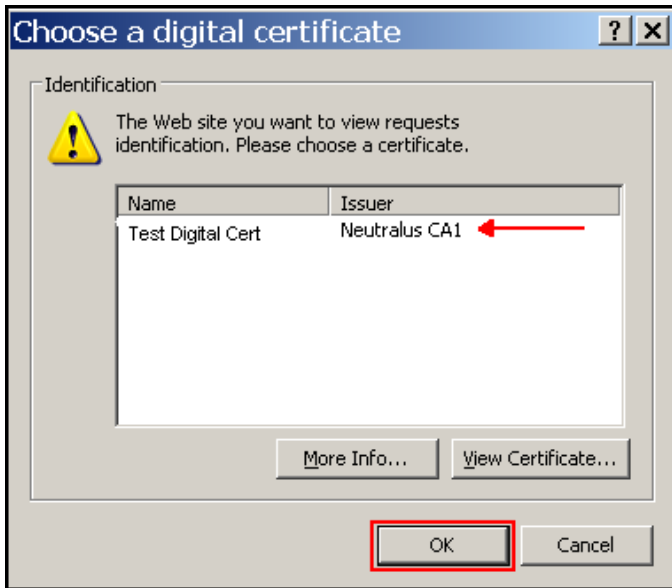
Web Site Address/Url

<https://noridian.totalonboarding.com>

Note: Each time a user navigates to the TOB website a pop up will appear asking to validate their digital certification. Choose the user's TOB digital certificate from the list and Click OK. If a digital certificate does not appear click

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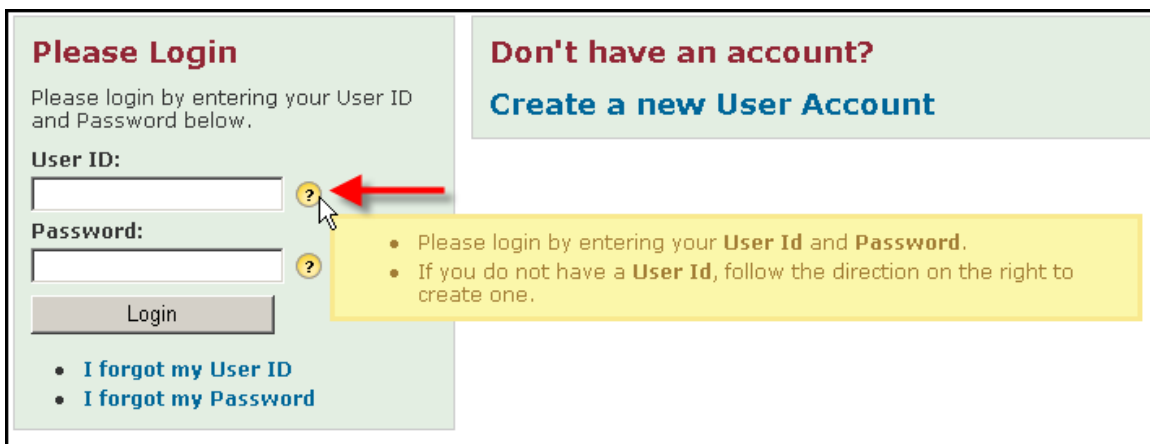
Cancel and either register as a new user or log in with the user ID and password. Without validating the digital certificate, test files cannot be entered in TOB.



Self-Registration

Information made available through the TOB application is offered to users based on registration. User registration for TOB will need to be completed online.

Note: On each screen within TOB there are help guides to aid in answering questions related to the online registration process. Hovering over the question mark reveals the information.



1. Click on Create a new User Account. This allows users to create an online account for accessing online profile information.

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Don't have an account?

Create a new User Account

A selection menu appears.

2. Click I am a Provider.

Don't have an account?

Create a new User Account

Choose your account type by clicking the appropriate link below. ?

I am a Provider

[I am a Billing Service / Clearinghouse](#)

[I am a Software Vendor](#)

[I am an Iowa Medicaid Additional Access Requester](#)

3. Specify whether or not you are currently doing business with EDISS.
 - A. Select Yes if you are currently registered with EDISS and have a 7-character Submitter ID. When prompted, enter the Submitter ID and associated Tax Identification Number (TIN).

Please specify whether or not you are currently submitting claims to EDISS.

Yes, and I have a 7-character Submitter ID. ?

Submitter ID:

TIN:


No


- B. Select No if you not currently registered with EDISS and/or do not have a 7-character Submitter ID.

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Are you currently doing business with EDISS?

Please specify whether or not you are currently submitting claims to EDISS.

Yes, and I have a 7-character Submitter ID. 

No 

Vendors are not permitted to enroll on behalf of a Provider

Per CMS (IOM Publication 100-04, Chapter 24, Section 20), providers "are not permitted to share their personal EDI access number and password with any billing agent, clearinghouse/network service vendor; to anyone on their own staff who does not need to see the data for completion of a valid electronic claim, to process a remittance advice for a claim, to verify beneficiary eligibility, or to determine the status of a claim; and that no other non-staff individuals or entities may be permitted to use a provider's EDI number and password to access Medicare systems."


To follow the CMS guidelines, EDISS requires that only individuals who have the authority to enter into, administrate, and/or terminate contracts and make determinations on behalf of the group complete the enrollment process. Vendors are not allowed to complete the initial enrollment process in Total OnBoarding[®] on behalf of the provider.

Clearinghouses and other third party representatives must obtain and use their own unique EDI access number and password from the Medicare contractors to whom they send or receive EDI transactions.

4. Click on Next.

Are you currently doing business with EDISS?

Please specify whether or not you are currently submitting claims to EDISS.

Yes, and I have a 7-character Submitter ID. 


No

Vendors are not permitted to enroll on behalf of a Provider

Per CMS (IOM Publication 100-04, Chapter 24, Section 20), providers "are not permitted to share their personal EDI access number and password with any billing agent, clearinghouse/network service vendor; to anyone on their own staff who does not need to see the data for completion of a valid electronic claim, to process a remittance advice for a claim, to verify beneficiary eligibility, or to determine the status of a claim; and that no other non-staff individuals or entities may be permitted to use a provider's EDI number and password to access Medicare systems."

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Clearinghouses and other third party representatives must obtain and use their own unique EDI access number and password from the Medicare contractors to whom they send or receive EDI transactions.



Note: Vendors are not permitted to enroll on behalf of a Provider.

5. Complete the Facility and Contact Information and click on Next.

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Provide Contact Information

Company Information

Company Name

DBA Name ?

Contact Information ?

First Name

Last Name

Phone (555) 555-1234 Phone Extension Numbers-only Fax (555) 555-1234

Address Information

Address 1 ?

Address 2

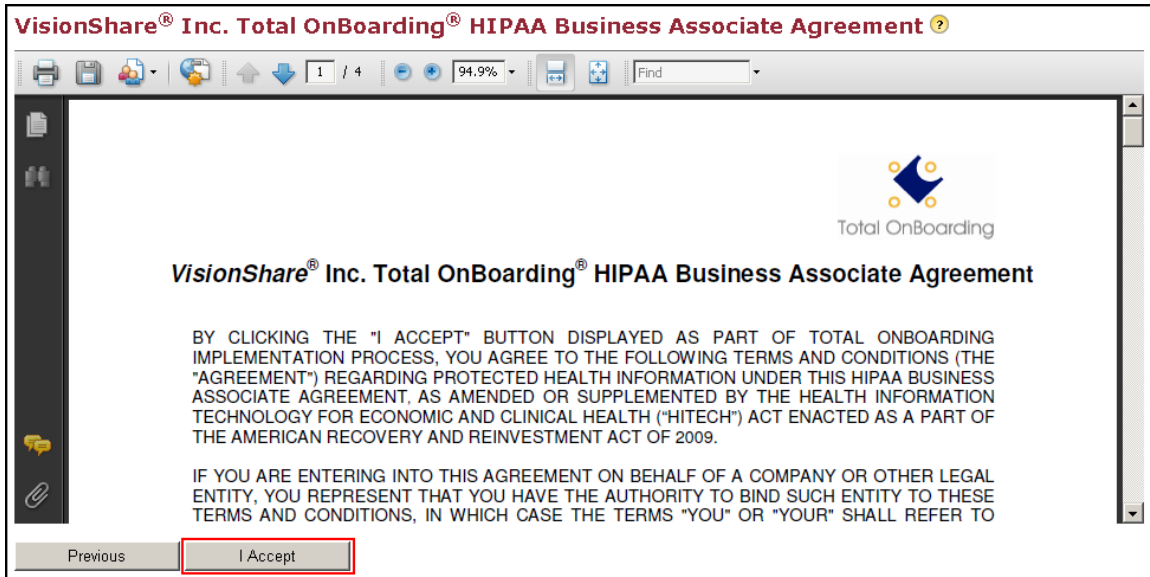
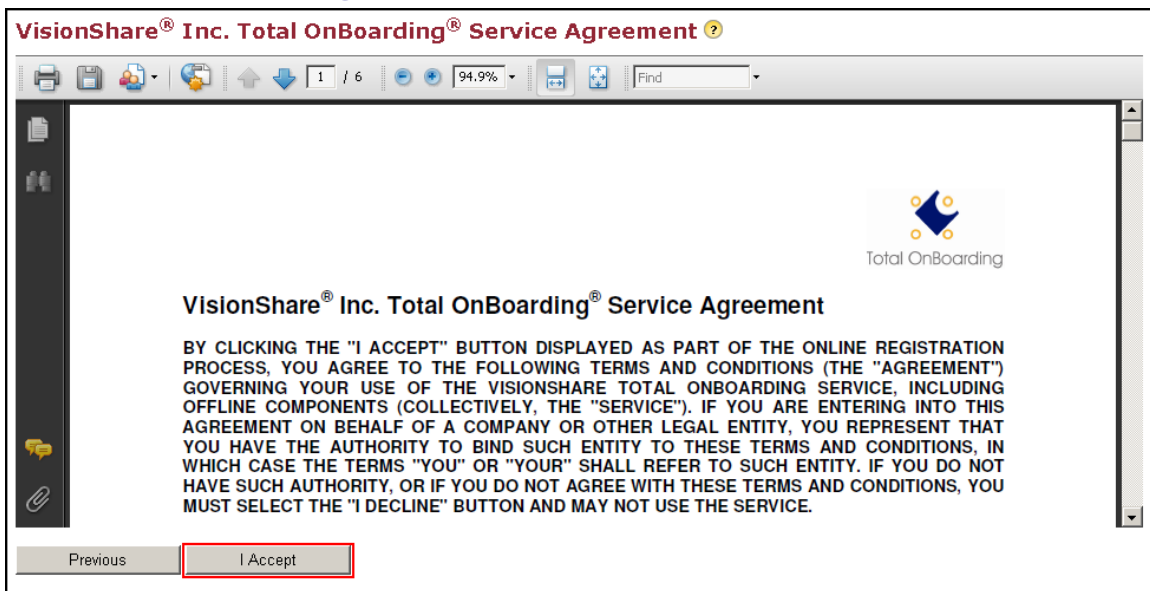
City State/Province Postal Code ?

Previous **Next**

Note: If an existing provider, these fields are automatically populated with the information on file with EDISS. Verification of the information is required. If any information is missing from the EDISS verification process, users are prompted to enter it before they can continue.

6. Read and Accept VisionShare Agreements. This starts the Identity Validation & Certificate Install Process (IVF) of receiving a Digital Certificate. The testing process cannot be started until the IVF process is completed through VisionShare.

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7. Complete Online Account Information and click on Next. This creates the User ID and password used to access TOB.

Note: TOB passwords have unique requirements that must be met. These requirements can be found by hovering over the question mark next to the password field.

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Create Online Account ?

User Name ?	Email Address ?
<input type="text"/>	<input type="text"/>
Password ?	Confirm Password
<input type="text"/>	<input type="text"/>
Security Question ?	
<input type="text"/>	
Security Answer	
<input type="text"/>	

Previous **Next**

8. A confirmation page appears showing the account was created.

Account Created

Thank you for enrolling! Your account has been created. Please record your User ID and password in a secure location. You will need them to continue setting up your account. Feel free to use your browser's print button to print this page for your records.

User ID:
Password:

Please continue to your Total OnBoarding® Profile Summary page to add, update and/or review and confirm currently assigned Lines of Business and the related transactions.

Next

9. Click on Next.

Account Created

Thank you for enrolling! Your account has been created. Please record your User ID and password in a secure location. You will need them to continue setting up your account. Feel free to use your browser's print button to print this page for your records.

User ID:
Password:

Please continue to your Total OnBoarding® Profile Summary page to add, update and/or review and confirm currently assigned Lines of Business and the related transactions.

Next

10. The Summary Page appears. Providers continue their registration by selecting from the menu options.

Total Onboarding User Manual

Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

[Manage NPIs](#) [Select Vendors](#)

Search by: for:
You may use * as a wildcard character.

Note: Providers need to select at least one NPI for their profile and add the Lines of Business and transactions to that NPI before EDI enrollment can be completed. Select Manage NPIs from the profile menu options to complete this step. The next section of this user guide provides instructions for all the profile menu options.

Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

[Manage NPIs](#) [Select Vendors](#)

Search by: for:
You may use * as a wildcard character.

Provider Summary Menu Options

Select Vendors

Click Select Vendors. This option allows providers to select the Vendors used for their electronic transactions.

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Home – ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

Search by: for:

You may use * as a wildcard character.

Select a Vendor from the list and click Add to add them to your profile. Providers can also search for a specific Vendor by choosing a method to search by, entering the information for the search and clicking Search.

Vendors

Selected Vendor(s)

TPID	Vendor	Type	Action
There are no vendors assigned.			

Search by: within: for:

You may use Name, DBAName, or Trading Partner ID as a search factor.

TPID	Vendor	Type	Action
CH00010	WEST BEND, IA	Clearinghouse	Add

Once a Vendor is added to a profile it can be removed by selecting Remove next to the Vendor.

Vendors

Selected Vendor(s)

TPID	Vendor	Type	Action
CH00010		Clearinghouse	Remove

Manage NPIs

Select Manage NPIs. This option allows providers to add NPIs to their profile, update their TIN, and edit their transactions.

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Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

[Manage NPIs](#) [Select Vendors](#)

Search by: for:

You may use * as a wildcard character.

Add the NPI, regions, and TIN and click Add to add that NPI to the provider profile.

Manage NPIs -

NPI ?	Region(s) ?	TIN ?	Action
<input type="text"/>	<input type="text" value="Select options"/>	<input type="text"/>	Add

Once all NPIs are added, select Save.

An NPI can be removed at any time by selecting Remove. However, the TOB profile must contain at least one NPI.

Manage NPIs - Beth Test

NPI ?	Region(s) ?	TIN ?	Action
<input type="text"/>	<input type="text" value="Select options"/>	<input type="text"/>	Add
1111111111	AZ	123456789	Remove

Once that NPI has been saved it will appear on the main profile page.

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Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

[Manage NPIs](#) [Select Vendors](#)

Search by: for:
You may use * as a wildcard character.

NPI	Production Status	Percentage Complete	Notes
1111111111	0 of 0 transactions	0%	

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Manage Transactions

To update the Lines of Business or the transactions for a profile, click on the NPI that needs to be updated.

Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 0 received	View Forms ?
Software Vendor		Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

NPIs: ?

[Manage NPIs](#) [Select Vendors](#)

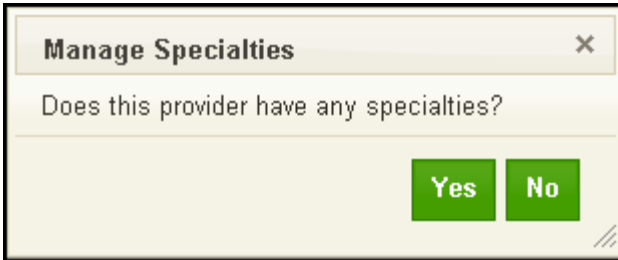
Search by: for:
You may use * as a wildcard character.

NPI	Production Status	Percentage Complete	Notes
1111111111	0 of 0 transactions	0%	

<< < Page 1 of 1 > >>

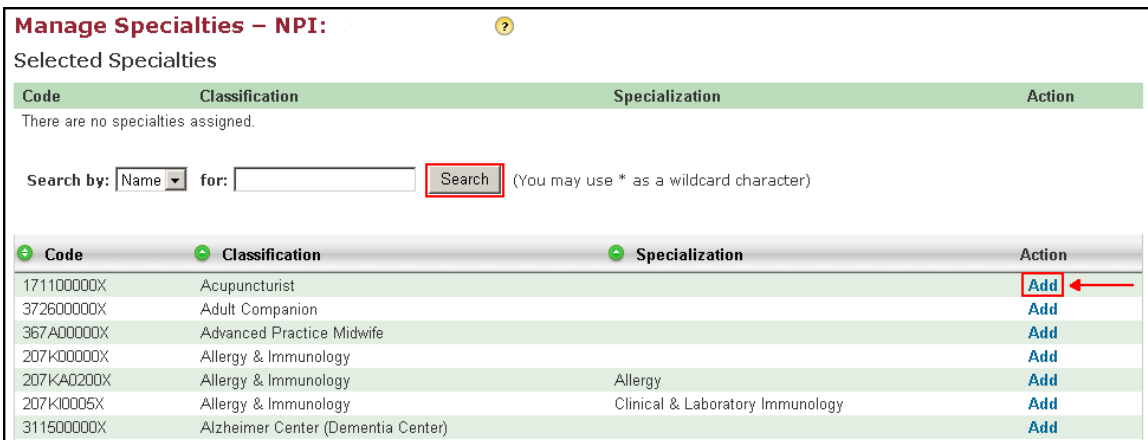
This will cause a prompt to appear asking if there are any specialties that need to be added to the profile. This is helpful if a provider wants to test certain kind of claims based on specialty. Select Yes to add specialties to the profile. Select No to skip this step.

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A dialog box titled "Manage Specialties" with a close button (X) in the top right corner. The main text asks "Does this provider have any specialties?". At the bottom, there are two green buttons labeled "Yes" and "No".

Select the specialties from the list and click Add, or search for a specific specialty using the search option and then add it to the profile.



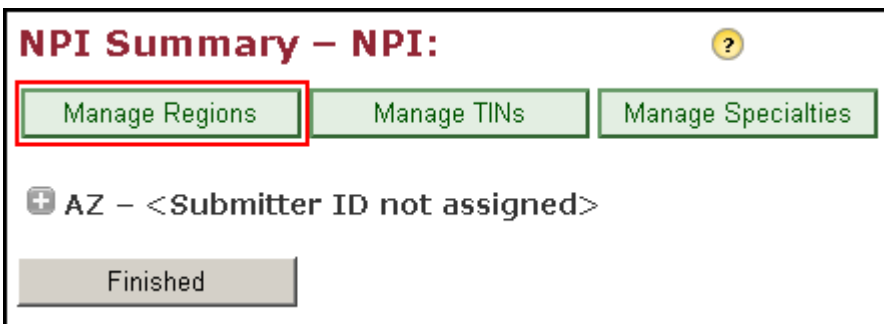
The "Manage Specialties - NPI" screen features a search bar with a dropdown menu for "Name" and a "Search" button. Below the search bar is a table of specialties with columns for Code, Classification, Specialization, and Action. The "Add" button in the Action column for the first row is highlighted with a red box and a red arrow.

Code	Classification	Specialization	Action
171100000X	Acupuncturist		Add
372600000X	Adult Companion		Add
367A00000X	Advanced Practice Midwife		Add
207K00000X	Allergy & Immunology		Add
207KA0200X	Allergy & Immunology	Allergy	Add
207KI0005X	Allergy & Immunology	Clinical & Laboratory Immunology	Add
311500000X	Alzheimer Center (Dementia Center)		Add

The NPI screen has different Menu options.

Manage Regions

Select Manage Regions to add or remove states from the profile.



The "NPI Summary - NPI" screen displays three menu buttons: "Manage Regions", "Manage TINs", and "Manage Specialties". The "Manage Regions" button is highlighted with a red box. Below the buttons, there is a section for "AZ - <Submitter ID not assigned>" and a "Finished" button.

Manage TINs

Select Manage TINs to add or remove Tax Identification Numbers from the profile.

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NPI Summary – NPI: ?

Manage Regions **Manage TINs** Manage Specialties

+ AZ – <Submitter ID not assigned>

Finished

Manage Specialties

Select Manage Specialties to add or remove specialties from the profile.

NPI Summary – NPI: ?

Manage Regions Manage TINs **Manage Specialties**

+ AZ – <Submitter ID not assigned>

Finished

Manage Transactions

To add or remove transactions from the profile select the + sign next to the state. All available Lines of Business for that state will appear.

NPI Summary – NPI: ?

Manage Regions Manage TINs Manage Specialties

+ AZ – <Submitter ID not assigned>

Transaction	TPID	Forms	Testing	Production
Medicare Institutional of Arizona				Select Transactions
Medicare Professional of Arizona				Select Transactions

Finished

Choose Select Transactions next to the correct Line of Business.

NPI Summary – NPI: ?

Manage Regions Manage TINs Manage Specialties

+ AZ – <Submitter ID not assigned>

Transaction	TPID	Forms	Testing	Production
Medicare Institutional of Arizona				Select Transactions
Medicare Professional of Arizona				Select Transactions

Finished

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All the available transactions for that Line of Business will appear. Select Enroll for each transaction type to be added to the profile.

Select Transactions – NPI: ?

Line of Business: Medicare Institutional of Arizona

EDI Type	Description	Trading Partner	Action
8371	Health Care Claim Institutional		Enroll
835	Payment Advice		Enroll
276	Health Care Claim Status Request		Enroll

Finished

A selection is made from the drop down as to how this transaction is transmitted. Select Save when finished.

Note: It is important to select the transmitting vendors prior to adding transactions to the NPI. See Select Vendor section of this User Guide.

Select Transactions – NPI: ?

Line of Business: Medicare Institutional of Arizona

EDI Type	Description	Trading Partner	Action
8371	Health Care Claim Institutional		
835	Payment Advice		
276	Health Care Claim Status Request		

Finished

Note: For 837 transactions a provider may select one or two methods to transmit. If two methods are chosen, a prompt appears asking the provider which on the two methods is primary. An indication of the type of claim is also required on all 837 transactions.


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Complete Enrollment ✕

Report Recipient:

Please select the organization that is to receive EDI reports MB001 and MA006 related to the submission of 837 transactions.

A selection of Direct is an indication you would like all reports related to 837s sent to your location, not to a vendor (i.e. clearinghouse or billing service).

Direct 

Vendor

Optional Claim Types:

The Line of Business you have selected has optional claim types, such as Medicare Secondary Payer, that may be tested. Please select the optional claim types that your organization will be submitting in production.





Claim Type	Direct	
Standard HIPAA Claim	<input type="checkbox"/>	<input type="checkbox"/>
Medicare Secondary Payer*	<input type="checkbox"/>	

* optional

Cancel **Save**

View IVF Process

Select View IVF Process. This option displays a document with information on completing the Identity Verification with VisionShare. There are also instructions on how to initialize the digital certificate from VisionShare.

Action	
View IVF Process	
View Forms	
Software Vendor	
Select Managing Vendor	
Edit Profile View Summary	

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View Forms

Select View Forms. This displays the required forms necessary to enroll with EDISS for the Lines of Business indicated on the profile.

Action	
View IVF Process	?
View Forms	?
Software Vendor	?
Select Managing Vendor	?
Edit Profile View Summary	?

The required forms must be downloaded, completed, printed, and faxed into EDISS.

View Forms - ?		
Form	Status	Action
CMS EDI Enroll	Not Received	Download

[Back](#)

Software Vendor

Select Software Vendor. This option allows the provider to add a Software Vendor to their profile.

Action	
View IVF Process	?
View Forms	?
Software Vendor	?
Select Managing Vendor	?
Edit Profile View Summary	?

Select the software vendor from the drop down menu and click Save.

Select Software Vendor ?	
Please select the Software Vendor your organization uses to generate claims. If the Software Vendor does not appear on the list, select "Other - Not Listed".	
<input type="text" value="PC-Ace Pro 32"/>	←
Cancel	Save

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Note: If the provider chooses PC-ACE, the PC-ACE Service Agreement will appear. Read the Agreement and Click I Accept to use the PC-ACE software. The provider receives an e-mail with instructions on how to download the PC-ACE software.

Home Send Test File Inbox (3) FAQ Contact Logout

Accept PC-ACE Service Agreement

EDI Support Services PC-ACE Pro32 Software Sublicense Agreement Completion Instructions

These instructions will assist you in completing the EDI Support Services (EDISS) PC-ACE Pro32 Software Sublicense Agreement. The information provided will be used to allow Trading Partners access to the PC-ACE Pro32 software. The installation password for PC-ACE Pro32 cannot be released until this Software Sublicense Agreement is on file. All sections must be filled out. **Print legibly and complete every section as accurately as possible.** After completion, please mail the PC-ACE Pro32 Software Sublicense Agreement to: EDI Support Services, PO Box 6729 Fargo, ND 58108-6729. The form can also be faxed to EDISS at 877-269-1472. If you have any additional questions, please contact EDI Support Services at 800-967-7902.

IDENTIFICATION NUMBER

A. Providers/facilities using PC-ACE Pro 32 enter their provider number and NPI in the fields provided.
B. Vendors using PC-ACE Pro 32 enter their EDISS-assigned Trading Partner ID in this field.

FACILITY INFORMATION SECTION

Figure 1 below is a representation of the Facility Information Section of the PC-ACE Pro32 Software Sublicense Agreement. Complete each line on the attached Agreement per the instructions below.

Figure 1

Facility Name:	_____	← (Print the name of the provider/facility.)*
Address:	_____	← (Print the address of the provider's facility/office.)*
City, State, Zip:	_____	← (Print the contact name for the provider's facility/office.)*
Contact Name:	_____	

Previous **I Accept**

Select Managing Vendor

Select Managing Vendor. This option allows the provider to give their vendor access to their profile, and allows the vendor to make changes on behalf of the provider.

Action	?
View IVF Process	?
View Forms	?
Software Vendor	?
Select Managing Vendor	?
Edit Profile View Summary	?

Select a Managing Vendor and Click Save. Other Vendors can be added to this page by clicking Select Vendors.

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Select a Managing Vendor ?

Select Vendors ?

Vendor	Trading Partner ID
<input type="radio"/> None	
<input checked="" type="radio"/> Vendor	CH00010

Cancel Save

The Provider Summary screen appears with an Account Locked statement.
Note: The provider can unlock their Provider Summary screen at any time by clicking here.

Home - ?

Area	Status	Action
Identity Verification Form	Not Required	View IVF Process ?
Forms	0 of 1 received	View Forms ?
Software Vendor	PC-Ace Pro 32 4/13/2010	Software Vendor ?
Managing Vendor		Select Managing Vendor ?
Profile	Last Updated: 4/13/2010	Edit Profile View Summary ?
Direct Trading Partner ID	Not Assigned	

Account Locked: ←

Your account is locked and can only be managed by . To unlock, please change your Managing Vendor selection by clicking [here](#).

Select None and Click Save to unlock the profile.

Select a Managing Vendor ?

Select Vendors ?

Vendor	Trading Partner ID
<input checked="" type="radio"/> None	
<input type="radio"/>	CH00010

Cancel Save

Edit Profile

Select Edit Profile. This option displays the users profile for editing purposes.

Action
View IVF Process ?
View Forms ?
Software Vendor ?
Select Managing Vendor ?
Edit Profile View Summary ?

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Edit information and click Save to save the update.

Company Information		
Company Name		
<input type="text" value="Beth Test"/>		
DBA Name ?		
<input type="text"/>		
Contact Information ?		
First Name		
<input type="text" value="Beth"/>		
Last Name		
<input type="text"/>		
Phone (555) 555-1234	Phone Extension Numbers-only	Fax (555) 555-1234
<input type="text" value="(555) 306-0222"/>	<input type="text"/>	<input type="text" value="(555) 306-0333"/>
Address Information		
Address 1 ?		
<input type="text" value="501 Trainer St"/>		
Address 2		
<input type="text"/>		
City	State/Province	Postal Code ?
<input type="text" value="Fargo"/>	<input type="text" value="North Dakota"/> ▼	<input type="text" value="58104"/>
RP Mailbox		
<input type="text"/>		
<input type="button" value="Cancel"/>	<input type="button" value="Save"/>	

View Summary

Select View Summary. This option displays the users profile in a printer friendly version.

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Action	
View IVF Process	?
View Forms	?
Software Vendor	?
Select Managing Vendor	?
Edit Profile View Summary	?

Home Page—Other Menu Options

Home	Submit Test File	Inbox (1)	FAQ	Contact	Account	Logout (btest)
----------------------	----------------------------------	---------------------------	---------------------	-------------------------	-------------------------	--------------------------------

Home

This option is selected to return the user to the home page where the Profile Summary options are available.

Submit Test File

This option is selected to send a test file. Browse to locate file to send and select Submit.

Inbox

This option is selected to go to the providers Inbox. The provider's inbox contains communication from EDISS to the provider.

FAQ

This option is selected to view the Frequently Asked Questions.

Contact

This option is selected to obtain ways to contact EDI Support Services.

Account

This option is selected to change the user's password, change the security question, manage users, and manage account information.

Logout

This option is selected to log the user out of the Total OnBoarding session.