State of West Virginia Offices of the Insurance Commissioner (WVOIC)

Trading Partner Profile Registration Instructions

Revised Date: 6/16/2020

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Overview:

This WVOIC EDI Trading Partner Profile Registration provides each trading partner with the ability to create and submit a New Profile or an Updated Trading Partner Profile. This form will uniquely identify a trading partner as the sender of the data, how the data will be sent, the business & technical contacts, and the demographics for the Insurers and Claim Administrators.

Upon *completion* of the EDI Trading Partner Profile online, an auto response email will be sent to the primary contact and to the WVOIC. This will serve as notification to all parties of the EDI Trading Partner information for WVOIC EDI. Please see the email example in the WVOIC Trading Partner Profile Registration Email Example section at the end of this document.

Upon *approval* of the EDI Trading Partner Profile by the WVOIC, the EDI Support Team will contact the contacts to indicate when the profile or profile update will become effective for EDI reporting.

The following provides information for accessing and completing a NEW or UPDATED WVOIC EDI Trading Partner Profile.

Accessing and Creating an Account for the Trading Partner Profile:

In order to access and complete a Trading Partner Profile, the Trading Partner will need to sign into ISO's Trading Partner Registration system (if previously registered).

If this is the *first time* accessing the ISO's Trading Partner Registration system, create an account by clicking on the 'Get Started' button. Once the 'Get Started' button is selected, enter your e-mail address and choose a password for your new account.

After your account has been created, a message will be sent to the specified e-mail address from: www-data@wccapture.com with an activation code to activate your account. Once the activation code is obtained, enter the code in the 'Activation Code' box and click 'Continue'.

Once signed in the Trading Partner will have the option to create a new profile if it's the first time or update a previously submitted profile. Any previously submitted Trading Partner would be available on the below screen:

The Trading Partner Profile Registration system is made up of the following sections (shown on right) which will be explained in the How to complete a New WVOIC FROI/SROI EDI Trading Partner Profile section below:

How to complete a New WVOIC FROI/SROI EDI Trading Partner Profile:

To create a New Profile, click on the 'Create New Profile' button.

Required fields are indicated throughout the instructions in bold formatting. Upon clicking on the 'Continue' button or 'Next Page' button, any required fields that are not completed will be noted with a red box around the required field.

When filling out the profile, if you see a reference to a DN, e.g., Insurer Name (DN0007), this will indicate that the information requested is a Data Element (DN) that is part of the Claims EDI report and will be reported to WVOIC in EDI reports.

1. EDI Sender:
   This section provides identifying information about the Master Trading Partner (Sender).
   - **Sender Master FEIN:** Enter the Federal Employer Identification Number (FEIN) of your business entity. Please enter 9 digits with no punctuation.
   - **Sender Postal Code:** Enter the Postal Code (Zip+4) of your business entity. Please enter 9 digits with no punctuation. Once Sender Master FEIN and Sender Postal Code fields are populated click on 'Continue'.
   - **Company Name:** Enter the Company Name of the EDI Sender. The Company Name should be the entire name as listed on any licensing/registration applications filed with the WVOIC and not an acronym.
   - **Group FEIN:** This will be automatically populated with the Sender Master FEIN entered in the previous screen. Group FEIN will be utilized to allow a sender/company that purchased another company to be able to update the Claim Admin FEIN, etc. on a given claim in the same group even though they will have a different Sender ID (FEIN/PC).

Note: Sender Master FEIN and Sender Postal Code should be the same as those that the Trading Partner will use as the Sender ID (DN0098) in the Header Record of all its EDI transmissions. Once the Company Name is populated and the Company Type is selected, click on 'Next Page'.
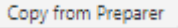
2. Preparer Contact Information:
   This section provides identifying information about the person completing the EDI Trading Partner Profile.
   - **Preparer Name:** Enter the contact name of the person completing the EDI Trading Partner Profile.
   - **Preparer Job Title**: Enter the preparer's job title.
   - **Preparer Address, City, State,** and **Zip:** Enter the preparer's address.
   - **Preparer Phone** and Fax: Enter the preparer's phone and fax number.
   - **Preparer Email:** Enter the preparer's email address.

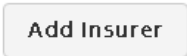3. Primary/Secondary Contact for EDI Implementation/Setup:
   This section provides the ability to identify individuals within your business entity who can be used as the main contacts for this trading partner profile. Two types of contacts should be identified: one for business practices and issues, and one for technical issues. Enter the information below for both

a business and technical contact that is the main contact for your company. In the event there is any communication on the EDI reporting, claims, requirements, etc., these contacts will be notified. The first contact entered will be the primary contact. If the primary contact is the same as the preparer, click on the 'Copy from Preparer' button: [Copy from Preparer]
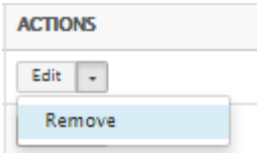
- Contact Name: **First**, Middle, **Last,** Suffix
- Job Title: **Contact's Job Title**
- Contact **Address Line 1,** Address Line 2, **City, State, Zip**
- Contact **Phone, Fax**, **Email**

4. Insurer(s):
This section of the form identifies the trading partners using this Sender to transmit data electronically to the WVOIC. At least one Insurer is required for a new trading partner profile. If the Sender is also an Insurer, add an Insurer with the Sender's information. If there is more than one Insurer, complete an Insurer section for each one. Provide the full Insurer Legal Name (DN0007), Insurer FEIN (DN0006) and Insurer Type for each Insurer (Insurer or Self-Insurer) for whose claims the Sender will be transmitting data. WVOIC will notify the Sender of any discrepancy between the identifying information entered and the WVOIC's present records. This list will be used to reconcile identification tables, and it will be used as part of the edit on Insurer FEIN to match the WVOIC's database. Complete an UPDATED WVOIC EDI Trading Partner Profile to add or remove subsidiaries.

[Add Insurer] : This button is used to allow you to access the entry to add new Insurer on a NEW or UPDATED EDI Trading Partner Profile.

[ACTIONS / Edit / Remove] : This button is used to allow you to remove the last Insurer that was entered during the current EDI Trading Partner Profile submission.

A. To 'Add an Insurer':

- Click on the 'Add Insurer' button
- Enter the applicable Insurer information. Required fields are highlighted in red below; Insurer FEIN, Insurer Name and Insurer Type:

Insurer

Action Date	05/20/2020
Insurer FEIN	DN0006
	Required field
Insurer Name	DN0007
	Required field
Insurer Type	
	Required field

[Save Changes] [Cancel]

B. To continue 'Adding Insurers':

- Click the 'Add Insurer' button again, otherwise proceed to the Add Claim Administrator(s) section.
- By clicking 'Add Insurer' another Insurer entry will be presented (# 2 in this case). Complete the required information and repeat the process to add the Self-Insurer until completed, and then move to the Claim Administrator section.

C. To remove the last Insurer entered during the entry of the profile:

- Click on the downward arrow alongside the 'Edit' button in the Action column of the Insurer and select 'Remove'.

- Once selected, then a confirmation message appears such as the following (using above example):

- Then to confirm you wish to delete this entry just added, click on the 'Delete Insurer' button and the entry that has not been submitted previously, (i.e. was just added when editing), then is deleted.

5. <u>Filing Method:</u>
   At least one method required.

   - **EDI Vendor:** If you are using an EDI Vendor to submit your EDI reporting, complete this section. First click the 'radio button' beside EDI Vendor. Then enter the Vendor Company Name: Enter the Vendor's Company Name.
   - **Jurisdiction Web Entry**: Select Jurisdiction Web Entry if Sender will not be using an EDI Vendor and will be reporting reports manually using the Jurisdiction's Vendor Web Entry system.
   - **Direct SFTP:** Select Direct SFTP if Sender will be exchanging EDI files directly with the WVOIC's vendor using SFTP.
   - Once the filing method to file EDI Claims to WVOIC for your company is selected, then enter the following information:
           Contact Name: Enter the Vendor's Contact Name.

           Phone: Enter the Vendor's Phone Number.

           Email: Enter the Vendor's Email Address.

6. <u>Comments:</u>
   Please include any comments in this section. Clicking on 'Next Page' will direct you to the 'Submit Profile' section.

Comments

[text area]

Save Changes   Next Page

7. <u>Submit the WVOIC EDI Trading Partner Profile:</u>

The 'Submit Profile' button from the Submit Profile section must be clicked on in order to submit the trading partner profile. An email confirmation will be generated per the example in the WVOIC Trading Partner Profile Registration Email Example section of this document. WVOIC will respond via email on confirmation and approval of the WVOIC EDI Trading Partner relationship.
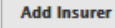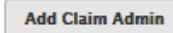
Submit Profile

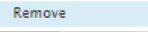**How to Update an Existing WVOIC FROI/SROI EDI Trading Partner Profile:**

To update a previously submitted Trading Partner Profile, select the 'Update' button in the "Actions" column of the Trading Partner Profile to be updated:
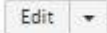

A. To Update Insurers or Claim Administrators:

There are 3 options for updating Insurers (Insurer Section) and/or Claim Administrators (Claim Administrators Section) within the EDI Trading Partner Profile Update:

- Click the 'Add Insurer' button: **Add Insurer** to add a new Insurer or click on the 'Add Claim Admin' button: **Add Claim Admin** to add a Claim Administrator to your EDI Trading Partner Profile (one that has never been added or was added and removed).

- Click on 'Remove': **Remove** (drop-down of the 'Edit' button) then click on 'Mark Inactive': **Mark Inactive**, to set an Insurer or Claim Administrator from your EDI Trading Partner Profile that has been submitted to the WVOIC previously as inactive.

- Click on the 'Edit' button: **Edit** to update the Insurer or Claim Admin entry fields previously submitted to the WVOIC.

- Once all updates necessary are completed, submit the profile update by selecting the 'Submit Profile' button: **Submit Profile** in the Submit Profile Section.

B. To Update Additional Sections of the Trading Partner Profile:

To update any of the other sections (EDI Sender, Preparer Contact Info, Primary Contact Info, Secondary Contact Info, and Filing Method) select the corresponding section and update the fields that need to be updated. Then provide a comment of any additional changes made in the Comments section.

- Once all updates necessary are completed, submit the profile update by selecting the 'Submit Profile' button: **Submit Profile** in the Submit Profile Section.
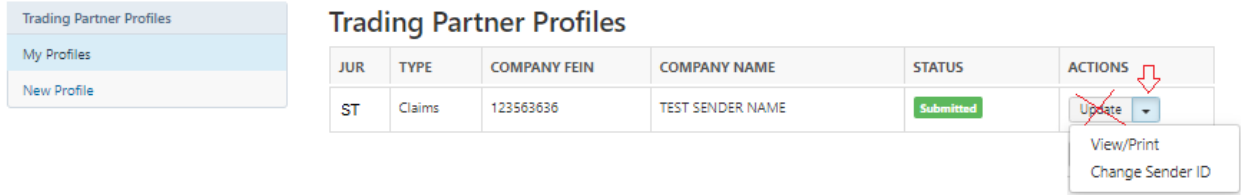
C. To Change Sender ID:

      There is an option available to update any portion of the Sender ID (Sender FEIN or Sender Postal Code) of a previously submitted Trading Partner Profile.
Click on 'Change Sender ID' (drop-down of the 'Update' button) and you will be redirected to the Sender ID section where you may edit either the Sender FEIN or Sender Postal Code.

Trading Partner Profiles	
My Profiles	
New Profile	

Trading Partner Profiles

JUR	TYPE	COMPANY FEIN	COMPANY NAME	STATUS	ACTIONS
ST	Claims	123563636	TEST SENDER NAME	Submitted	Update ▾

View/Print
Change Sender ID

This will create a New Trading Partner Profile as it would be considered a New or different Sender.

Note: If all updates made to the existing Trading Partner Profile need to be canceled, in the Submit Profile section, select the 'Cancel Updates' button: **Cancel Updates** .

WVOIC Trading Partner Profile Registration Email Example

Upon **completion** of the EDI Trading Partner Profile online, an auto response email will be sent to the primary contact and to the WVOIC. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Below is an example of the WVOIC EDI Trading Partner Profile registration. The information that is completed on the profile will be included in the email.

-----Original Message-----
From: www-data@wccapture.com [mailto:www-data@wccapture.com]
Sent: Thursday, June 18, 2020 2:34 PM
To: oicwvediregis@wv.gov
Cc : *Preparer's Email; Primary Contact's Email here, Secondary Contact's Email here, Filing Method Contact's Email Here*
Subject: EDI New Profile WV - *Your Company's Name here*

-----Original Message-----

-- Claims Electronic Data Interchange Profile --
Jurisdiction: WV
EDI Profile: New

-- EDI Sender/Receiver (Primary Insurer/TPA) –
Company Name: Sender Trading Partner Name
Master FEIN: 968596859
Postal Code: 123451231
Group FEIN: 968596859

-- Preparer Contact Information --
Preparer Name: Sandy Smith
Preparer Title: Associate Claims Handler
Preparer Addr 1: 123 Business Drive
Preparer Addr 2:
Preparer City: Jersey City
Preparer State: NJ
Preparer Zip: 07030
Preparer Phone: 123-456-9688
Preparer Fax: 123-334-96857
Preparer Email: prepareremail@company.com

-- Filing Information --
Filing Method: EDI Vendor
Vendor Company: EDI Vendor Name
Vendor Phone: 123-456-7890
Vendor Email: example@vendor.com

-- Primary Contact for EDI Implementation/Setup --
Primary Contact Name: John Smith
Primary Contact Title: Business Systems Analyst
Primary Contact Addr 1: 123 Example Ave
Primary Contact Addr 2:
Primary Contact City: Jersey City
Primary Contact State: NJ
Primary Contact Zip: 07310
Primary Contact Phone: 123-456-7890
Primary Contact Fax: 123-456-7891
Primary Contact Email: example@company.com

-- Secondary Contact --
Secondary Contact Name: Maria Johnson
Secondary Contact Title: Technical
Secondary Contact Addr 1: 123 Example Ave
Secondary Contact City: Jersey City
Secondary Contact State: NJ
Secondary Contact Zip: 07310
Secondary Contact Phone: 123-456-7895
Secondary Contact Fax: 123-456-7887
Secondary Contact Email: secondarycontact@company.com

-- Insurers --

-- Insurer (1) --
Action: Add
Insurer Status: Active
Insurer FEIN (DN0006):   123456789
Insurer Name (DN0007):   Example Insurer 1
Insurer Type: Insurer

-- Insurer (2) --
Action: Add
Insurer Status: Active
Insurer FEIN (DN0006):   998557744
Insurer Name (DN0007):   Example Insurer 2
Insurer Type: Insurer

Comments: