



Virginia Integrated Services Solution

EDI Portal User Guide

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Table of Contents

1	Form Submissions	5
1.1	EDI Enrollment Form	5
2	EDI Portal – User Role	7
2.1	Login to EDI portal application	7
2.2	Sign Trading Partner Agreement for new user	9
2.3	Update service center address details	11
2.4	Update service center authorized transactions	13
2.5	Update user details	16
2.6	Update password	18
3	Appendix: Acronyms List	19

Table of Tables

Table 1: Acronyms List	20
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Table of Figures

Figure 1: EDI enrollment form	5
Figure 2: Submitter Information	5
Figure 3: Transaction Authorizations	6
Figure 4: Submission of EDI enrollment request	6
Figure 9: EDI portal Login Page	7
Figure 10: License Agreement	7
Figure 11: Verify Identity	8
Figure 12: OTP Login	8
Figure 13: Landing Page	9
Figure 14: Service Center User Home Page	9
Figure 15: Trading Partner Agreement	10
Figure 16: DocuSign Agreement	10
Figure 17: Trading Partner Profile Page	11
Figure 18: Primary User Home Page	11
Figure 19: Trading Partner Profile	12
Figure 20: Edit Service Center Address	12
Figure 21: Address Update	13
Figure 22: Primary User Home Page	13
Figure 23: Trading Partner Profile	14
Figure 24: Edit Service Center Address	14
Figure 25: DocuSign Agreement	15
Figure 26: Trading Partner Profile Page	15
Figure 27: Primary User Home Page	16
Figure 28: Trading Partner Profile	16
Figure 29: User Profile	17
Figure 30: Edit User Details	17
Figure 31: User Details Update Confirmation	17
Figure 32: Primary User Home Page	18
Figure 33: Change Password	18
Figure 34: Change Password Confirmation	18

Overview

This document contains step by step instructions for navigating through EDI portal and other form submissions associated with EDI. This document also covers scenarios and action that can be performed by the EDI admin. Below listed are few high-level scenarios that are covered in this manual.

- EDI Enrolment Foam Submission (Public Portal)
- EDI Portal – User Role Functionalities

1 Form Submissions

This section provides actions that can be performed using enrollment and authorization form.

1.1 EDI Enrollment Form

1. Open EDI Enrollment form.

The screenshot shows the MCS Virginia.gov website. The top navigation bar includes 'For Providers', 'For Members', 'CONTACT', 'SEARCH', and 'LOGIN'. The main content area features a 'HOME' link and a large blue box with the text 'EDI Enrollment Form'. Below this is the section title 'Section 1. Submitter Information'. The form fields are: Name (empty), Address (100 main st), Address 2 (empty), City (empty), State (dropdown menu), and a State dropdown menu.

2. Fill all the required details for service center and primary user.

The screenshot shows the MCS Virginia.gov website with the 'EDI Enrollment Form' page. The section 'Section 1. Submitter Information' is filled out with the following details: Trading Partner Name: Blue Shield; Address Line 1: 10103 Sandywood Dr; Address Line 2: Optional; City: Miami; State: Florida; Zip Code: 39987; Primary User First Name: Jack; Primary User Last Name: Bauer; Job Title: Analyst; Primary Phone Number: (999) 999-9999; Ext. No.: 454545; Primary Cell Number: Optional; Primary E-mail Address: edportaltest@gmail.com.

3. Select the transaction types and click on Submit button.


Section 2. Transactions Available for Transmission

Inbound Batch	Outbound Batch
<input type="checkbox"/> 837-P (Professional Claims)	<input checked="" type="checkbox"/> 835(Remittance Advice)/277U (Pended Claim)
<input type="checkbox"/> 837-I (Institutional Claims)	
<input type="checkbox"/> 270/271 (Eligibility Req/Resp)	
<input checked="" type="checkbox"/> 276/277 (Claims Status Req/Resp)	

[Submit](#)

4. EDI Enrollment request should be submitted to DMAS and user should receive a success message.

An Agency of the Commonwealth of Virginia

EPS MES Training

Thank you for submitting your EDI Enrollment details. Service center has created with service center id: 4005. Please check your email for more details.

[Back to form](#)

[Glossary of Terms and Acronyms](#) [Privacy Policy](#) For Help with this Webpage:
dmasedisupport@dmas.virginia.gov
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Department of Medical Assistance Services

[Translation Services](#) [Nondiscrimination/Accessibility](#)

2 EDI Portal – User Role

This section provides actions that can be performed by a user in EDI portal.

2.1 Login to EDI portal application

1. Login to EDI portal with valid user credentials.



2. Accept license agreement and click on submit button

Commonwealth of Virginia -- Department of Medical Assistance Services (DMAS)

***** WARNING *****

Medicaid Enterprise System (MES)

You are accessing a U.S. Government information system, which includes:

1. This computer
2. This computer network
3. All computers connected to this network, and
4. All devices and storage media attached to this network or to a computer on this network.

This information system is provided for U.S. Government authorized use only. Unauthorized access, misuse, or modification of this computer system or of the data contained herein or in transit to/from this system constitutes a violation of Section 1902(a)(7) of the Social Security Act Title 18, and/or the Health Insurance Portability and Accountability Act (HIPAA)(1996)(2013 modified) that may subject the individual to Criminal and Civil penalties.

By using this information system, you understand and consent to the following:

1. You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system.
2. At any time and for any lawful government purpose, the Government may monitor, intercept, search and seize any communication or data transiting or stored on this information system.
3. Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose.

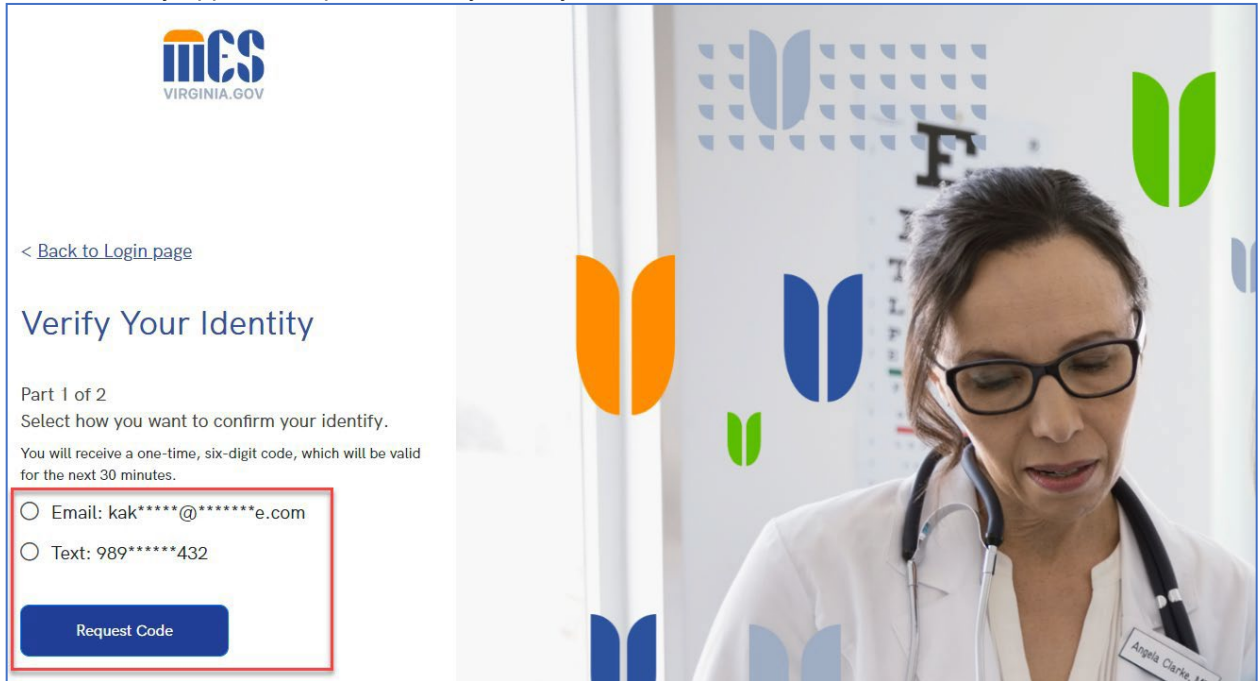
Use of the MES is contingent upon the Acceptance of the above terms.

I accept the terms of the license agreement

I do not accept the terms of the license agreement

Submit

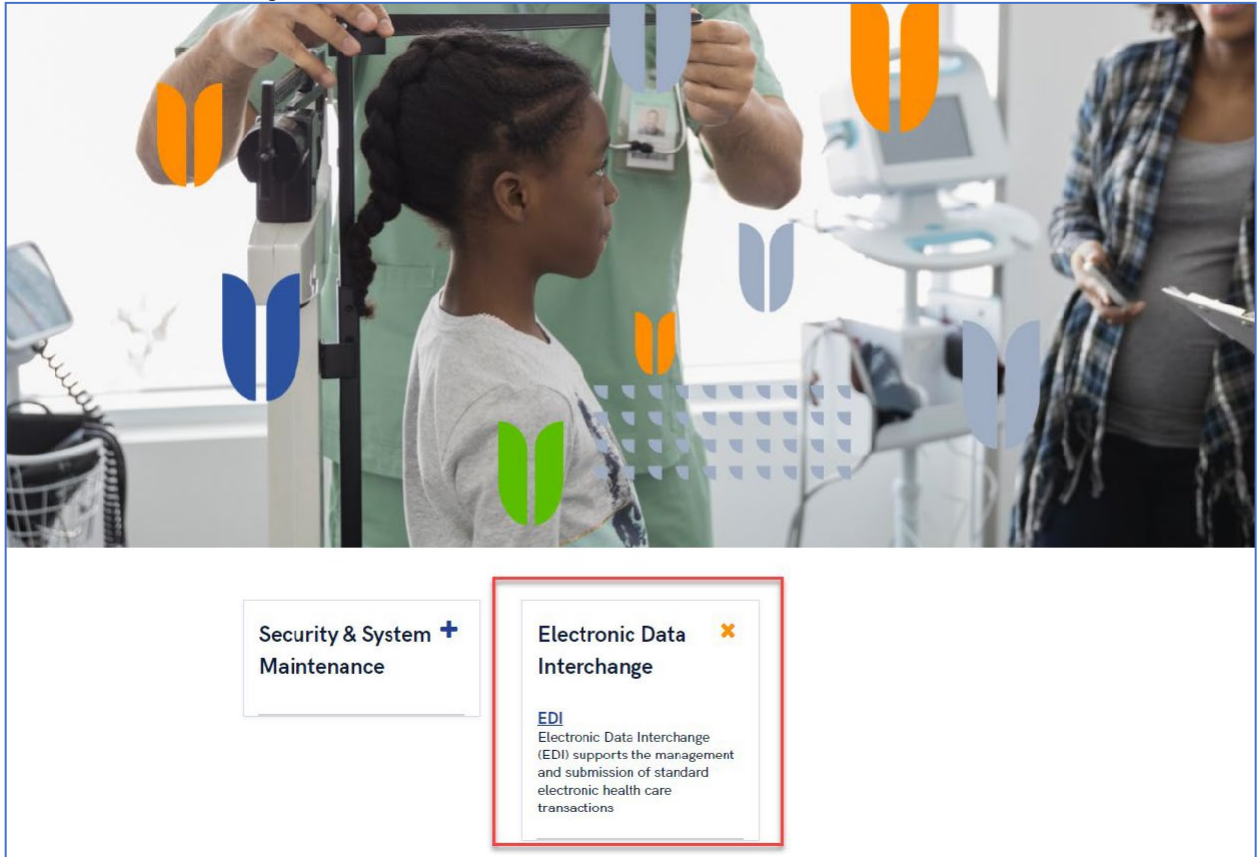
3. Select any applicable option to verify identity and receive OTP.



4. Confirm login by entering OTP.



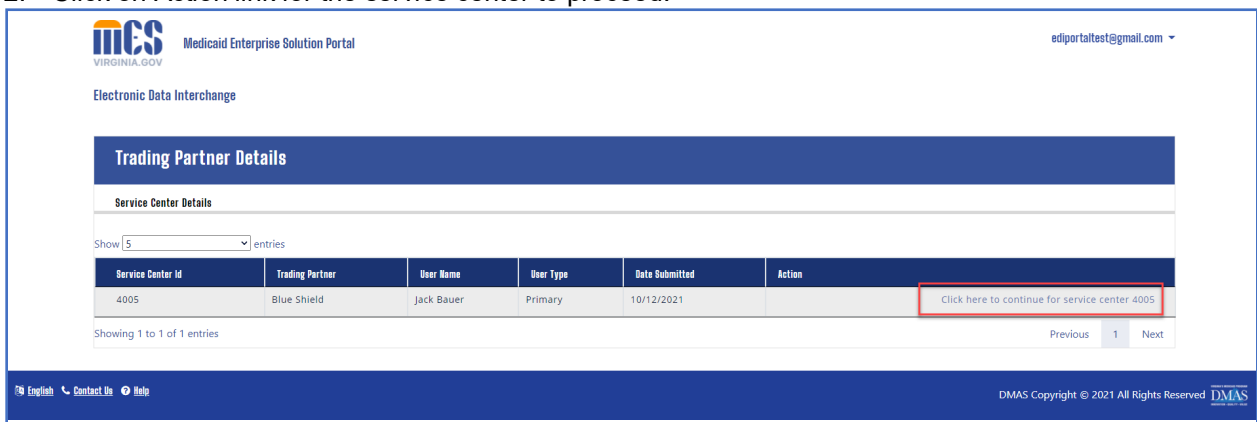
5. After successful login, click on EDI link.



6. EDI Web portal application page should be displayed as per user role.

2.2 Sign Trading Partner Agreement for new user

1. Login to EDI portal with valid user credentials following steps in 3.1.
2. Click on Action link for the service center to proceed.



- Agreement signing page should be displayed if user has not previously signed an agreement for this service center. User should be able to click on 'Sign Agreement Here' link.

mcs Medicaid Enterprise Solution Portal Jack Bauer ▾

Electronic Data Interchange

This is to certify that on the **12th of October, 2021, Blue Shield**, located at **10103 Sandywood Dr Miami, Florida . 39987**, For the X12 EDI transaction types: **276/277, 277U, 835** agrees to the following conditions for submission of electronic transactions to the Department of Medical Assistance Services:

1. The Service Center agrees to abide by the policies and procedures of the Department of Medicaid Assistance Services.
2. The Service Center is not to be construed as an agent of the Department of Medicaid Assistance Services.
3. The Service Center is recognized as an electronic transaction preparation service, and any agreement of participation between providers and the Department of Medical Assistance Services is not affected.
4. The Service Center will promptly notify the Department of Medical Assistance Services of any changes in the information submitted in this Service Center EDI Trading Partner Agreement.

By checking this box and pressing "submit", you are digitally signing this agreement and agreeing to the terms and conditions stated above.

[Sign Agreement Here](#)

- User should be navigated to DocuSign page to sign the agreement. Sign the agreement by providing Title.

Done! Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: 12065734-A819-4BED-9387-5F1EEB336BDC

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www.docusign.com


Trading Partner Agreement for Service Center ID 4005

This is to certify that on the 12th of October, 2021, Blue Shield, located at 10103 Sandywood Dr, Miami, Florida, 39987, for the X12 EDI transaction types:

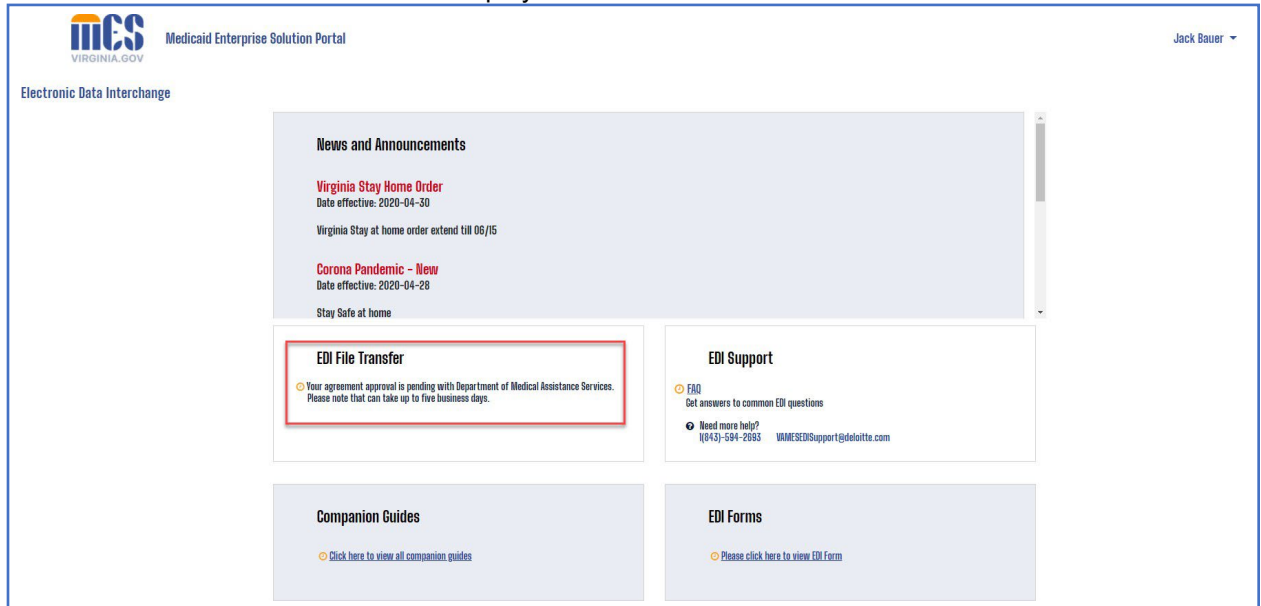
BATCH	
<input type="checkbox"/>	837P
<input type="checkbox"/>	837I
<input type="checkbox"/>	270/271
<input checked="" type="checkbox"/>	276/277
<input checked="" type="checkbox"/>	835/277U

agrees to the following conditions for submission of electronic transactions to the Department of Medical Assistance Services:

1. The Service Center agrees to abide by the policies and procedures of the Department of Medicaid Assistance Services.
2. The Service Center is not to be construed as an agent of the Department of Medicaid Assistance Services.
3. The Service Center is recognized as an electronic transaction preparation service, and any agreement of participation between providers and the Department of Medical Assistance Services is not affected.
4. The Service Center will promptly notify the Department of Medical Assistance Services of any changes in the information submitted in this Service Center EDI Trading Partner pocket.
5. The agreement may be terminated on thirty day's written notice by either party.
6. The agreement will become effective when executed by both parties and may be amended only in writing, similarly executed.

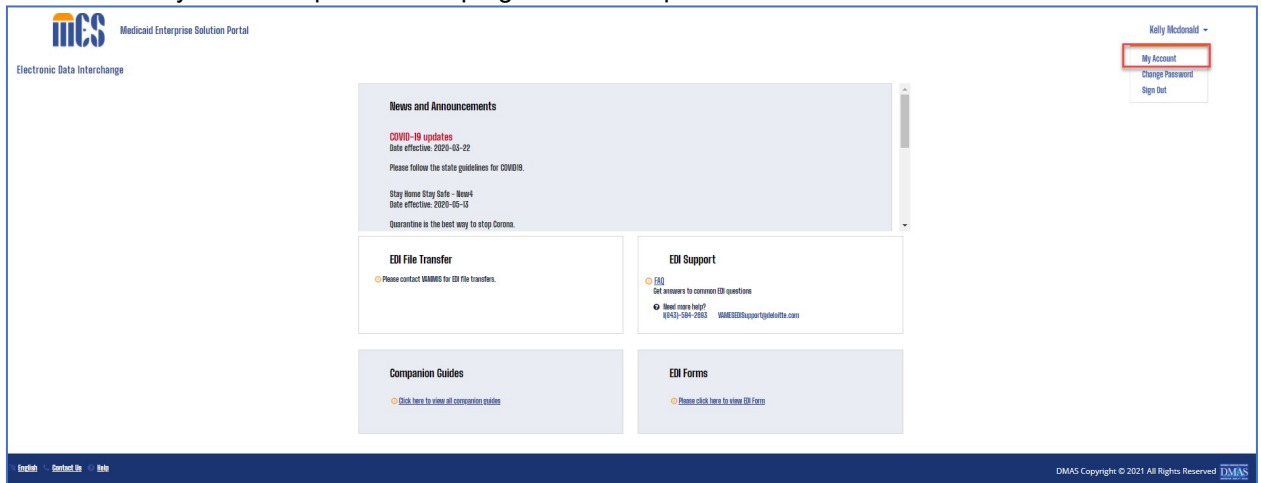
Trading Partner Details	Agreement Approver Details
First Name Jack	First Name Approver
Last Name Bauer	Last Name Signhere
Title <input type="text" value="Primary User"/>	Title
Trading Partner Signature 	Approver Signature

- User should be navigated back to EDI portal home page and message should be displayed stating agreement is pending with DMAS along with other important EDI links. Also, news and announcement section should be displayed.



2.3 Update service center address details

- Login to EDI portal with valid user credentials following steps in 3.1.
- Click on My Account option from top right corner dropdown menu



- Account details should be displayed. Click on Edit button

mcs Medicaid Enterprise Solution Portal

Electronic Data Interchange

Home > Trading Partner Profile

Test Complete


Edit

Service Center

Service Center ID
4023

Address
100 main st
Sanford, Florida, 32771

Primary User



Kelly McDonald

Phone Number Ext. No.
(343) 543-5435 ---

Mobile Number
Not Applicable

E-mail Address
edi.portal.test@gmail.com

Authorized Batch Transactions

-  270/271
-  276/277

Completed Forms	Last Updated
EDI Enrollment	12/16/21
Trading Partner Agreement	12/16/21

4. Edit Service Center Address details and click on Save button.

Home > Trading Partner Profile

Test Complete

Service Center

Service Center ID
4023


Address

901 International Pkwy

Lake Mary

Florida 32746

Primary User








Kelly McDonald

Phone Number Ext. No.
(343) 543-5435 ---

Mobile Number
Not Applicable

E-mail Address
edi.portal.test@gmail.com

Authorized Batch Transactions

-  270/271
-  276/277
-  837P
-  837I
-  835/277U

Completed Forms	Last Updated
EDI Enrollment	12/16/21
Trading Partner Agreement	12/16/21

5. Address details should be updated successfully, and message will be displayed.

The screenshot shows the Medicaid Enterprise Solution Portal (MES) interface. At the top, the logo and "Medicaid Enterprise Solution Portal" are visible. Below the logo, "Electronic Data Interchange" is displayed. A red-bordered box highlights a message: "Service center address details updated successfully!". The breadcrumb trail shows "Home > Trading Partner Profile". Under "Test Complete", there is a "Service Center" section with the following details:

- Service Center ID: 4023
- Address: 901 International Pkwy
- Lake Mary
- Florida
- 32746

On the right side, there are two summary boxes:

- Authorized Batch Transactions:** 270/271, 276/277
- Completed Forms:** EDI Enrollment (12/16/21), Trading Partner Agreement (12/16/21)

2.4 Update service center authorized transactions

1. Login to EDI portal with valid user credentials following steps in 3.1.
2. Click on My Account option from top right corner dropdown menu

The screenshot shows the Medicaid Enterprise Solution Portal (MES) interface. At the top, the logo and "Medicaid Enterprise Solution Portal" are visible. Below the logo, "Electronic Data Interchange" is displayed. In the top right corner, the user name "Kelly McDonald" is shown with a dropdown menu. The dropdown menu is open, and the "My Account" option is highlighted with a red-bordered box. Other options in the menu are "Change Password" and "Sign Out". The main content area includes:

- News and Announcements:** COVID-19 updates (Date effective: 2020-03-22), Stay Home Stay Safe - New! (Date effective: 2020-05-18), Quarantine is the best way to stop Corona.
- EDI File Transfer:** Please contact WMBMS for EDI file transfers.
- EDI Support:** Get answers to common EDI questions, Need more help? (844) 546-2563, WMBMSupport@mdwvta.com
- Companion Guides:** Click here to view all companion guides
- EDI Forms:** Please click here to view EDI Form

At the bottom, there are links for "English", "Contact Us", and "Help". The footer contains "DMAS Copyright © 2021 All Rights Reserved" and the DMAS logo.

3. Account details should be displayed. Click on Edit button

mcs Medicaid Enterprise Solution Portal

Electronic Data Interchange

Home > Trading Partner Profile

Test Complete

Edit

Service Center

Service Center ID
4023

Address
901 International Pkwy
Lake Mary ,Florida ,32746

Primary User

KM Kelly McDonald
Phone Number Ext. No.
(343) 543-5435 ---
Mobile Number
Not Applicable
E-mail Address
edi.portal.test@gmail.com

Authorized Batch Transactions

- 270/271
- 276/277

Completed Forms Last Updated

EDI Enrollment	12/16/21
Trading Partner Agreement	12/16/21

4. Check/Uncheck checkboxes in Authorized Transactions sections and click on Save button.

mcs Medicaid Enterprise Solution Portal

Electronic Data Interchange

Home > Trading Partner Profile

Test Complete

Service Center

Service Center ID
4023

Address
901 International Pkwy
Lake Mary
Florida 32746

Primary User

KM Kelly McDonald
Phone Number Ext. No.
(343) 543-5435 ---
Mobile Number
Not Applicable
E-mail Address
edi.portal.test@gmail.com

Authorized Batch Transactions

- 270/271
- 276/277
- 837P
- 837I
- 835/277U

Completed Forms Last Updated

EDI Enrollment	12/16/21
Trading Partner Agreement	12/16/21

- Clicking on Save button, user should be navigated to DocuSign page to sign the agreement. Sign the agreement by providing Title.

DocuSign Envelope ID: 1BE78180-CB17-4FE7-8381-E3EF627D6718

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www.docuSign.com

Trading Partner Agreement for Service Center ID 4023


This is to certify that on the 20th of January, 2022, Kelly,

for the X12 EDI transaction types:

BATCH	
<input type="checkbox"/>	837P
<input checked="" type="checkbox"/>	837I
<input checked="" type="checkbox"/>	270/271
<input type="checkbox"/>	276/277
<input checked="" type="checkbox"/>	835/277U

agrees to the following conditions for submission of electronic transactions to the Department of Medical Assistance Services:

- The Service Center agrees to abide by the policies and procedures of the Department of Medicaid Assistance Services.
- The Service Center is not to be construed as an agent of the Department of Medicaid Assistance Services.
- The Service Center is recognized as an electronic transaction preparation service, and any agreement of participation between providers and the Department of Medical Assistance Services is not affected.
- The Service Center will promptly notify the Department of Medical Assistance Services of any changes in the information submitted in this Service Center EDI Trading Partner pocket.
- The agreement may be terminated on thirty day's written notice by either party.
- The agreement will become effective when executed by both parties and may be amended only in writing, similarly executed.

<p>Trading Partner Details</p> <p>First Name Kelly</p> <p>Last Name McDonald</p> <p>Title Analyst</p> <p>Trading Partner Signature</p> 	<p>Agreement Approver Details</p> <p>First Name Approver</p> <p>Last Name Signere</p> <p>Title DMAS Administrator</p> <p>Approver Signature</p>
---	--

- User should be navigated back to profile page with the status as pending for all the transactions that were updated.

MCS Medicaid Enterprise Solution Portal

Electronic Data Interchange

File authorization details updated successfully!

Home > Trading Partner Profile

Test Complete

Service Center

Service Center ID: 4023

Address: 901 International Pkwy

Lake Mary

Florida 32746

Primary User

Authorized Batch Transactions

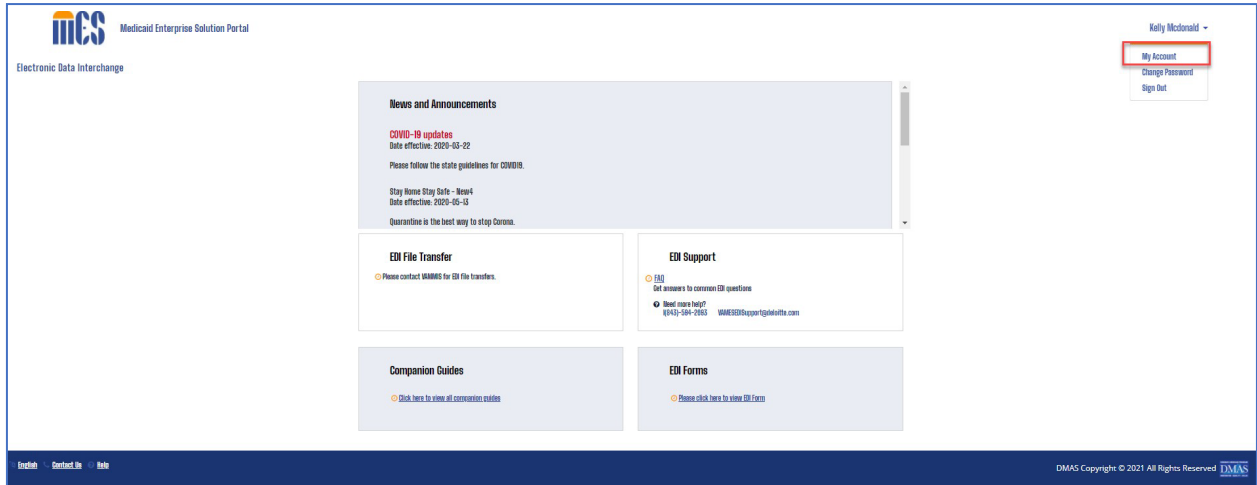
- 837I - Pending
- 835/277U - Pending
- 270/271
- 276/277 - Pending

Completed Forms Last Updated

EDI Enrollment	12/10/21
Trading Partner Agreement	12/10/21

2.5 Update user details

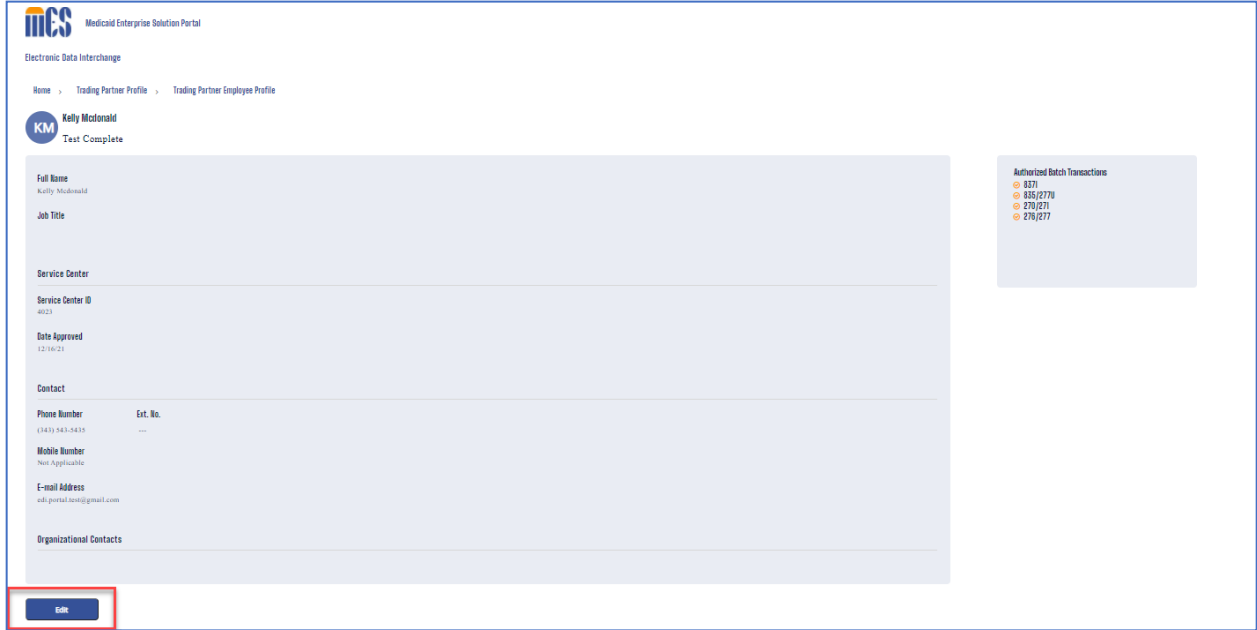
1. Login to EDI portal with valid user credentials following steps in 3.1.
2. Click on My Account option from top right corner dropdown menu



3. Account details should be displayed. Click on user's name or Icon to open user details. Primary user can update his details as well as any secondary user that belongs to the same service center.



4. User details will be displayed. Click on Edit button



5. Title and phone number can be updated for any primary/secondary user. Edit the details and click on Save button.

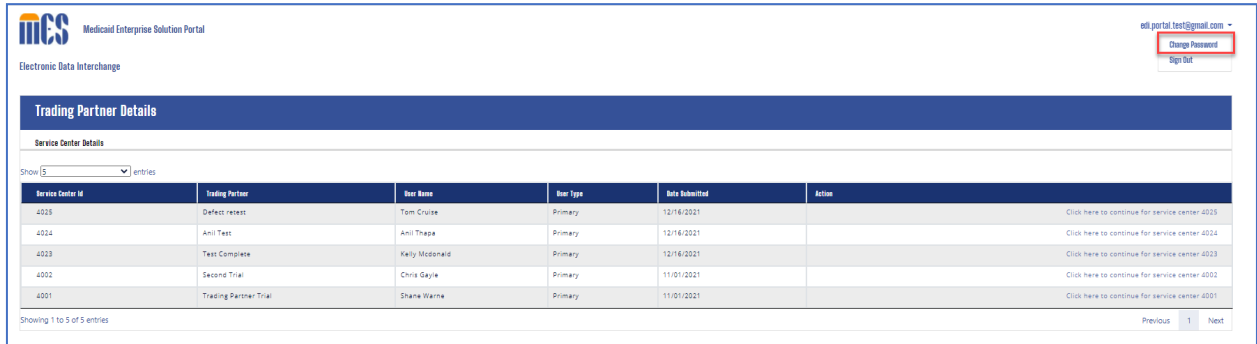


6. User details should be updated successfully, and message should be displayed.

Figure 27: User Details Update Confirmation

2.6 Update password

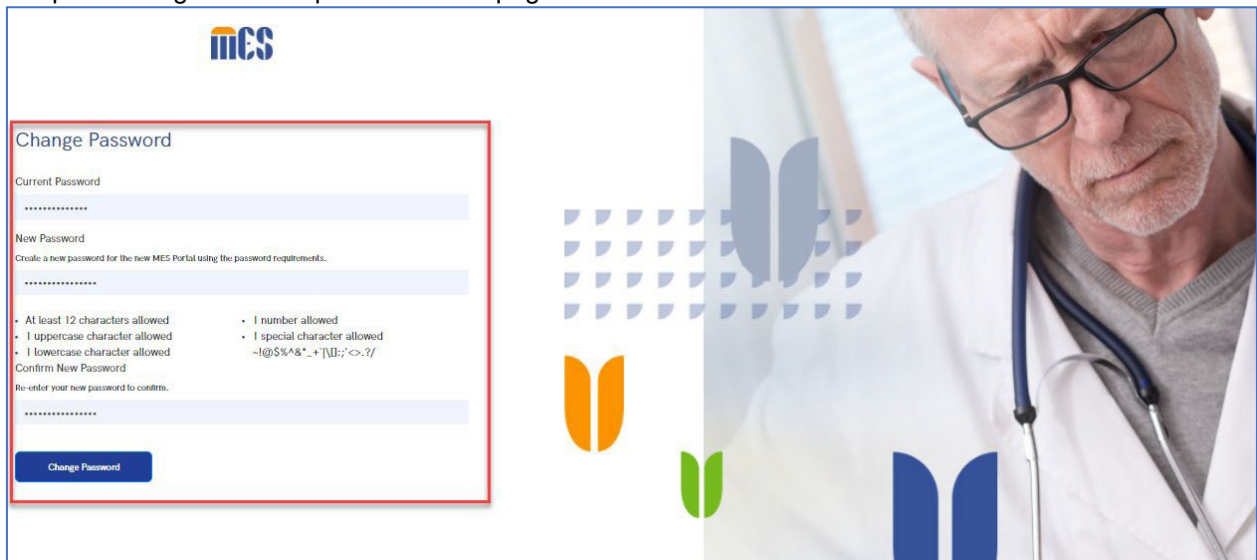
1. Login to EDI portal with valid user credentials following steps in 3.1.
2. Click on change password option from top right corner dropdown menu



The screenshot shows the MES portal interface. At the top left is the MES logo and 'Medicaid Enterprise Solution Portal'. At the top right, there is a user profile dropdown menu with a 'Change Password' button highlighted. Below this is the 'Trading Partner Details' section, which contains a table of service center information.

Service Center ID	Trading Partner	User Name	User Type	Date Submitted	Action
4025	Defect-retest	Tom Cruise	Primary	12/16/2021	Click here to continue for service center 4025
4024	Anil Test	Anil Thapa	Primary	12/16/2021	Click here to continue for service center 4024
4023	Test Complete	Kelly McDonald	Primary	12/16/2021	Click here to continue for service center 4023
4002	Second Trial	Chris Gayle	Primary	11/01/2021	Click here to continue for service center 4002
4001	Trading Partner Trial	Shane Warren	Primary	11/01/2021	Click here to continue for service center 4001

3. Change Password screen will be displayed. Enter current password, New password and confirm password fields. New password and confirm password should match and must as per the password guidelines specified on the page.



The screenshot shows the 'Change Password' form. It includes three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Below the 'New Password' field, there are password requirements:

- At least 12 characters allowed
- 1 uppercase character allowed
- 1 lowercase character allowed
- 1 number allowed
- 1 special character allowed

The special character list is: ~!@#\$%^&*~_+|{};':<>.,?/.

4. Password should be changed successfully, and Home button should be displayed



The screenshot shows a success message in a red-bordered box: 'Your password has been changed successfully.' Below the message is a blue 'Home' button.

3 Appendix: Acronyms List

The following acronyms are used in project documents:

Acronym/Term	Definition
API	Application Programming Interface
CAQH CORE	Council for Affordable Quality Healthcare Committee on Operating Rules
CMS	Center for Medicare & Medicaid Services
COTS	Commercial Off-the-Shelf (products)
DCI	Data Center Interconnects
DMAS	Department of Medical Assistance Services
DSD	Detailed System Design
DTD	Document Type Definition
DMZ	De-Militarized Zone
EDI	Electronic Data Interchange
EPS	Encounter Processing Solution
ESB	Enterprise Service Bus
Ethernet/IP	Ethernet Industrial Protocol
HIPAA	Health Insurance Portability & Accountability Act
HTTP/S	Hypertext Transfer Protocol (Secure)
ICAM	Identity, Credential, and Access Management
IDG	IBM DataPower® Gateway
iPDU	Identity Provider
IIB	IBM® Integration Bus
IPSec	Internet Protocol Security
ISAM	IBM® Security Access Manager
ISIM	IBM® Security Identity Manager
ISS	Integration Services Solution
IT	Information Technology
LDAP	Lightweight Directory Access Protocol
MES	Medicaid Enterprise System
MFT	Managed File Transfer
MIP	Module Integration Planning
MIME	Multipurpose Internet Mail Extensions
MITA	Medicaid Information Technology Architecture
MLM	Medicaid Lifecycle Management
MQ	IBM Message Queueing
NLS	National Language Support
ODS	Operational Data Store
OLAP	Online Analytical Processing
OLTP	Online Transactional Processing
OPSS	Operations Services Solution
PBMS	Pharmacy Benefit Management Solution
PKI	Public Key Infrastructure

Acronym/Term	Definition
POP	Point-of-Presence
PRSS	Provider Services Solution
QM	Queue Manager
RTM	Requirements Traceability Matrix
PUBSUB	Publish Subscribe
SAML	Security Assertion Mark-up Language
SFTP	Secure File Transfer Protocol
SI	Systems Integrator
SLM	Service Level Monitoring
SMTP	Simple Mail Transfer Protocol
SOAP	Simple Object Access Protocol
SP	Service Provider
SNIP	Strategic National Implementation Process
SSL	Secure Sockets Layer
ULM	User Life Cycle Management
VAMES	Virginia Medicaid Enterprise System
VPN	Virtual Private Network
WSDL	Web Service Definition Language
WSRR	WebSphere® Service Registry and Repository
XML	Extensible Markup Language
XSD	XML Schema Definition
XSLT	Extensible Stylesheet Language Transformations

Table 1: Acronyms List