EDI Express Enrollment “E3”

WPS Health Solutions External User Guide for EDI Electronic Transaction Agreements
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Chapter 1: Overview

This guide is to be used for Direct Trading Partners that send and receive files electronically for themselves.

EDI Express Enrollment “E3” is a full self-service automated tool for EDI Paperless Trading Partner enrollment in association with WPS Community Manager. These two programs along with a portal for submission and retrieval of EDI transactions allows the external user to create their own accounts, register for lines of business, and transactions.

E3 allows for:

- Registration and Connectivity agreements for Direct Trading Partners
- Registration for Clearinghouse Agreement when registering as a Clearinghouse
- Registration for Multiple Lines of Businesses
- Registration for Transaction Agreements (EDI, ERA, and EFT)
- Request of Production Approval

**Note:** For best results when completing the enrollment and registration we recommend the following browsers:

- Internet Explorer 8 or newer
- Google Chrome
- Mozilla Firefox 40 or newer
Chapter 2: Direct Trading Partner

Note: Becoming a Direct Trading Partner allows you to send and/or receive files directly to and from WPS through WPS Gateway Express and/or sFTP.

There are three types of Direct Trading Partners.

- **Direct (Healthcare Provider)** – The actual Provider sending/receiving x12 files directly
- **Clearinghouse/Billing Service** – Sends and receives files electronically on behalf of a provider.
  - The selection of Clearinghouse will generate a Clearinghouse Agreement upon completion of this form. This agreement is sent along with the Connectivity Agreement at that time.
- **Vendor** – Your business does not submit transactions electronically but provides practice management software to clients for electronic exchanges.

Note: You will need to complete a Connectivity Agreement for each Trading Partner ID you create.

Becoming a Direct Trading Partner requires you to do the Following

- Register for a WPS Community Manager (WCM)/Gateway Express Account
- Complete a Connectivity Agreement and create Trading Partner ID
- Complete a Transaction Agreement (EDI Claims Submission)
- Set up two (2) Super User Accounts in WPS Community Manager
- Test – Send in a file with minimum of 25 claims
- Request Production Approval

During the E3 enrolment process you will either create your own unique or auto-assign a Trading Partner ID.

- Auto-Assigned Trading Partner IDs shall contain an alpha character “S” followed by 6 numbers
  - Range should be S000001–S999999
  - This is for auto-assignment only
  - Should be used to auto-assign for all Submitter types, excluding Vendors

- Submitter types identified as “Vendor” should be auto-assigned a range using the alpha character of “V” followed by six numbers
  - Range should be V000001–V999999
  - This is for auto-assignment only
  - Range should only be used for Submitter types of “Vendor” when auto-assigning submitter IDs

- The Trading Partner ID that are uniquely created will allow any combination of alpha and numeric values up to 10 characters
Section 2.1 Enrolling to become a Direct Trading Partner as a Provider

Step 1: Click Here to start the Registration process.

Step 2: Check the box indicating “I’m not a robot”.

Step 3: Click the proper images to verify the Captcha and click Verify.
Step 4: Click **Enroll Now** under Providers if you’re a healthcare provider.

**Note:**
If you are a Clearinghouse/Vendor, please see [Section 2.2](#).
If you are a Provider and are going to use one of our Lines of Business’ Portals please see [Section 3.1.3](#).

Step 5: Select the **Electronic Transaction Type**.
Step 5: Click on I Don’t use a clearinghouse/billing agency.

Step 6: Click Register Now.

Note: If you already have a WPS Community Manager account, but have not yet received a Trading Partner ID, you can skip to Step 14 to complete the Registration Process.
Step 7: Click in the green box to start the registration process under Step 1.

Note: Do not close this Tab.

Step 8: Click the Start Registering button.
Step 9: Enter in your **Company Name** and **Email Address** and click **Next**.

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<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>1</strong></td>
<td>Your Company Name – This will be your Partner ID in WPS Community Manager (WCM)</td>
</tr>
<tr>
<td><strong>2</strong></td>
<td>Email Address – This will be your username in WCM and Gateway Express</td>
</tr>
</tbody>
</table>

**Note:** Both fields are Case-Sensitive, how you enter it in these two fields will be how you will enter them into WCM.

**Note:** Special Characters are prohibited (eg. @#%_-/)

**Step 10:** Click on the correct images and click **Verify.**
Step 11: Fill in all the appropriate fields and click **Next**.

**Note:** If the Primary Support Contact is going to be the same as the Primary Legal contact then check the box.
Step 12: Check the box for **EZComm** and **X12**.

**Note:** If you plan to do “Real-Time’ Transactions (270/271 eligibility, 276/277 Claim Status), also select SOAP.

**Note:** There are (4) different Document Types to Exchange
- **EZComm** – Needed for behind the scenes set up
- **Gateway** – DO NOT USE
- **SOAP** – Simple Object Access Protocol, primarily used for “Real-Time” transactions (270/271 eligibility, 276/277 Claim Status)
- **X12** – Electronic Data Interchange (EDI) Standard, WPS standard for receiving/sending 837, 835, 999, and 277CA files.

Step 13: Review the information and submit the registration.
Note: You will see the following when the registration is submitted. An email will be sent to the email address you registered with.

![Image of registration process]

Note: This is a sample of the email you will receive.

From: <communitymanager@wpsic.com>
Date: Fri, Jun 14, 2019, 8:59 AM
Subject: Trading Community Alert from WPS Health Solutions: Registration Update Advisory
To:

Welcome

Greetings!!!

Thank you for submitting your registration to join the trading community of WPS Health Solutions.

Your registration for Self Service has been submitted for review and is now pending for approval. You will receive an email notification regarding the registration status.

Best Regards,

WPS Health Solutions Trading Community (TCM)
1717 W Broadway
Madison, WI 53713
USA

wshhealthsolutions.com

*** This message is sent to you because you have registered to join the trading community of WPS Health Solutions. If you have any questions on our WPS Community Manager Server, please email us at CommunityManager@wpsic.com or call us anytime at 800-782-2080, option #1 ***

CONFIDENTIALITY NOTICE: This e-mail, including any attachments, may contain confidential, privileged and/or proprietary information which is solely for the use of the intended recipient(s). Any review, use, disclosure, or retention by others is strictly prohibited. If you are not an intended recipient, please contact the sender and delete this e-mail, any attachments, and all copies.
Step 14: Go Back to original tab and click **Continue** under Step 2.

Step 15: Enter in the Email address that you used in **Step 1**.

**Note:** This is **Case-Sensitive** and must be entered exactly how it was created.
Step 16: Enter in the Required Information and click **Next**.

Step 17: Click **Sign and Submit** for the WPS Connectivity Agreement
Step 18: Type your name and click Sign Agreement.

Connectivity Agreement Electronic Signature

Please read the displayed agreement carefully as it is legally binding. If you agree to all of the terms in the agreement, type your name in the Signature field below and click the Submit Agreement(s) button.

By typing my name below, I certify that I have reviewed the displayed agreement(s), that the information contained in the Connectivity Agreement Summary is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

Step 19: Create your Trading Partner ID

Note: There are two ways to create a Trading Partner ID

- Self-Assigned ID – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- Auto Assign - The system generates one for you.
Step 20: Click on the **type of benefit or insurance** for which you are enrolling.

Step 21: Click **Continue** on the Mock Agreement.
Step 22: Enter in the Healthcare Provider Information (NPI if applicable) and click Next.

**Note:** If you are enrolling for Medicare Part A or Part B, it will ask you for your group PTAN and NPI. Also, PTAN will need to be capitalized.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Arise, Aspirus Arise, Family Care, and TriWest VA the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Step 23: Enter in the Contact and Business/Mailing information of the Healthcare Provider.
Step 24: Click **SIGN** to sign the agreement.

Step 25: Click **Sign & Submit** on the right.
**Step 26:** Type your Name and click **Sign Agreement**.

![Electronic Signature](image)

**Step 27:** Check Box **I Agree**.

At this point you can do the Following:
1. Click Done >> Sign Selected agreements
2. Add another Provider to the Line of Business and Transaction agreement.
3. Add another Transaction
4. Add another Line of Business.

**Note:** When finished adding new Transactions, Providers, and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click **Done >> Sign Selected Agreements**.

**Note:** You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).
Step 28: Once you click **Sign Selected Agreements**, you will click **Complete & Submit** on the right.

Step 29: Type your Name and click **Sign Agreement**.
Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: Once completed you will receive an email that will direct you to download the “WPS HEALTH SOLUTIONS EDI FRONT END USER GUIDE External User Manual” and a link to reset your password for WCM and Gateway Express.

Note: This is a sample of the email you will receive from WPS when enrolled.

From: <communitymanager@wpsic.com>
Date: Fri, Jun 14, 2019 9:17 AM
Subject: Trading Community Alert from WPS Health Solutions: Registration Update Advisory
To:

Welcome

You have successfully enrolled as a Trading Partner in WPS Community Manager! Just follow the steps below and you'll be ready to go.

1. Initialize your first-time password using the following credentials in WPS Community Manager.
   - Trading Partner Name:
   - User Name:
   - First time password change link:
   - Once you've accessed the above link, you will see the WPS Community Manager sign in screen. Click on “sign in”.
   - Your community manager password must contain at least 9 characters, including one upper case, one lower case, one special character and one number.

2. Please contact the EDI Helpdesk at 1-800-782-2850 Option 1 to request a copy of the WPS Community Manager EDI Front End Manual.

3. Create Users in WPS Community Manager. You will need to have at least two Super Users to make sure your business can be self-sufficient with password resets and staffing changes. WPS EDI Help Desk is not able to reset passwords in WPS Community Manager.
   - A. In WPS Community Manager, select the "More" tab at the top of the page. In the drop down list select "User" and then click "Create User".
   - B. Create super user access. Additional users must use a unique email address.
   - C. Grant write access to standard or super users.
   - D. Grant additional user access to Gateway Express and SFTP.
   - E. In WPS Community Manager, set up your primary inbound transport as VPS-Inbox.

4. Access WPS Gateway Express on our website at https://edi.wpsic.com/gatewayexpress/pw/login.html to send and receive transactions with WPS Health Solutions. Your Gateway Express user Name and password are the same as what you created for WPS Community Manager.

5. Access Display & Reporting User Interface on our website at https://edi.wpsic.com/reporting/ to view your provider relationship approvals. If you would like to update your provider relationships or add types of insurance/benefits or transactions, go to the WPS EDI website and click on the "Enrollments" link.

WPS Health Solutions EDI
Section 2.2 Enrolling to become a Direct Trading Partner as a Clearinghouse/Vendor or Exempt Trading Partner

This section will walk the Clearinghouse/Vendor or Exempt Trading Partner through the process of becoming a Direct Trading Partner.

**Step 1:** Click [Here](#) to start the Registration process.

**Step 2:** Check the box indicating that “I’m not a robot”.

![Image of Begin Enrollment](image)

**Step 3:** Click the proper images to verify the Captcha and click **Verify**.

![Image of Captcha Verification](image)
Step 4: Click **Enroll Now** under Agency & Vendors.

**Note:** If you are a Healthcare Provider and trying to become a Direct Trading Partner see Section 2.1.

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**WPS Health Solutions**

**EDI Express Enrollment**

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**Are you a healthcare provider?**

- **PROVIDERS**
  - Yes I am a healthcare provider
    - Enroll Now

- **AGENCY & VENDORS**
  - No I am not a healthcare provider
    - Enroll Now

---

Step 5: Click **Register Now**.

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**WPS Health Solutions**

**EDI Express Enrollment**

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**WPS Community Manager**

Have you already registered for a WPS Community Manager account?

If you already have a valid WPS Community Manager Account please log in now to continue.

- **WCM Username/Email**
  - [Input field]

- **Password**
  - [Input field]

- **Login**

---

**Register Now**

If you do not have a WPS Community Manager Account.

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**Note:** If you already have a WPS Community Manager account, but have not yet received a Trading Partner ID, you can skip to Step 13 to complete the Registration Process.
Step 6: Click in the green box to start the registration process under Step 1.

Note: Do not close this Tab.

Step 7: Click the Start Registering button.
Step 8: Enter in your Company Name and Email Address and click Next.

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<thead>
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<tbody>
<tr>
<td>1</td>
<td>Your Company Name – This will be your Partner ID in WPS Community Manager (WCM)</td>
</tr>
<tr>
<td>2</td>
<td>Email Address – This will be your username in WCM and Gateway Express</td>
</tr>
</tbody>
</table>

**Note:** Both fields are Case-Sensitive, how you enter it in these two fields will be how you will enter them into WCM.

**Note:** Special Characters are prohibited (eg. @#%_/)

Step 9: Click on the correct images and click Verify.
Step 10: Fill in all the appropriate fields and click Next.

Note: If the Primary Support Contact is going to be the same as the Primary Legal contact then check the box.
Step 1: Check the box for EZComm and X12.

**Note:** If you plan to do “Real-Time’ Transactions (270/271 eligibility, 276/277 Claim Status), also select SOAP.

**Note:** There are (4) different Document Types to Exchange
- **EZComm** – Needed for behind the scenes setup
- **Gateway** – DO NOT USE
- **SOAP** – Simple Object Access Protocol, primarily used for “Real-Time” transactions (270/271 eligibility, 276/277 Claim Status)
- **X12** – Electronic Data Interchange (EDI) Standard, WPS standard for receiving/sending 837, 835, 999, and 277CA files.

Step 12: Review the information and submit the registration.
Note: You will see the following when the registration is submitted. An email will be sent to the email address you registered with.

Note: This a sample of the email you will receive.

From: <communitymanager@wpscom>
Date: Fri, Jun 24, 2019, 8:59 AM
Subject: Trading Community Alert from WPS Health Solutions: Registration Update Advisory
To: 

Welcome

Greetings !!!

Thank you for submitting your registration to join the trading community of WPS Health Solutions.

Your registration for Self Service has been submitted for Review and is now Pending for approval. You will receive an email notification regarding the registration status.

Best Regards,

WPS Health Solutions Trading Community (TCM)
1717 W Broadway
Maddux, W 33713
USA

wpshealthsolutions.com

*** This message is sent to you because you have registered to join the trading community of WPS Health Solutions. If you have any questions on our WPS Community Manager Server, please email us at CommunityManager@wpscom or call us anytime at 800-792-2060, option #1 ***

CONFIDENTIALITY NOTICE: This e-mail, including any attachments, may contain confidential, privileged and/or proprietary information which is solely for the use of the intended recipient(s). Any review, use, disclosure, or retention by others is strictly prohibited. If you are not an intended recipient, please contact the sender and delete this e-mail, any attachments, and all copies.
Step 13: Go Back to original tab and click **Continue** under Step 2.

**Note:** This is Case-Sensitive and must be entered exactly how it was created.
Step 15: Enter in the required Information Trading Partner and Contact Info and click Next.

Step 16: Click Sign and Submit for the WPS Connectivity Agreement
Step 17: Type your name and click **Sign Agreement**.

![Connectivity Agreement Electronic Signature](image)

By typing my name below, I certify that I have reviewed the displayed agreement(s), that the information contained in the Connectivity Agreement Summary is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

**Continue Reading agreement(s)**

Step 18: Create your Trading Partner ID

**Note:** There are two ways to create a Trading Partner ID

- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.

**Note:** Please Contact the EDI Help Desk for the Exempt Provider Code.
Note: Please click the following sections based on type of Direct Trading Partner you are enrolling.

- If you are **Clearinghouse** continue to [Section 2.2.1](#)
- If you are a **Vender** continue to [Section 2.2.2](#)
- If you are **Exempt Trading Partner** continue to [Section 2.2.3](#)

Section 2.2.1 Continuing on as a Clearinghouse.

**Step 19:** Enter in the Clearinghouse/Billing Agency Information and Contact info and click **Next.**

![Clearinghouse/Billing Agency Information](image)

**Step 20:** Click **Sign & Submit** to sign the Clearinghouse Agreement.

![Sign Clearinghouse Agreement](image)
Step 21: Type **Name** and click **Sign Agreement**.

Step 22: Click on the **Type of Insurance or Benefits** for which you are enrolling.
Step 23: Select **Electronic Transaction Type** you are enrolling.

Step 24: Click on **Continue** on the Mock Agreement.
Step 25: Enter in the **Healthcare Provider Information** (NPI if applicable) and click **Next**.

**Note:** If you are enrolling for Medicare Part A or Part B, it will ask you for your group PTAN and NPI. Also, PTAN will need to be capitalized.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Arise, Aspirus Arise, Family Care, and TriWest VA the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Step 26: Enter in the **Healthcare Provider Contact Information** and click **Next**.
Step 27: Click **SIGN** to sign the agreement.

Step 28: Click **Sign & Submit** on the right.
Step 29: Type your **Name** and click **Sign Agreement**.

![Electronic Signature](image)

**Step 30:** Check Box **I Agree**.

At this point you can do the Following:

1. Click Done >> Sign Selected agreements
2. Add another Provider to the Line of Business and Transaction agreement.
3. Add another Transaction
4. Add another Line of Business.

**Note:** When finished adding new Transactions, Providers, and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click **Done >> Sign Selected Agreements**.

**Note:** You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).
Step 30: Click Complete and Submit.

Step 31: Type Name click Submit Agreements.
Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: Once completed you will receive an email that will direct you to download the “WPS HEALTH SOLUTIONS EDI FRONT END USER GUIDE External User Manual” and a link to reset your password for WCM and Gateway Express.

Note: You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.

Note: This is a sample of the email you will receive from WPS when enrolled.

From: <communitymanager@wpsic.com>
Date: Fri, Jun 14, 2013, 9:17 AM
Subject: Trading Community Alert from WPS Health Solutions: Registration Update Advisory
To:

Welcome

You have successfully enrolled as a Trading Partner in WPS Community Manager. Just follow the steps below and you’ll be ready to go.

1. Initialize your first-time password using the following credentials in WPS Community Manager:

   - Trading Partner Name: 
   - User Name: 
   - First time password change link:

   Once you’ve accessed the above link, you will see the WPS Community Manager sign in screen. Click on "sign in".

   Your Community Manager password must contain at least 9 characters, including one upper case, one lower case, one special character and one number.

2. Please contact the EDI Helpdesk at 1-800-782-2080 Option 1 to request a copy of the WPS Community Manager EDI Front End Manual.

3. Create Users in WPS Community Manager. You will need to have at least two Super Users to make sure your business can be self-sufficient with password resets and staffing changes. WPS EDI Help Desk is not able to reset passwords in WPS Community Manager:
   A. In WPS Community Manager, select the "More" tab at the top of the page. In the drop down list select "User" and then click "Create User".
   B. Create super user access. Additional users must use a unique email address.
   C. Grant Write Accesses to standard or super users.
   D. Grant additional user access to Gateway Express and STTR.
   E. In WPS Community Manager, set up your primary inbound transport as VPS-Inbox.

4. Access WPS Gateway Express on our web site at https://edi.wpsic.com/GatewayExpress/Pw/login.html to send and receive transactions with WPS Health Solutions. Your Gateway Express User Name and password are the same as what you created for WPS Community Manager.

5. Access Display & Reporting User Interface on our web site at https://edi.wpsic.com/reporting/ to view your provider relationship approvals. If you would like to update your provider relationships or add types of insurance/benefits or transactions, go to the WPS EDI website and click on the "Enrollments" link.

WPS Health Solutions EDI
Section 2.2.2 Continuing on as a Vendor

Step 19: Select the **Insurance & benefits** you are enrolling.

Step 20: Select the **Electronic Transaction Type** you are enrolling.
Step 21: Check Box I Agree.

At this point you can do the Following:
1. Click Done >> Sign Selected agreements
2. Add another Transaction
3. Add another Line of Business.

Note: When finished adding new Transactions and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

Note: You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).

Step 22: Click Complete and submit.
Step 23: Type Name and click Submit Agreement.

Electronic Signature

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

Signature
Type Name Here

Continue Reading agreement(s)

Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 2.2.3 Continuing on as Exempt

**Step 19:** Enter in the **14-digit number** you get from the EDI Helpdesk agent.

**Other:**

**Exempt Trading Partner**
What is the code provided to you by our help desk? If a code was not provided, please contact our EDI help desk at 800-782-7680.

**Enter your trading partner exempt code:**

[Your provider exempt code must be exactly 13 numbers (numeric values only)]

**Step 20:** Create the **Trading Partner ID**.

**Note:** There are two ways to create a Trading Partner ID

- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.

**WPS HEALTH SOLUTIONS EDI Express Enrollment**

**Exempt Trading Partner - New Trading Partner**

How would you like the new trading partner ID assigned?

- Exempt Trading Partner
  - Please create your trading partner ID
    - **Self Assigned ID**
      - [You may enter any value up to 15 characters]
    - or − **Auto Assign an Exempt Trading Partner ID**
Step 21: Select your **Insurance & Benefits** you are enrolling

Step 22: Select the **Electronic Transaction Type**
Step 23: Check Box I Agree.

At this point you can do the Following:
1. Click Done >> Sign Selected agreements
2. Add another Transaction
3. Add another Line of Business.

**Note:** When finished adding new Transactions; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

**Note:** You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).
Step 24: Click Complete & Submit

Step 25: Type Name and click Submit Agreements
**Note:** Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 2.3 Adding New Lines of Business’ and/or New Transaction for existing Trading Partner

This section will walk Direct Trading Partner through adding new Lines of Business, new EDI Transaction Agreements to their existing Submitter ID and/or adding new Submitter ID.

Step 1: To start EDI Express Enrollment “E3” click **HERE**

Step 2: Check the box **I’m not a robot**.

Step 3: Click on the pictures per the Captcha and click **Verify**.
Step 4: Click **Enroll Now** Button under Providers or Agency & Vendors.

**Note:**
- Healthcare Provider will click Enroll Now under Providers.
- Clearinghouses, Vendors and Exempt Trading Partners will click Enroll Now under Agency and Vendors.

Step 5: Select the **Electronic Transaction Type**.
Step 6: Click I don't use a clearinghouse/billing agency.

Step 7: Log in with your WCM Credentials.
Step 8: Enter your Trading Partner ID and click Validate.

Step 9: Click on the Line of Business for the enrollment you are adding.

Note: If you are adding a new Line of Business click Yes to add this combination to your Trading Partner ID.
Step 10: Click on Continue to Registration on the Mock Agreement.

Step 11: Enter in the Provider Tax ID.

Note: If you are enrolling for Medicare Part A or Part B, it will ask you for you group PTAN and NPI.
Step 12: Enter in the Billing/group NPI and click Validate.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Step 13: Enter in the Provider Contact information.
Step 14: Review Agreement and click **Complete & Submit**.

Step 15: Enter in your **Name** and click **Submit Agreement**.
Section 2.4 Adding New Trading Partner ID(s) for existing Trading Partners

This section will lead all Trading Partners (Healthcare Provider as Direct Submitting, Clearinghouse, Vendors, and Exempt trading Partners) through adding new Trading Partner ID to your existing corporation.

**Note:** If you are a Healthcare Provider, Clearinghouse, Vendor or Exempt Trading Partner and do not have an account in WCM or a current Trading Partner ID. See Chapter 2: Direct Trading Partner to become a Direct Trading Partner.

**Note:** Please select the correct section to complete the enrollment of new Trading Partner ID.
- Healthcare Providers adding new Trading Partner ID see Section 2.4.1
- Clearinghouse adding new Trading Partner ID see Section 2.4.2
- Vendors adding new Trading Partner ID see Section 2.4.3
- Exempt Trading Partner adding new Trading Partner ID see Section 2.4.4
Section 2.4.1 Health Care Provider adding a new Trading Partner ID to an existing account.

Step 1: To start EDI Express Enrollment “E3” click [HERE](#).

Step 2: Check the box I’m not a robot.

Step 3: Click on the pictures per the Captcha and click Verify.
Step 4: Click Enroll Now Button under Providers.

Step 5: Select the Electronic Transaction Type.
Step 6: Click I Don’t use a clearinghouse/billing agency.

Step 7: Log in with your WCM Credentials.
Step 8: Click on New Trading Partner ID.

Step 9: Enter in the Trading Partner Information for the new Trading Partner ID and click Next.
Step 10: Review Agreement and click **Sign & Submit**.

Step 11: Type your **Name** and click **Sign Agreement**.
Step 12: Create new Trading Partner ID.

**Note:** There are two ways to create a Trading Partner ID
- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.

Step 13: Select the Line of Business.


**Step 14:** Click **Continue** on the Mock Agreement.

**Step 15:** Enter in the **Healthcare Provider Information** (NPI if applicable) and click **Next**.

**Note:** If you are enrolling for Medicare Part A or Part B, it will ask you for your group PTAN and NPI. Also, PTAN will need to be capitalized.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.
Step 16: Enter in the Provider Contact and Business information and click Next.

Step 17: Click Sign to sign the Agreement.
**Step 18:** Review the Agreement and click **Complete and Submit.**

**Step 19:** Type your **Name** and click **Submit.**
Step 20 Check Box I Agree.

At this point you can do the Following:
1. Click Done >> Sign Selected agreements
2. Add another Provider to the Line of Business and Transaction agreement.
3. Add another Transaction
4. Add another Line of Business.

Note: When finished adding new Transactions, Providers, and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

Note: You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).

Step 28: Once you click Done >> Sign Selected Agreements, you will click Complete & Submit on the right.
Step 19: Type your Name and click **Sign Agreement**.

Electronic Signature

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

**Signature**

Type Name Here

Submit Agreement(s)

Continue Reading agreement(s)

**Note:** Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 2.4.2 Clearinghouse adding a new Trading Partner ID to an existing account.

Step 1: To start EDI Express Enrollment “E3” click HERE

Step 2: Check the box I’m not a robot.

Step 3: Click on the pictures per the Captcha and click Verify.
Step 4: Click **Enroll Now** under Agency & Vendors.

Step 5: Log in with your **WCM credentials**.
Step 6: Click **New Trading Partner ID**

Step 7: Enter in the **New Trading Partner Information** and click **Next**.
Step 8: Click Sign & Submit.

Step 9: Type Name and click Sign Agreement
Step 10: Create Trading Partner ID under Clearinghouse / Billing Agency.

**Note:** There are two ways to create a Trading Partner ID

- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.

Step 11: Enter in the Clearinghouse/Billing Agency Information and Contact info and click **Next**.
**Step 12:** Click **Sign & Submit** to sign the Clearinghouse Agreement.

**Step 13:** Type **Name** and click **Sign Agreement**.
Step 14: Select the **Type of Insurance or Benefits** for which you are enrolling.

Step 15: Select the **Electronic Transaction Type** you are enrolling.
Step 16: Click on Continue on the Mock Agreement.

Step 17: Enter in the Healthcare Provider Information (NPI if applicable) and click Next.

**Note:** If you are enrolling for Medicare Part A or Part B, it will ask you for your group PTAN and NPI. Also, PTAN will need to be capitalized.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Arise, Aspirus Arise, Family Care, and TriWest VA the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.
Step 18: Enter in the Healthcare Provider Contact Information and click Next.

Step 19: Click SIGN to sign the agreement.
Step 20: Click **Sign & Submit** on the right.

Step 21: Type your **Name** and click **Sign Agreement**.
Step 22: Check Box I Agree.

At this point you can do the Following:
1. Click Done >> Sign Selected agreements
2. Add another Provider to the Line of Business and Transaction agreement.
3. Add another Transaction
4. Add another Line of Business.

Note: When finished adding new Transactions, Providers, and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

Note: You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).

Step 30: Click Complete and Submit.
Step 31: Type Name click Submit Agreements.

Electronic Signature

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

Signature
Type Name Here

Submit Agreement(s)

Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 2.4.3 Vendor adding a new Trading Partner ID to an existing account.

**Step 1:** To start EDI Express Enrollment “E3” click [HERE](#).

**Step 2:** Check the box **I’m not a robot**.

**Step 3:** Click on the pictures per the Captcha and click **Verify**.
Step 4: Click **Enroll Now** under Agency & Vendors.

Step 5: Log in with your **WCM credentials**.
Step 6: Click **New Trading Partner ID**

Step 7: Enter in the **New Trading Partner Information** and click **Next**.
Step 8: Click Sign & Submit.

Step 9: Type Name and click Sign Agreement
Step 10: Create Trading Partner ID under Vendor.

**Note:** There are two ways to create a Trading Partner ID
- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.

Step 11: Select the **Type of Insurance or Benefits** for which you are enrolling.
**Step 12:** Select **Electronic Transaction Type** you are enrolling.

**Step 13:** Check Box **I Agree**.

At this point you can do the Following:

1. Click Done >> Sign Selected agreements
2. Add another Transaction
3. Add another Line of Business.
Note: When finished adding new Transactions; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

Note: You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).

Step 22: Click Complete and submit.

Step 23: Type Name and click Submit Agreement.

Electronic Signature

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

Signature

Type Name Here

Submit Agreement(s)

Continue Reading agreement(s)
**Note:** Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 2.4.4 Exempt Trading Partner adding a new Trading Partner ID to an existing account.

Step 1: Click Here to start the Registration process.

Step 2: Check the box indicating that “I’m not a robot”.

Step 3: Click the proper images to verify the Captcha and click Verify.
Step 4: Click Enroll Now under Agency & Vendors.

Step 5: Sign in with your WCM Credentials.
Step 6: Click New Trading Partner ID.

Step 7: Enter in the New Trading Partner Information and click Next.
Step 8: Click **Sign & submit**

Step 9: Type **Name** and click **Sign Agreement**.
Step 10: Enter in your trading partner exempt Code and click Validate.

**Note:** If you do not have the Exempt Code contact the EDI Department.

Step 11: Create your Trading Partner ID.

**Note:** There are two ways to create a Trading Partner ID

- **Self-Assigned ID** – You create a custom Trading Partner ID
  - Trading Partner ID can be up to 10 characters.
  - Spaces and special characters are prohibited.
  - All characters must be CAPITALIZED.
- **Auto Assign** - The system generates one for you.
Step 12: Select the **Insurance and Benefits** for which you are enrolling.

Step 13: Select the **Electronic Transaction Type** you are enrolling.
Step 14: Check Box I Agree.

At this point you can do the Following:

1. Click Done >> Sign Selected agreements
2. Add another Provider to the Line of Business and Transaction agreement.
3. Add another Transaction

Add another Line of Business.

Note: When finished adding new Transactions, Providers, and Lines of Business; Sign all agreements and check all boxes to agree to the terms and conditions, then Click Done >> Sign Selected Agreements.

Note: You may complete up to 35 enrollments at a time (adding Transactions, Providers or new Lines of Business).

Step 15: Click on Complete & Submit
Step 16: Type **Name** and click **Submit Agreement(s)**

**Electronic Signature**

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

**Signature**

Type Name Here

**Submit Agreement(s)**

**Note:** Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
**Section 2.5 Production Approval Request**

You will need to Test and request Production Approval for the following reasons:
- Become a brand-new Direct Trading Partner
- Creating a new Trading Partner ID
- Adding a new Line of Business to an existing and/or new Trading Partner ID

After a submitter has completed testing for the Line of Business/Transaction combination, the submitter must request approval to submit production 837 files.

This section will walk you through requesting Production Approval.

**Step 1:** Click [HERE](#) to start the Production Approval Request.

**Step 2:** Check the box I’m not a robot.

![Request Production Approval](image)

**Step 3:** Click on the correct images per the Captcha and click **Verify**.
Step 4: Enter in your Trading Partner ID and click Validate.

Step 5: Click the Line of Business for which you submitted the test file.
Step 6: Click the type of 837 test file you submitted.

Step 7: Enter in the **Transaction ID file name** of the file from Gateway Express, and click **Submit**.

**Note:** You will need to log into Gateway Express, go to your History tab to get the Transaction ID.
Step 8: Click on Complete & Submit.

Step 9: Enter in your Email Address and click Submit Request.

Note: Once complete you will receive an email confirmation for your production request.
Chapter 3: Electronic Transaction Enrollment

This Chapter will discuss and walk you through completing the EDI Claims Agreement, Electronic Remittance Advice Agreement (ERA), and Electronic Funds Transfer (EFT) Agreement for our Lines of Business as a Provider using a Clearinghouse or one of our Provider Portals.

Section 3.1 EDI Claims Submission Agreement

**Note:** If you are a Direct Trading Partner see Section 2.2 to add new Transaction Agreements

**Note:** An EDI Claims Transaction Agreement is required to submit claims to WPS.

Section 3.1.1 Enroll for EDI Claims submission as a Clearinghouse/Vender (Non-Provider)

**Step 1:** Click [HERE](#) to start the enrollment process.

**Step 2:** Click I’m not a Robot.
Step 3: Select all images per the Captcha and click Verify.

Step 4: Click Enroll Now as Agency & Vendor.

Step 5: Log in with credentials for WCM.
Step 6: Enter in your Trading Partner ID and click Validate.

Step 7: Click on the Line of Business you are enrolling.
Step 8: Click the on type of Agreement.

Please Select TXN

<table>
<thead>
<tr>
<th>EDI</th>
</tr>
</thead>
<tbody>
<tr>
<td>5010 276/277 Claim Status - Batch</td>
</tr>
<tr>
<td>5010 276/277 Claim Status - Real-Time</td>
</tr>
<tr>
<td>5010 820 Premium Payment Inbound</td>
</tr>
<tr>
<td>5010 834 Enrollment Inbound</td>
</tr>
<tr>
<td>5010 837 Institutional Claim Inbound (UB-04)</td>
</tr>
<tr>
<td>5010 837 Professional Claim Inbound (CMS 1500)</td>
</tr>
<tr>
<td>5010 270/271 Eligibility - Batch</td>
</tr>
<tr>
<td>5010 270/271 Eligibility - Real-Time</td>
</tr>
</tbody>
</table>

**Note:** If the Insurance/Benefit type is not found click YES to add it.

**Error Type - Combination Not Found**

**Insurance/Benefit Type and Transaction Combo Not Found**

The Insurance/Benefit and Transaction combination was not found in our system.

Would you like to add this LOB/TXN?

[Yes] [No]
Step 9: Click Continue to Registration.

Step 10: Enter in the Tax ID of the Provider and click Submit.

Note: If you are enrolling for Medicare Part A or Part B, it will ask you for you group PTAN and NPI. Also, PTAN will need to be capitalized.
Step 11: Enter in the NPI(s) of the Provider and click Validate.

Note: TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Step 12: Enter the Provider Contact and Address Information and click Save.
Step 13: Review Agreement and click **Complete and Submit**.

Step 14: Type your **Name** and click **Submit Agreement(s)**.

**Electronic Signature**

By typing my name below, I certify that I have reviewed the listed agreement(s), that the information contained in the EDI Registration Summary of each agreement is complete and accurate to the best of my knowledge, that I am authorized to request the identified transaction(s) and that I authorize said transaction(s).

**Signature**

Type Name Here

**Submit Agreement(s)**
Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 3.1.2 Enroll for EDI Claims Submission as a Provider when using a Clearinghouse/Vendor.

In this Section you will be walked through completing EDI Claims submission Agreement when you are using a Clearinghouse or vendor to submit claims.

**Note:** If you are using a Clearinghouse to submit claims you will need the following information:

- Trading Partner ID/Submitter ID of the Clearinghouse (You will get this from the Clearinghouse)
- First/Last Name, telephone number, and email address for a contact at the clearinghouse.
  (Your clearinghouse may want you to enter specific information, so check with them.)

**Step 1:** Click [Here](#) to start the connectivity Agreement.

**Step 2:** Click I’m not a Robot.
Step 3: Click on the correct images per the Captcha and click **Verify**.

Step 4: Click **Continue**.
Step 5: Click **Enroll Now** under Providers.

Step 6: Click on **5010 837 Institutional Claim** or **5010 837 Professional Claim**.
Step 7: Enter in the Trading Partner ID and Click Validate.

Step 8: Click on the Line of Business for which you are completing the agreement.
Step 9: Click **Continue** on the Mock Agreement.

Step 10: Enter Healthcare Provider contact information on the left and the Clearinghouse information on the right and click **Next**.
Step 11: Enter in the Provider Business Name and physical address and click Next.

Step 12: Enter in the Healthcare Provider Information (NPI if applicable) and click Next.

Note: If you are enrolling for Medicare Part A or Part B, it will ask you for you group PTAN and NPI. Also, PTAN will need to be capitalized.
Note: TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Step 13: Review the EDI Transaction Agreement and click Complete & Submit on the right.

Step 14: Type your Name and click Submit.
**Note:** Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 3.1.3 Enroll for EDI Claims Submission as a Provider when using WPS Lines of Business Portals.

WPS maintains different portals for our Lines of Business.

Click the link next to the Line of Business to see the instructions on what to input into the EDI Claims Submission Agreement to submit claims through the portal.

Below are the following portals that can be used Claims Submission.

- TRICARE East – [E3 Enrollment Portal Instructions](#)
- TRICARE For Life - [E3 Enrollment Portal Instructions](#)
- TRICARE Overseas - [E3 Enrollment Portal Instructions](#)
- TriWest VA Choice Program - [E3 Enrollment Portal Instructions](#)
- Medicare Part B - [E3 Enrollment Portal Instructions](#)

Step 1: Click [Here](#) to start the connectivity Agreement.

Step 2: Click I’m not a Robot.
Step 3: Click on the correct images per the Captcha and click **Verify**.

Step 4: Click **Continue**.
Step 5: Click **Enroll Now** under Providers.

Step 6: Click on **5010 837 Institutional Claim** or **5010 837 Professional Claim**.
Step 7: Enter in the Trading Partner ID and Click Validate.

**Note:** See Instructions for the appropriate Portal.

Step 8: Click on the Line of Business for which you are completing the agreement.
Step 9: Click **Continue** on the Mock Agreement.

Step 10: Enter your contact information on the left and the Clearinghouse information on the right per the instructions of the appropriate portal and click **Next**.
Step 11: Enter in the Provider Business Name and physical address and click **Next**.

Step 12: Enter in the **Healthcare Provider Information** (NPI if applicable) and click **Next**.

**Note:** You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.
Step 13: Review the EDI Transaction Agreement and click **Complete & Submit** on the right.

Step 14: Type your Name and click **Submit**.
Note: Once signed you will come to this screen; at which time you either click ‘Continue Enrolling’ or ‘No Thanks, I’m Done’.

Note: You will receive a Secured Message from EDI@wpsic.com with a copy of all your agreements that you have enrolled.
Section 3.2 ERA Electronic Remittance Advise Agreement

The ERA replaces the paper version of the Remittance Advice (RA). WPS delivers 5010 835 versions of all remittance files that are compliant with the Health Insurance Portability and Accountability Act (HIPAA). You can receive your ERA directly from WPS or through your clearinghouse.

**Note:** Please click [HERE](#) for more information on ERA Agreements.

**Note:** TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

**Note:** You may use EnrollHub, a CAQH EFT/ERA Solution™. EFT/ERA for the Medicare and TRICARE Overseas payers is not managed through EnrollHub™.
Section 3.2 EFT Electronic Funds Transfer Agreement

When you enroll in EFT, WPS claims payments are deposited directly in the bank account(s) of your choice.

Note: Please click HERE for more information on EFT Agreements.

EFT Payment transactions are reported with file format CCD+, which is the recommended industry standard for EFT payments. The CCD+ format is a NACHA Automated Clearing House (ACH) corporate payment format with a single, 80-character addendum record capability. The addendum record is used by the originator to provide additional information about the payment to the recipient. This format is also referenced in the ERA 835 data file. Contact your financial institution if you would like to receive this information. Fees may be associated with EFT payments. Consult with your financial institution for specific rates.

Note: TRICARE East, TRICARE For Life, WPSHI, Aspirus, Arise, and TriWest the NPI is optional. If you enter the NPI, only locations linked to that TAX ID/NPI combination will be set up.

Note: You may use EnrollHub, a CAQH EFT/ERA Solution™. EFT/ERA for the Medicare and TRICARE Overseas payers is not managed through EnrollHub™.