

# GETTING STARTED WITH EDISS AND TOTAL ONBOARDING (TOB)

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## What is an 'electronic transaction'?

Any type of electronic claim, remittance, claim status or eligibility request and response, etc, is an electronic transaction.

## What forms will be required for EDISS registration now that TOB is effective for most lines of business?

Depending on what your line of business is, new providers will still need to send in applicable forms. Trading Partner Agreement Forms are downloadable from the forms page of [www.edissweb.com](http://www.edissweb.com) or will also be available upon registration through TOB. All required Trading Partner Agreements need to be completed online, printed, signed, and faxed into EDISS at 877-269-1472. Except for the Trading Partner agreement for North Dakota BCBS, all pages of this form need to be signed and mailed in. When EDISS has received the required form, the matching profile will show a form status of received.

## If my billing NPI changes, do I have to send new paperwork and start the setup process with EDISS from the beginning?

Yes, if your billing NPI changes EDISS views this as a new setup. To get setup with your new NPI, go to [www.edissweb.com](http://www.edissweb.com), click on the Total OnBoarding page and view the Provider User Guide which will provide instructions on registering a new NPI.

## Do we need an original signature when enrolling with EDISS and TOB?

The enrollment forms that will be faxed into EDISS will be downloaded through the TOB website. An original signature is not needed since these forms can be faxed over. Just make sure someone in the facility signs the form, not anyone from the Billing Service or Clearinghouse.

## Do Network Service Vendors, such as Ivans or Visionshare, charge for their services?

Yes, both Ivans and Visionshare charge for their connectivity services. For information on their fees, please contact them directly.

## Is connecting through a Network Service Vendor more expensive than using HyperTerminal and a phone modem?

Typically, when you connect to the Bulletin Board System (BBS) through HyperTerminal and a phone modem it is for a short period of time. That usually does not generate a large bill. This does vary from facility to facility though. EDISS recommends checking your long distance fees and comparing them to what a Network Service Vendor might charge.

## What is the cost to use Total OnBoarding (TOB)?

There is no cost for using TOB; it is a free system to all EDISS providers and vendors.

## Does TOB relate to Medicare Provider Enrollment?

No, it is a separate registration process to get set up with EDISS for electronic transactions.

## What is a Submitter ID?

A Submitter ID is a unique identifier that is given to providers by EDISS. Every billing provider who enrolls with EDISS is given a Submitter ID for each NPI number they enroll.

## What is my 7 digit Submitter ID for Total Onboarding?

If you are submitting through EDISS currently, the first 2 digits of the Submitter ID will be your state code followed by 5 numbers. EX. AZ00000. If you are not currently setup with EDISS you don't have a Submitter ID and EDI will assign you one once your profile is setup.

## What do I use to log into TOB?

If you are a new TOB user and have not previously enrolled with EDISS, you need to manually enter all your facility information into TOB, stating "No I do not have a 7 digit Submitter ID".

If you are an existing provider with EDISS, your information is auto loaded into TOB

and you will need to enter in your Submitter ID and matching Tax Identification Number to access your account for the first time. We recommend you view the TOB User Guides located on the [Total OnBoarding page of www.edissweb.com](http://www.edissweb.com).

**When I try to register my NPI, it states we are already on file, and will not let me register. Why is that?**

If your state, or line of business, has been auto loaded into TOB, you will need to be sure you are registering as an existing provider with TOB. If you currently conduct business with EDISS you will need to enter your Submitter ID and corresponding Tax ID to take control of your TOB profile. You will find these steps in the User Guide located on the Total OnBoarding page of [www.edissweb.com](http://www.edissweb.com).

**I submit claims for two companies under one Trading Partner ID; do I register them both separately?**

Each NPI/Submitter ID combination requires entry into TOB separately unless you are part of a Billing Group. If you are unsure if you are a Billing Group, please contact our helpdesk at 1-800-967-7902 for clarification.

**I have established a Billing Group with EDI in the past. Do I need to sign up all of my NPI numbers separately in TOB, or just log in with one of them to take control of my profile?**

Any Billing Group can log in with one NPI/TIN combination included in the Billing Group to register and take control of their profile.

**I bill for a group of doctors. Do I have to enter all of the individual NPI's into TOB, or just the group's NPI?**

Only the group NPI's would be needed in TOB. If you happen to have a solo provider that is not part of a group, that provider would need their NPI in TOB as well.

**As a billing service, do I have to register with TOB as a Trading Partner? How do I do that?**

Billing services are vendors and need to register in Total OnBoarding as a vendor. If you are a billing service that has previously registered with EDISS, your information will already be auto loaded into TOB. You will only need to take control of your profile, and will need an Authorization Code. If you are not currently registered with EDISS you will enroll as a new Billing Service. If you have questions on how to do either of these steps, please contact our help desk at 1-800-967-7902.

## If we are already billing electronically, do we need to reapply through TOB?

Any provider or vendor that has previously been in production with EDISS will be auto loaded into TOB with the matching information on file with EDI. You are only required to log into TOB and take control of your profile. There is no re-application process.

## Will my TOB login password change after a specific number of days?

Your TOB login password should remain constant throughout your usage. However, users have the ability to change their password at any point in time by simply logging in and editing their TOB profile. This option is described in the TOB User Guide found on [www.edissweb.com](http://www.edissweb.com).

## Can multiple Tax Identification numbers be added under one TOB profile?

Yes, profile setups that require this will have the option to add more than one Tax Identification number to the specific profile.

## If we work with two lines of business for one NPI, can these both be added into our profile?

Yes, you would need to select the 'Manage LOB' option to add that line of business into your profile. Additional detailed instructions are located in the TOB user guide on the Total OnBoarding page of [www.edissweb.com](http://www.edissweb.com).

## When I get to my Provider Summary page after registration am I finished with the TOB setup?

No, you will need to go towards the bottom of your profile and select your NPI in blue text. You will need to add the appropriate state to your NPI by selecting Manage Region. You then should add the electronic transactions you wish to sign up for by clicking on the plus icon in the NPI Summary screen. This will allow you to select appropriate transactions.

These steps are also listed in the TOB User Guide found on the Training and Help page of [www.edissweb.com](http://www.edissweb.com).

## Who should be the primary contact for our Total OnBoarding profile?

That decision is up to your facility. EDISS would recommend that whoever handles the electronic transactions for your facility would be a good candidate, but it is ultimately your business decision.

Should we look in our TOB inbox for notifications or the contact email listed in our profile?

Any notifications generated in TOB are sent to both locations.

Which phone number should we enter in the contact information: the number for the facility, or the number for the facility contact person?

The contact number entered in the profile information should be for the main contact person for the facility. If EDISS needed to call or fax the facility for any reason, we will want to speak directly to whoever handles electronic transactions.

What does the IVF process consist of?

All providers that are sending their claims direct to EDISS will need to complete the Identity Verification Form (IVF) process. Once your profile is setup in TOB you will receive an email from Visionshare. This email will contain an IVF form in which you will need to get notarized and mail back to Visionshare (Instructions will be on the form). Once Visionshare receives this form, they will mail you a password for the Digital Certificate. They will also email you a Digital Certificate that you will download to your computer. Once you have downloaded the Digital Certificate the IVF process is complete.

What is VisionShare's role with TOB and is there a fee associated with TOB or VisionShare?

VisionShare Inc. assisted EDISS with designing the TOB application, as well as providing the CMS approved Digital Certificate security and Identity Verification Form process that allows electronic test file submission over the internet.

TOB is free for any user who needs to register with EDISS, or send test claims. If users wish to use VisionShare Inc. as connectivity alternative for sending production claims, that is their business decision. A service agreement between VisionShare and the user would need to be established.

If I submit claims through a billing service or clearinghouse, do I need to complete the Identify Verification Form (IVF) and obtain a digital certificate?

No, in this example your vendor would be responsible to complete the IVF and obtain a digital certificate.

If we already use Visionshare for a connectivity alternative and have a digital certificate, do we need to re-register with them for a new digital certificate?

No, Visionshare is able to work your existing digital certificate into your profile information. It is in your best interest to contact them directly at 612-460-4327 to work through this digital certificate process.

Is a connectivity vendor, or alternative connectivity method, needed for testing with TOB?

No, testing through TOB is completed over the internet. When production status is achieved, dial-up connectivity is required. More information about connectivity can be found on the Training and Help tab of [www.edissweb.com](http://www.edissweb.com).

Can we still send test files through the Bulletin Board System (BBS), or is TOB required for all test file submission now?

The testing BBS will remain open for trading partners who wish to send a test file through it. However, in order to be approved for Production with EDISS, trading partners will be required to pass testing through TOB.

How can I tell if I have to test through my vendor or not?

If you previously were set-up with your vendor in production with EDISS, you will not have to retest at this time. If you are signing up with a new vendor however, your vendor will be required to test on your behalf unless they have Blanket Approval. Your vendor will know if they have Blanket Approval with EDISS, we recommend you ask them for that information.

Is the testing process through TOB different from sending 'live' production claims through the Bulletin Board System (BBS)?

Yes, testing through TOB is conducted through an internet connection. CMS mandates that production claims be sent through a direct modem-to-modem connection. EDISS uses the Bulletin Board System (BBS) to meet this requirement. To learn more about the BBS and production connectivity we recommend you visit the Training and Help tab of [www.edissweb.com](http://www.edissweb.com) and review the related documents.

We have just now submitted a test file. How long will this process take and how do we know the results of the file?

Testing in TOB is real time so your testing results will be in TOB for your review immediately after submission. Once you send in a clean test file, EDISS is notified via email that a clean test file from your facility is in need of review. EDISS will then review the test file, and make the applicable changes to TOB to reflect your newly achieved production status. You will receive email notification upon completion.

Will TOB allow for testing secondary claims if I submit them separate from my primary? Is there anything different that I would need to do?

TOB will allow for Medicare Secondary Payer (MSP) claim testing. Depending if you send your secondary claims, or a vendor does it for you, submission may be handled differently from your primary.

How would we bill crossover claims in TOB? Would we pick a secondary payer in TOB?

TOB will have no effect on crossover claims or how you select a secondary payer for claim submission. These two issues are specific to sending production claims and will not be altered by TOB at this time. TOB is strictly for online registration and testing.

TOB states I need to test for my NPI number when I have been in production with EDISS for over a year, why is that?

If you created your own profile in TOB and were not part of the system auto load, your transactions will be viewed as new to EDISS. If you are currently sending live production claims, contact our help desk and we will correct your profile.

Will TOB take test files created in PC-ACE Pro32?

Yes TOB will accept claims created in PC-ACE Pro 32. TOB will accept any test file that is in ANSI X12 format.

How do I sign up for PC-ACE Pro32 through TOB?

If a direct transaction is selected in your profile, you will be asked to verify use of PC-ACE Pro32. If yes, the Software License Agreement can be accepted in TOB, and you will receive the appropriate passwords for downloading and accessing the program via email.

## If I submit claims directly to EDISS, should I select a managing vendor?

If you submit directly to EDISS, you would not need to select a managing vendor. A managing vendor is used when a provider does not want to handle their own profile, or any changes associated with it. A provider would only be required to create a login and password to access their profile. After that step, profile control can be passed to the managing vendor such as a Billing Service or Clearinghouse. Providers may log into TOB at any point to add or remove managing vendor rights.

## Does my vendor have a choice to be my managing vendor or not?

Yes. We recommend you contact your vendor to see if they will handle the Managing Vendor responsibilities for you. Some vendors may consider this an additional service outside of their contractual obligations.

## If our vendor is not our Managing Vendor, should we handle all profile updates?

Yes, if you do not have a Managing Vendor you are in charge of all changes to your profile.

## If I submit claims through a Clearinghouse, do I still need to take control of my TOB profile?

All providers need to take initial control of their profile to establish account information within TOB. This will be vital when TOB is used for the 5010 HIPAA transition.

## Our vendor is not on the vendor listing, does this mean they have not signed up for TOB?

Yes, more than likely this means your vendor has not taken control of their TOB profile. We recommend that you contact them and let them know they will need to complete this step before any of their customers will be able to select them. If they have additional questions they can contact EDISS directly at 800-967-7902

## Can a provider add in a software vendor in TOB if they are not found on the selection list of software vendors?

This would be the software vendor's responsibility. You may select 'other' as your software choice in the meantime. Once your software vendor adds in their information into TOB, they will be listed as a valid selection and your profile can be adjusted to represent this choice.

If I send claims through Direct Data Entry (DDE) and receive my remits hard copy, should I still sign up for Total OnBoarding?

Yes. TOB registration still should be completed so you are in control of your EDISS profile and ready for future changes, such as the HIPAA 5010 transition or if you decide to receive remittances electronically. If there is no possibility your facility would ever use EDISS for any electronic transaction, then you can disregard Total OnBoarding at this time.

We are a Medicare Part A provider, when I log into TOB I do not see where to add the 835 Electronic Remittance transaction?

You have the option to update any transaction under "manage transactions" under your profile information. Managing Transactions allows for addition, removal, or adjustment to all applicable transactions for your line of business. Please review the TOB User Guide for further direction on how to perform this operation.

We only send 10 Medicare claims per month, should we still register for TOB?

If you are submitting claims on paper you will not need to register for TOB.

How will I send my Production claims that I need to bill for payment?

If you are currently billing live production claims, your submission method will not change.

Has there been changes to how production claims are sent into EDISS since TOB has started?

No, if you are currently are set up in production for any electronic transaction with EDISS, there is no change in how these are handled. More information about production interaction can be found on the Training and Help tab of [www.edissweb.com](http://www.edissweb.com).

If we are only billing once a year for flu shots and they are by roster billing, how much of the TOB do we need to do?

TOB is for provider profile management and online testing. Since you are currently in EDISS's production system for submitting these claims, you will only need to take control of your provider profile in TOB and use it for any changes or updates that may occur. If new claim types are added that require testing, then you, the facility, would need to test through TOB as well.