DLT Department of Labor and Training
RHODE ISLAND

Trading Partner Profile (TPP) Registration Instructions

Revised Date: 6/18/2020

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Overview:

RIDLT's EDI Trading Partner Profile (TPP) Registration System provides each Trading Partner with the ability to both create a new TPP and update an existing TPP. An EDI TPP uniquely identifies a Trading Partner as the sender of data, and documents (1) how the data will be sent, (2) the Primary and Secondary Contacts, and (3) the Insurer and Claim Administrator demographics.

Upon *completion* of an EDI TPP, an auto-response email will be sent to both the Primary Contact and RIDLT. This will serve as notification to all relevant parties that there is an EDI TPP request pending implementation. A example of the auto-response email can be found in the RIDLT Trading Partner Profile Registration Email Example section.

Upon *approval* of an EDI TPP by RIDLT, ISO's EDI Support Team will notify the Primary Contact regarding when the profile will become effective for EDI reporting.

The following documentation guides the end-user through accessing and completing a NEW or UPDATED RIDLT EDI TPP.

Creating and Accessing a Trading Partner Profile (TPP) Account:

All Trading Partners must sign-in to ISO's Trading Partner Registration System to create and update TPPs.

If this is the *first time* accessing RIDLT's EDI TPP Registration System, create an account by clicking on the 'Get Started' button, and entering both your e-mail address and desired password for your new account.

After your account has been created, a message will be sent from www-data@wccapture.com to your account's specified e-mail address. This email will contain an activation code for activating your RIDLT EDI TPP account. Enter the activation code in the 'Activation Code' box and click 'Continue'.

Sign In

Username	
Password	

Sign in   Forgot Password?

Create Account

New user? Create an account below to begin using the ISO Trading Partner Registration system.

Get Started

After sign-on, Trading Partners will have the option to either create a new TPP or update a previously submitted TPP. Any previously submitted TPP will be visible on the below screen:
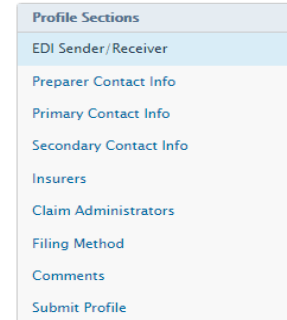
The TPP Registration System consists of the following sections shown at right. These profile sections will be explained in the How to Complete a New RIDLT EDI TPP section below:

How to Complete a New RIDLT EDI TPP:

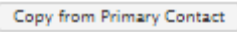Click on the 'Create New Profile' button to create a new profile.

Required fields are indicated in bold formatting throughout these instructions. Any required fields that have not been completed upon clicking the 'Continue' or 'Next Page' buttons will be highlighted with a red box around the affected field.

When filling out the TPP, references to "DN" (e.g. Insurer Name (DN0007)) indicate that the information being requested is an EDI Data Element (DN) found in Claims EDI Reports. Information supplied in DN-associated TPP fields will be used as validations against data reported in the corresponding Claims EDI data elements.

a. EDI Sender: This section provides identifying information about the Master Trading Partner (Sender).
   a. **Sender Master FEIN**: Enter the Federal Employer Identification Number (FEIN) of your business entity. Please enter exactly 9 digits with no punctuation.
   b. **Sender Postal Code:** Enter the Postal Code (Zip+4) of your business entity. Please enter exactly 9 digits with no punctuation. Click 'Continue' after populating the Sender Master FEIN and Sender Postal Code fields.
   c. **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 RIDLT. PLEASE DO NOT USE ACRONYMS.
   d. **Group FEIN:** This field will be automatically populated with the Sender Master FEIN entered in the previous screen. The Group FEIN allows an EDI Sender that purchased another company to update the Claim Admin FEIN, et al on any claim in the same group even though they will have a different Sender ID (FEIN / Postal Code).

      Note: The Sender Master FEIN and Sender Postal Code TPP fields should match the Sender ID (DN0098) in the Header Record of all Claims EDI transmissions.

Click 'Next Page' once the Company Name is populated.

b. <u>Preparer Contact Information:</u> This section provides identifying information about the person completing the EDI TPP.
    a. **Preparer Name:** Enter the contact name of the person completing the EDI TPP.
    b. **Preparer Job Title**: Enter the preparer's job title.
    c. **Preparer Address, City, State,** and **Zip:** Enter the preparer's address. Note: Zip Code – Please enter at least 5 digits with no punctuation.
    d. **Preparer Phone** and Fax: Enter the preparer's phone and fax number. Note: Please enter 10 digits with no punctuation.
    e. **Preparer Email:** Enter the preparer's email address.

c. <u>Primary/Secondary Contact Information:</u> This section identifies individuals within your business entity who can be used as the main contacts for this TPP. These individuals will be contacted regarding any support / compliance issues with the TPP itself or Claims EDI reporting. The first contact entered will be the Primary Contact. If the Secondary Contact is the same person as the Primary Contact, click the 'Copy from Primary Contact' button On the form, complete the following information for each specific contact.

Primary Contact:

    a. Contact Name: **First**, Middle, **Last,** Suffix
    b. Job Title: **Contact's Job Title**
    c. **Address Line 1,** Address Line 2, **City, State, Zip**
    d. **Phone,** Fax, **Email**

    Note: Zip Code – Please enter at least 5 digits with no punctuation.
    Note: Phone and Fax - Please enter 10 digits with no punctuation.

Secondary Contact:

    e. Contact Name: **First**, Middle, **Last,** Suffix
    f. Job Title: Enter **Contact's Job Title**
    g. **Address Line 1,** Address Line 2, **City, State, Zip**
   h. **Phone,** Fax**, Email**

    Note: Zip Code – Please enter at least 5 digits with no punctuation.
    Note: Phone and Fax - Please enter 10 digits with no punctuation.
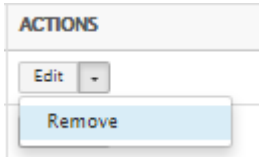
d. <u>Insurer(s):</u>

This section of the form identifies subsidiary entities that are using this EDI Sender to electronically transmit data to RIDLT. At least one Insurer is required for a new TPP. If the EDI Sender is also an Insurer, create a subsidiary Insurer record using the EDI Sender's information. If an EDI Sender represents more than one Insurer, complete the subsidiary Insurer section for each entity. RIDLT will notify the EDI Sender of any discrepancies between the identifying information entered in the TPP and

RIDLT's present records. This list will be used to reconcile Trading Partner relationships, and it will be used as part of the edit on Insurer FEIN (DN0007) to match with RIDLT's database. Complete an UPDATED RIDLT EDI TPP to add or remove subsidiary Insurer entities.
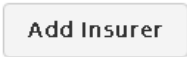
 This button creates a new subsidiary Insurer record on the current EDI TPP submission.

 This button removes the last subsidiary Insurer record entered on the current EDI TPP submission.

a. To create a subsidiary Insurer record:

- Click the 'Add Insurer' button.
- Enter the applicable Insurer information. Required fields are highlighted in red below – Insurer FEIN (DN0006), Insurer Name (DN0007), and Insurer Type (Insurer, Self-Insurer, or Guaranteed Fund):

b. To create additional subsidiary Insurer records:

- 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 ("Insurer #2" in this case). Complete the required information and repeat the process to add the subsidiary Insurer information. Once completed, continue to the Add Claim Administrator(s) section.

Insurer(s)

FEIN	INSURER NAME	STATUS	ACTIONS
123456789	Insurer #1		Edit ▾
753159789	Insurer #2		Edit ▾

c. To remove the last subsidiary Insurer entered on the current EDI TPP submission:

- in the Action column of the relevant subsidiary Insurer row, click the downward arrow icon to the right of the 'Edit' button and click 'Remove' in the expanded list.


- Once clicked, confirm deletion of the most recent entry by clicking on 'Delete Insurer'

 Once clicked, the entry that has not been submitted previously (i.e. was just added when editing) is deleted.

e. Claim Administrator(s):

This section of the form identifies Claim Administrators that are reported by the EDI Sender in Claims EDI transactions. At least one Claims Administrator is required for a new TPP. If the EDI Sender is also a Claims Administrator, create a Claims Administrator record using the EDI Sender's information. If an EDI Sender reports for more than one Claim Administrator, complete the Claim Administrator section for each entity. RIDLT will notify the EDI Sender of any discrepancies between the identifying information entered in the TPP and RIDLT's present records. This list will be used to reconcile Trading Partner relationships, and it will be used as part of the edits on the corresponding data elements to match with RIDLT's database. Complete an UPDATED RIDLT EDI TPP to add or remove Claim Administrators.
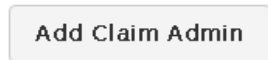
 This button creates a new Claim Administrator on the current EDI TPP submission.
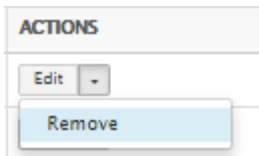
 This button removes the last Claim Administrator entered on the current EDI TPP submission.

a. To 'Add a Claim Administrator':

- Click the 'Add Claim Admin' button.
- Enter the applicable Claim Administrator information. Required fields are highlighted in red below:
  o **Claim Administrator FEIN (DN0187)**
  o **Claim Administrator Name (DN0188)**
  o Claim Administrator Information/Attention Line (DN0135)
  o Claim Administrator Claim Contact Name

- **Claim Administrator Claim Contact Phone Number**
- Claim Administrator Claim Contact Email
- **Claim Administrator Mailing Address (DN0010)**
- Claim Administrator Mailing Secondary Address
- **Claim Administrator Mailing City (DN0012)**
- **Claim Administrator Mailing State Code(DN0013)**
- **Claim Administrator Mailing Postal Code (DN0014)**
- **Claim Administrator Physical Address**
- Claim Administrator Physical Secondary Address
- **Claim Administrator Physical City**
- **Claim Administrator Physical State Code**
- **Claim Administrator Physical Postal Code (DN0200)**

b. <u>To create additional Claim Administrator records:</u>

- Click the 'Add Claim Admin' button, otherwise proceed to the Filing Method section.
- By clicking 'Add Claim Admin', another Claim Administrator entry will be presented (Claim Admin #2 in this case). Complete the required information and repeat the process to add the Claim Administrator information. Once completed, continue to the Filing Method section.

c. <u>To remove the last Claim Administrator entered on the current EDI TPP submission:</u>

- In the Action column of the relevant Claim Administrator row, click the downward arrow icon to the right of the 'Edit' button and click 'Remove' in the expanded list.

- Once clicked, confirm deletion of the most recent entry by clicking on 'Delete Claim Administrator' Once clicked, the entry that has not been submitted previously, (i.e. was just added when editing) is deleted.

f. <u>Filing Method:</u> Selection of a filing method is required.

   a. **EDI Vendor:** Complete this section if EDI Sender is using an EDI Vendor to submit Claims EDI reporting to Jurisdiction's Vendor. First click the radio button beside EDI Vendor, then enter the Vendor's Company Name.
   b. **Jurisdiction Web Entry:** Select this option if EDI Sender will be submitting reports manually using the Web Entry System provided by Jurisdiction's Vendor.
   c. **Direct SFTP:** Select this option if EDI Sender will be exchanging EDI files directly with RIDLT's Vendor using SFTP.
      - Enter the following information:
         (1) **Contact Name:** Enter the Vendor's Contact Name.
         (2) **Phone**: Enter the Vendor's Phone Number.
         (3) **Email**: Enter the Vendor's Email Address.

g. Comments: Please include any comments in this section. Click 'Next Page' to continue on to the Submit Profile section.

Comments

[text area]

Save Changes   Next Page

h. Submit the RIDLT EDI Trading Partner Profile:

Click the 'Submit Profile' button in the Submit Profile section to complete the registration process. An email confirmation will be generated per the example in the RIDLT Trading Partner Profile Registration Email Example section of this document. RIDLT will respond via email with confirmation and approval of the RIDLT EDI Trading Partner relationship.

Submit Profile

How to Update an Existing RIDLT EDI TPP:

Update a previously submitted TPP by selecting 'Update' in the ACTIONS column of the relevant TPP:

| Trading Partner Profiles |
| My Profiles |
| New Profile |

Trading Partner Profiles

JUR	TYPE	COMPANY FEIN	COMPANY NAME	STATUS	ACTIONS
ST	Claims	123456789	Trading Partner (Sender)	Submitted	Update ✗

a. Update Insurers or Claim Administrators:

There are three options for updating Insurers (Insurer Section) and/or Claim Administrators (Claim Administrators Section) within the EDI TPP Update:

•   Click the 'Add Insurer' button [Add Insurer] to add a new Insurer.

•   Click the 'Add Claim Admin' button [Add Claim Admin] to add a Claim Administrator to your EDI TPP (one that has never been added, or was previously added and removed).

- Click the 'Remove' menu item (drop-down from the 'Edit' button) and click the 'Mark Inactive' button to inactivate a previously approved Insurer or Claim Administrator on your RIDLT EDI TPP.
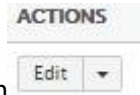
- Click the 'Edit' button to update the Insurer or Claim Admin records previously submitted to RIDLT.

- Once all updates necessary are completed, submit the profile by selecting the 'Submit Profile' button in the Submit Profile section.

b. Update Additional Sections of the TPP:

To update any other section of a previously submitted TPP (e.g. EDI Sender, Preparer Contact Info, Primary Contact Info, Secondary Contact Info, and/or Filing Method sections), select the corresponding section and update the relevant fields. Provide a comment in the Comments section for any additional changes that have been made.

Once all updates necessary are completed, click the 'Submit Profile' button in the Submit Profile section to complete the submission.

c. Change Sender ID:

Click the 'Change Sender ID' menu item(drop-down from 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.

This will create a new TPP – any changes to the Sender ID are considered a new or different Sender.

Note: If all updates made to the existing TPP need to be canceled, click the 'Cancel Updates' button in the Submit Profile section.

RIDLT TPP Registration Email Example

Upon **completion** of an EDI TPP, an auto-response email will be sent to both the Primary Contact and RIDLT. This will serve as notification to all relevant parties that there is an EDI TPP request pending implementation. Below is an example of the RIDLT EDI TPP registration email. The information that is captured in the EDI TPP submission will be included in the email.

-----Original Message-----
From: www-data@wccapture.com [mailto:www-data@wccapture.com]
Sent: Wednesday, July 1, 2020 12:00 PM
To: DLT.WCEDI@dlt.ri.gov; zachary.pfeiffer@dlt.ri.gov
Cc : RIDLTEDI@iso.com ; *Preparer's Email; Primary Contact's Email here; Secondary Contact's Email here; Filing Method Contact's Email Here*
Subject: EDI New Profile RI - *Your Company's Name here*

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

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

-- EDI Sender/Receiver (Primary Insurer/TPA) –
Company Name: Sender Trading Partner Name
Master FEIN: 123456789
Postal Code: 123451234
Group FEIN: 987654321

-- Preparer Contact Information --
Preparer Name: John Smith
Preparer Title: Associate Claims Handler
Preparer Addr 1: 56 Breezy Drive
Preparer Addr 2:
Preparer City: Quahog
Preparer State: RI
Preparer Zip: 12345
Preparer Phone: 401-123-7890
Preparer Fax: 401-123-7891
Preparer Email: preparercontact@edisender.example.com

-- Filing Information --
Filing Method: EDI Vendor
Vendor Company: EDI Vendor Name
Vendor Phone: 401-123-7892
Vendor Email: example@vendor.example.com

-- Primary Contact for EDI Implementation/Setup --
Primary Contact Name: Jane Smith

Primary Contact Title: EDI Claims Manager
Primary Contact Addr 1: 56 Breezy Drive
Primary Contact Addr 2:
Primary Contact City: Quahog
Primary Contact State: RI
Primary Contact Zip: 44444
Primary Contact Phone: 401-123-7893
Primary Contact Fax: 401-123-7894
Primary Contact Email: primarycontact@edisender.example.com

-- Secondary Contact --
Secondary Contact Name: Joan Smith
Secondary Contact Title: Business Systems Analyst
Secondary Contact Addr 1: 56 Breezy Drive
Secondary Contact City: Quahog
Secondary Contact State: RI
Secondary Contact Zip: 44444
Secondary Contact Phone: 401-123-7895
Secondary Contact Fax: 401-123-7896
Secondary Contact Email: secondarycontact@edisender.example.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):   564738219
Insurer Name (DN0007):   Example Insurer 2
Insurer Type: Insurer

-- Claim Administrators --

-- Claim Administrator (1) --
Action: Add
Claim Administrator Status: Active
Claim Admin FEIN (DN0187):   192837465
Claim Admin Name (DN0188):   Legal Name of Claim Administrator Entity
Claim Admin Attention Line:
Representative Name (DN0140):   Jim Smith (Claim Admin Representative)
Representative Business Phone: 401-123-7897
Mailing Primary Addr: P.O. BOX 444

Mailing Secondary Addr:
Mailing City: Quahog
Mailing State Code: RI
Mailing Postal Code: 444441444
Physical Primary Address: 45 Pineapple Boulevard
Physical Secondary Address:
Physical City: Quahog
Physical State Code: RI
Physical Postal Code: 444445678