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NEHEN 5010 Deployment Plan

April 25, 2011



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Release Schedule Overview

- NEHEN 2011.1 & 2011.2 releases include support for 5010 compliance :

5010 compliance releases

Release	General Release	Type	Notes
eGatewayADX 12.7	No longer available	Test environment only ¹	Routing and validating for all 4010 and 5010 HIPAA transactions supported by NEHEN. (beta test completed)
eGatewayCDX 2011.1	Summer 2011	Production	Includes clinical summary, immunizations, lab results, syndromic surveillance messaging.
eGatewayADX 2011.1	4/29/11	Test environment only ¹	Updated to address issues reported from 12.7 testing and adds additional tools and utilities ,including web-based Configurator.
Express 2011.1	4/29/11	Test environment only ¹	Introduces new screen layouts and high priority HIPAA transactions for 5010 testing, including Eligibility, Claim File Submission and Routing, and Claim Status Inquiry.
eGatewayADX 2011.2 NEW	10/31/11 (Beta avail 9/2/11)	Production ²	Updated to address issues reported from 2011.1 testing plus additional features.
Express 2011.2 NEW	10/31/11 (Beta avail 9/2/11)	Production ²	Updated to address issues reported from 2011.1 testing. Adds remaining HIPAA mandated transactions supported by NEHEN for 5010 testing as well as tools and utilities, including Configurator and Payer-Specific Rules.
eGatewayERX 2011.1	10/31/11	Production	Updated for 5010 eligibility compliance.

- 1 Pre-release for 5010 Level II Compliance Testing
- 2 Complete Beta Test prior to general release



Deployment Approach – Support

- **NEHEN realizes that comprehensive, well organized deployment support is a critical factor in the successful implementation of a new release, especially when the production deadline is mandated for compliance reasons. We have planned an approach that allows each member site to schedule an installation date with NEHEN to ensure that appropriate support resources will be available.**
- **Each NEHEN member will have a specific support analyst to work with:**
 - In advance to confirm the site's readiness and download of the correct deployment materials
 - During the installation and configuration to answer installation and configuration questions, coordinate training requests, or access technical help promptly when needed
 - Post-installation to support software and compliance testing and assist with migration to production.

Deployment Approach for 2011.1 Release

(available for testing 4/29/11)

- **NEHEN member sites may begin installation and configuration of the NEHEN Express 2011.1 and eGatewayADX 2011.1 pre-releases in their test environments starting the first week in May.**
 - NEHEN will schedule installation and configuration support first for member sites that are ready to begin 5010 Level II compliance testing
 - The first group of sites must also commit to work with NEHEN to field test the NEHEN software and provide feedback regarding deployment materials
 - Once this first group has completed installation and started testing, NEHEN Express 2011.1 and eGatewayADX 2011.1 pre-release installations may be scheduled by other NEHEN members as they become ready to participate in initial 5010 Level II compliance testing with their trading partners

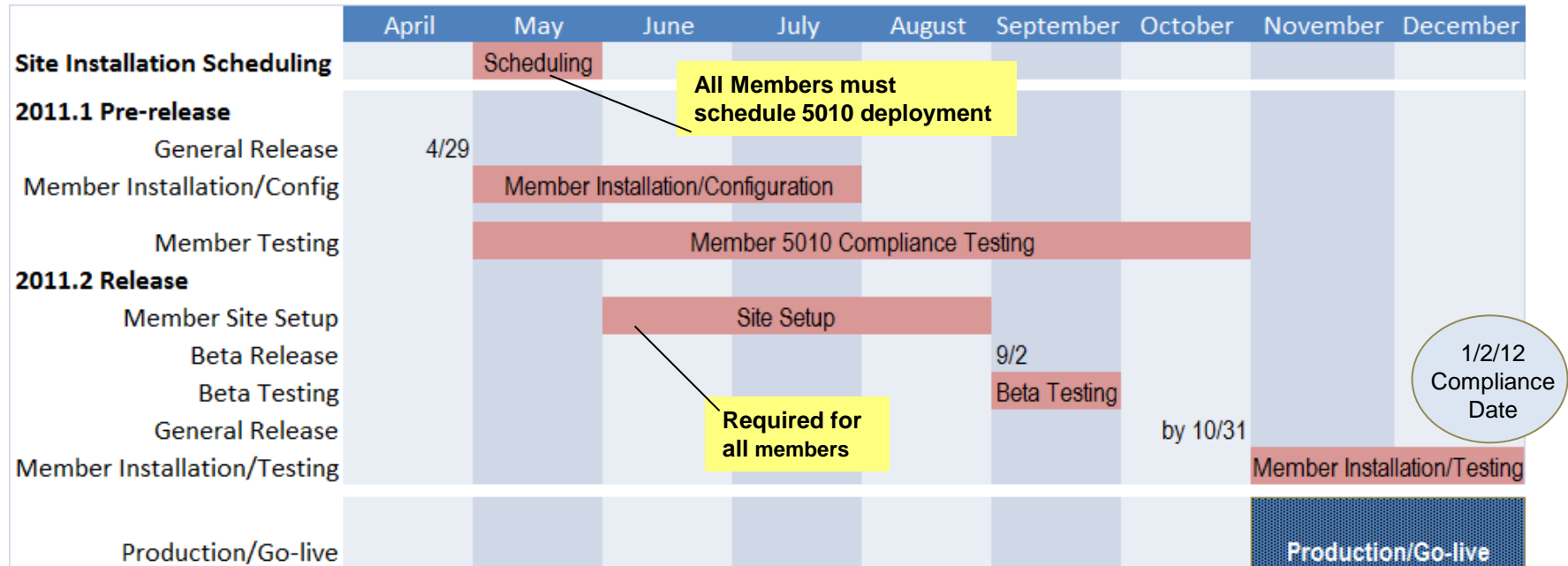
Deployment Approach for 2011.2 Release

(available for Beta testing - 9/2/11, general release by 10/31/11)

- **NEHEN's revised release schedule includes complete, full-functionality 2011.2 beta test releases of both Express and eGatewayADX on September 2, 2011.**
 - Only NEHEN member sites that already have installed, configured and tested with NEHEN Express 2011.1 and eGatewayADX 2011.1 may become beta sites.
 - As each beta site completes their testing, they may migrate the Express 2011.2 and eGatewayADX 2011.2 releases into production, incorporating any beta test patches deemed necessary for their production operation.
 - Production releases of Express 2011.2 and eGatewayADX 2011.2 will become available to the entire NEHEN community upon completion of NEHEN's beta testing program and incorporation of any resulting patches, no later than October 31, 2011.
 - NEHEN will work with each site to schedule installation and configuration support.

Member Activities & Key Dates

- **5/2/11 - 6/3/11**
 - All members contact NEHEN to schedule their site-specific 5010 deployment (5010@nehen.org)
- **5/2/11 - 7/1/11**
 - All members review and fill-out the Site Admin Preparation Checklist
 - All members complete 5010 site preparation
- **9/2/11 - 10/31/11**
 - Beta sites install & test 2011.2 release (successful 2011.1 testing must be completed to become a 2011.2 beta site)
 - Beta sites can migrate to production once they satisfactorily complete internal testing with 2011.2
- **11/1/11 - 12/30/11**
 - All members complete installation, testing and migration to production with 2011.2



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5010 Deployment Materials



Deployment Materials Summary

(To be published on Members-Only section of nehen.org)

- **Site Admin Preparation Checklist**

- Prior to installing each new release, there is some data which your Site Admin or NEHEN Support will need. This checklist will help you gather the appropriate information to ensure the installation goes smoothly

- **Site Admin Guides**

- Basic troubleshooting information for eGatewayADX, Scheduler and Express are included
- Instructions for “How do I?” type questions will be included. NOTE: These will not be site specific instructions
- These guides may be updated periodically as NEHEN Support identifies new troubleshooting items during the testing phases

- **User Guides**

- User Guides for the eGateway Configurator as well as NEHEN Express are included

- **Release Notes**

- Separate documents will be delivered for eGatewayADX and Express
- Summary of the features and functions included in the release
- Summary of Known Issues and possible Workarounds
- Will reference other Deployment Materials as needed

Deployment Materials Summary, continued

- **Installation Materials**

- InstallShield will be used for the installation of eGatewayADX, the eGatewayADX Configurator and Express
- Complete, step-by-step instructions will be provided to walk you through the Installation process

- **Configuration Materials**

- Due to the new eGatewayADX and eGateway Configurator, getting your system up and running the first time will be a completely new process. The following documents will guide you through this new process.
 - *Database Load & Configuration Instructions: How to set up and load multiple databases, schemas, tables, stored procedures and views*
 - *Workflow Configuration Instructions: How to set up the Workflows that eGatewayADX uses to determine how to process and route the various transactions it handles; these must be set up before using eGatewayADX or Express*
 - *MSMQ Instructions & User Guide: How to get up and running with Microsoft MSMQ, used to view your transaction queues*
 - *Jobs to Scheduler Conversion Guide: How to convert current jobs to use the new Scheduler*
 - *4010 GenMap Conversion Guide: How to convert the 4010 generic maps*

5010 Resources

- **More Information**

- Visit 5010 Resources page on the NEHEN website

- <http://www.nehen.org/support/5010.aspx> for additional information such as:

- FAQ
 - Hardware/Software Requirements
 - Links to NEHEN Payer 5010 specific online resources

- **Contact Us**

- 5010@nehen.org



Appendix

What's In 2011.1
NEHEN Services /Adoption
Who to Contact



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2011.1 – What's in? What's Out?



General Points & Disclaimers

- **Express 2011.1 and eGatewayADX 2011.1 are complete re-writes of the existing tools. NEHEN encourages you to review all functionality and documentation.**
- **Functionality not explicitly mentioned as 'In' 2011.1 may not be included. If there are specific items you as an organization are interested in that you do not see, please check with NEHEN for the status.**
- **NEHEN Management is in the process of refining the release schedule for 2011.2, information will be released as soon as it is finalized.**
- **The 2011.1 release is intended for testing only, it is not production ready. Performance should not be measured against production requirements. However major discrepancies should be brought to the attention of the NEHEN Support team.**
- **See the NEHEN Hardware, Software, and Telecommunications Requirements document found within the Support & Resources section of www.nehen.org for current environment requirements.**
- **Deployment Documentation and User Guides will be provided and will be specific to the content of the 2011.1 release.**

What is included in Express 2011.1?

Yes you can ...

✓ **Eligibility:**

- ✓ Process HIPAA-compliant Eligibility Inquiry transactions in either 4010A1 or 5010A1 format (depending on the setup of the Payers)
- ✓ Send Eligibility transactions to payers using the following modes: Individual, Self-Pay, Single Payer Mini-batches and Big Batches (if proper setup has been completed)
- ✓ Search for and View old (pre 2011.1) Response transactions

✓ **Claim Status Inquiry:**

- ✓ Process HIPAA-compliant CSI transactions in either 4010A1 or 5010 format (depending on the setup of the Payers)
- ✓ Send CSI transactions to payers using the following modes: Individual, Single Payer Mini-batches and Big Batches (if proper setup has been completed)
- ✓ Search for and View old (pre 2011.1) Response transactions

**** The 2011.1 Release is not intended for Production. This is a test-only release.**

What is included in Express 2011.1?

Yes you can ...

✓ **Claims:**

- ✓ Upload 4010A1 or 5010A1 claim files for validation, tracking and submission to the payer via the Express UI
- ✓ Submit claim files to the eGatewayADX for processing
- ✓ Validate the contents of the uploaded 5010A1 837 file in real-time via the Express UI
- ✓ Validate the contents of a 5010A1 837 file submitted via the eGatewayADX for processing
- ✓ View response transactions (997, 999, Submitter Reports and 277CA Acknowledgements) received from payers for submission of claim files

✓ **Non-Transaction Specific:**

- ✓ Access details of transactions in the database rather than the file server

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What is included in eGatewayADX 2011.1?

Yes you can ...

✓ eGatewayADX:

- ✓ Send, receive and validate the errata (A1) version of transactions when appropriate via the eGatewayADX (*i.e. from Integrated Nodes*)
- ✓ Use the new eGateway Configurator to manage and maintain your eGatewayADX and transaction routing
- ✓ Send and Receive transactions using the following connection types: TCP/IP, FTP, SFTP, HTS, HTTP, Web Services
- ✓ Use the Scheduler to handle the sending and receiving of either 4010 or 5010 version, non-real time transactions

✓ eGateway Configurator:

- ✓ Define and maintain your Trading Partners
- ✓ Define the Adapters being used
- ✓ Define the Workflows for processing a certain transaction
- ✓ Use the Logs to find and troubleshoot specific transactions, view detailed error messages and warnings
- ✓ Setup the Schedule for when certain Workflows will run

- Is the Trading Partner a Payer or a Provider?
- What is the application sending/receiving the transaction?
- What is the transaction type & version?

- What is the type of connection?
- What is the protocol?
- What is the standard number of retries?
- Which port(s) or URL are to be used?

- What Actions or steps are included in the Workflow?
- What should happen if an Action fails?

- What did the X12 look like before and after a questionable Action?
- Are the Adapters able to connect to Payer A?

- What days should the Workflow run? Daily? Weekends Only? Specific days of the week?
- What time of day should the Workflow run? Overnight? During the day? All day?
- How frequently should the Workflow be started? Every 10 minutes? 90 minutes? 720 minutes?

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What is NOT included in Express 2011.1?

No you cannot ...

- Process 5010 Compliant Referral/Authorization transactions (278R, 278I or 278N)
- Process & View 5010 Compliant Remittance Advise transactions (835)
- Create 5010 Compliant Professional claims via the Direct Data Entry (DDE) module
- Process & View 999 Acknowledgement transactions received for real-time transactions
- Create and Send Multi Payer Mini Batch transactions (Eligibility & Claim Status)

Why not?

- This functionality will be available with Express 2011.2
- This functionality will be available with Express 2011.2
- This functionality will be available with Express 2011.2
- This functionality will be available with Express 2011.2
- This functionality will be available with Express 2011.2 for 5010 payers only.
NOTE: Multi Payer Mini Batches in 4010 mode will no longer be supported.

**** The 2011.1 Release is not intended for Production. This is a test-only release.**

What is NOT included in Express 2011.1?

No you cannot ...

- Generate valid reports using the Reporting Module
- Fix errors identified in uploaded Claim or Mini Batch files via the UI
- Use the User Management and Administration menu options to completely setup and manage your Accounts and Express Users

Why not?

- This functionality will be available with Express 2011.2
- For various performance reasons, this functionality is being removed from the UI. Users must make the correction in the source file and re-upload.
- The existing NEHEN Configurator and Account Configurator functionality will be integrated Express 2011.2.

**** The 2011.1 Release is not intended for Production. This is a test-only release.**

What is NOT included in eGatewayADX 2011.1?

No you cannot ...

- Use the existing Control Panel to monitor the health of the eGatewayADX or Connections
- Use the existing NEHEN Configurator tool to manage and maintain the routing of transactions via the eGateway
- Use the FTP Complete message during batch processing

Why not?

- This functionality will be available with the eGatewayADX 2011.2
- The existing NEHEN Configurator tool is being phased out. eGatewayADX will be maintained using the new eGateway Configurator. *NOTE: You must continue to use your existing NEHEN Configurator to manage any previous versions of the eGateway*
- This has been replaced by the improved Scheduler Service

**** The 2011.1 Release is not intended for Production. This is a test-only release.**



NEHEN Services / Adoption



Administrative Data Exchange Services

Payer	Eligibility Verification	Claim Submission	Claim Status Inquiry	Remittance Advice	Referral Authorization ¹	Referral Inquiry	Admission Notification
BCBSMA	✓ ²	✓	✓	✓	✓ ³	✓	
Harvard Pilgrim Health Care	✓	✓	✓	✓	✓ ³	✓	✓ ⁶
Tufts Health Plan	✓	✓	✓	✓	✓	✓ ⁷	
BMC HealthNet	✓	✓	Planned	✓			
Fallon Community	✓						
Health New England	✓	✓	✓	Planned			
Neighborhood Health Plan	✓	✓	✓	✓	✓		
Network Health	✓	✓	Ready to test	✓			
Aetna	✓	Planned	✓	Planned			
Anthem / UniCare	✓	Planned	Planned	Planned			
BCBSNH	✓	✓ ⁴					
BCBSRI	✓	✓ ⁴					
CIGNA	✓	Planned	✓				
ConnectiCare	✓						
Oxford	✓	Planned	✓				
United	✓	Planned	✓				✓
Medicaid – MA (MassHealth)	✓	✓	✓	✓			
Medicaid – RI	✓	✓ ⁴					
Medicare ⁵	✓	✓	Planned	✓			
TRICARE	✓						

¹ Includes specialty care, outpatient authorization and admission pre-certification

² Includes access to out-of-state Blue Cross Blue Shield plans

³ Also includes home health

⁴ Available on request; may require custom interface

⁵ For beneficiaries in jurisdictions serviced by National Heritage Insurance Co. (NHIC); other regions / MACs available on request

⁶ Supported via Authorization Pre-Certification request

⁷ Specialty care only



Clinical Data Exchange Services / Adoption

Participant	Clinical Summaries ¹		Lab Results ²		Immunizations ³		Syndromic Surveillance ⁴	
	Send	Receive	Send	Receive	Send	Receive	Send	Receive
Atrius Health	Planned						Planned	
Beth Israel Deaconess	✓	✓						
BI Deaconess – Needham								
Children’s Hospital	✓	✓			Planned			
Fallon Clinic					Planned			
Mount Auburn Hospital								
Mass. Eye & Ear Infirmery	Planned	Planned						
New England Baptist		Planned						
Northeast Health System		✓						
Partners HealthCare	Planned							
Signature Health	Planned	Planned						
Tufts Medical Center								
Winchester Hospital	Planned	Planned						
Boston Public Health Comm.		5				Planned		
Mass. Dept. of Public Health				Planned				
Mass. eHealth Collaborative		6						
Network Health								

¹ HL7 CDA R2 CCD, HITSP C32

² HL7 2.5.1, LOINC

³ HL7 2.5.1, CVX (as specified by CDC)

⁴ HL7 2.5.1

⁵ For health equities analysis

⁶ For quality measurement and reporting

Legend:

✓ Production

Testing

In design / development



E-Prescribing / Medication Data Exchange Services

Participant	Pharmacy Benefit Eligibility Verification ¹	New Rx (Mail and Retail) ²	Pharmacy-Initiated Renewal (Retail) ²	Formulary ³	History ²
Surescripts ⁴	✓	✓	✓	✓	✓
Beth Israel Deaconess	✓	✓	✓	✓	✓
Mass. Eye & Ear Infirmary	✓	✓		✓	✓
Partners HealthCare	✓	✓		✓	✓
Harvard Pilgrim Health Care ⁵	✓			✓	Planned

¹ ANSI X12 270/271

² NCPDP SCRIPT 8.1 EDI

³ NCPDP Formulary and Benefits 1.0

⁴ Provides routing and processing for most regional and national PBMs and payers, including BCBSMA and Tufts Health Plan, among others locally

⁵ Does not participate through Surescripts, requires additional development for Medicare data and Partners connectivity



Who to contact

Service / Function	Point of Contact	Escalation Contact
Schedule 5010 Installation	5010 Support Analyst 5010@nehen.org 781-290-1490	
Administrative Exchange (ADX) Release	Rebekah McLearn rmclear@csc.com 781-290-1471	Dave Bowditch dbowdite@csc.com 781-290-1276
ADX Support & Implementation	Support Analyst NEHEN_Support@csc.com 781-290-1490	Bonez Dupre bdupre@csc.com 781-290-1255
Clinical Exchange (CDX) Release	Dan Kearney dkearne2@csc.com 902.441.9347	Betty Weiss bweiss3@csc.com 781-290-1486
CDX Support & Implementation	Steve Fraser dfraser9@csc.com 972-964-3217	Betty Weiss bweiss3@csc.com 781-290-1486
ePrescribing (eRX) Support	Support Analyst NEHEN_Support@csc.com 781-290-1490	Bonez Dupre bdupre@csc.com 781-290-1255
Member Relations & new products	Chris Giancola chris.giancola@csc.com 781-290-1687	Sira Cormier scormier@csc.com 781-290-1300
Business Operations & organizational governance	Sira Cormier scormier@csc.com 781-290-1300	Betty Weiss bweiss3@csc.com 781-290-1486



www.nehen.org www.nehennet.org

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