



# **TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream®**

## **Configuration**

Version 1.0.0 | October 2023

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# Introduction to HIPAA Protocol

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This section briefly describes the HIPAA mandated X12 transactions and their use for electronic data interchange (EDI). For a complete description of HIPAA and the mandated X12 transactions, refer to the HIPAA Educational Materials on the CMS website:

<http://www.cms.hhs.gov/EducationMaterials>.

For a complete description of the X12 EDI standard, refer to the standard itself, which can be found at the Data Interchange Standards Association (DISA) website:

<http://www.disa.org>.

## Overview

The **H**ealth **I**nsurance **P**ortability and **A**ccountability **A**ct of 1996, known as "HIPAA" is a federal law that covers a number of important health care issues, such as providing consumers with greater access to health care insurance, and ensuring the privacy of healthcare data. The law also includes measures designed to reduce administrative costs in the healthcare industry by providing standards for electronic transactions between the various entities within the industry, such as health care providers and insurers.

The Administrative Simplification portion of the law deals with electronic transactions and code sets requirements. TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream® provides additional functionality for TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® customers to be compliant with the electronic transactions and code sets requirements of the Administrative Simplification portion of HIPAA.

BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream also provides validation of National Provider Identifiers (NPI), which is another part of HIPAA's Administrative Simplification.

## Electronic Transactions

HIPAA transactions are the electronic transfer of health care information for specific purposes. Under HIPAA, if a health care provider engages in one of the identified

transactions, they must comply with the standards for that transaction. HIPAA requires every provider who does business electronically to use the same health care transactions, code sets, and identifiers.

The electronic transaction standards for the healthcare industry are specified by the ASC X12N Subcommittee of The American National Standards Institute (ANSI) and the National Council for Prescription Drug Programs (NCPDP). The NCPDP standard formats are used by retail pharmacies for drug claim transactions.

The following is a list of the electronic transaction standards mandated by HIPAA:

- For claims or encounters:
  - ASC X12N 837 Institutional (versions 4010X096A1 and 5010X223A2)
  - ASC X12N 837 Dental (versions 4010X097A1 and 005010X224A2)
  - ASC X12N 837 Professional (versions 4010X098A1 and 005010X222A1)
- For Remittance Advice
  - ASC X12N 835 (versions 4010X091A1 and 005010X221A1)
  - ASC X12N 820 (versions 4010X061A1 and 005010X218)
- Eligibility Inquiry and Response
  - ASC X12N 270 (versions 4010X092A1 and 5010X279A1)
  - ASC X12N 271 (versions 4010X092A1 and 5010X279A1)
- Prior Authorization and Referral
  - ASC X12N 278 (versions 4010X094A1 and 005010X217)
- Claims Status Inquiry and Response
  - ASC X12N 276 (versions 4010X093A1 and 005010X212)
  - ASC X12N 277 (versions 4010X093A1 and 005010X212)
- Benefit Enrollment and Maintenance
  - ASC X12N 834 (versions 4010X095A1 and 005010X220A1)
- NCPDP retail pharmacy transactions (version 5.1 for telecommunications, version 1.1 for batch transactions)

## Document Structure

HIPAA transactions are specialized versions of X12 transactions. As such, a HIPAA document has the same structure and uses the same delimiters as the X12 document. To understand the structure of an X12 document and the use of delimiters in the X12 document, see the "Document Structure and Delimiters" topic in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

## Acknowledgments

The information in the section on Acknowledgments in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration* also applies to HIPAA transactions.

Additionally, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream supports application level acknowledgments that are used to provide the validation results on the HIPAA-specific business rules for a transaction. For more information about the application level acknowledgments that are specific to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, see [HIPAA Acknowledgement Properties](#).

## Design Time Validation of HIPAA Transactions

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream is used for runtime validation of HIPAA electronic transactions. For design time validation of HIPAA electronic transactions, use TIBCO Foresight® HIPAA Validator® Desktop.

To use the guidelines provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream in TIBCO Foresight® HIPAA Validator® Desktop, you need to copy the HIPAA guidelines from BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream into the appropriate directory for TIBCO Foresight® HIPAA Validator® Desktop.

Example: For design time validation of a version 4010 837 Professional transaction, perform the following:

```
Change directory to bcce-edihipaa-1.0.0_
InstallerFolder>/samples/sampleDocs/guidelines/4010_txns copy PDSA837P.std
to configuration folder of bcce-cms container.
```

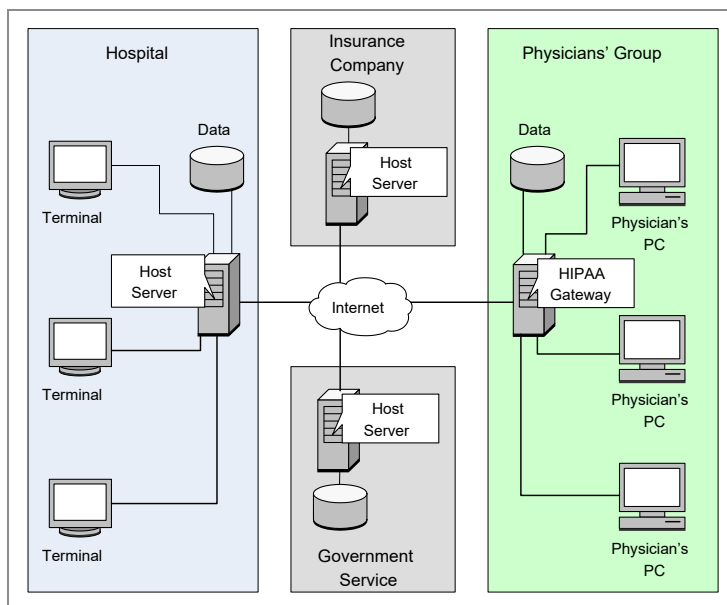
See TIBCO Foresight® HIPAA Validator® Desktop documentation for directions on how to use the product to perform validation.

To see a list of the guidelines for each HIPAA transaction, see [HIPAA Transaction Configuration](#).

## HIPAA Architecture

The following figure shows the HIPAA architecture in which a variety of organizations exchange HIPAA X12 transactions.

*Figure 1: HIPAA Architecture*

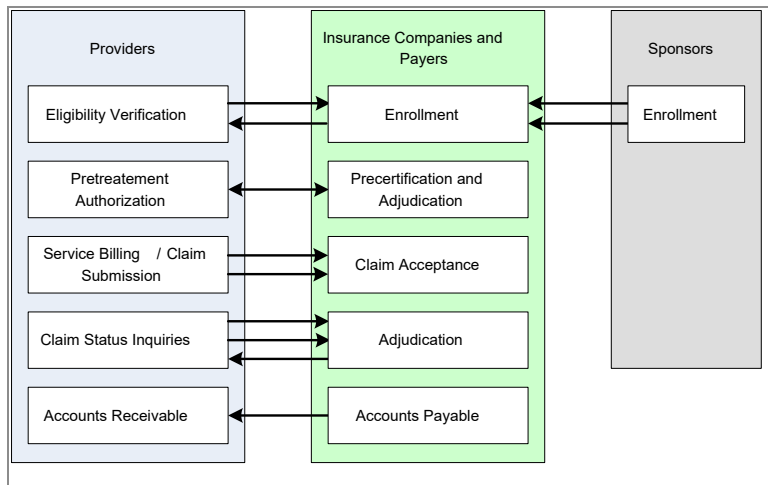


## HIPAA Transactions Business Model

The following figure shows the HIPAA transactions business model.



Figure 2: HIPAA Transaction Business Model



## HIPAA Types of Testing

There are seven types of testing recommended for HIPAA transactions. The seven types of testing are those defined in the Transaction Compliance and Certification white paper from WEDI-SNIP.

The following information on testing types is from that white paper.

- Type 1: EDI Syntax Integrity Testing:** To test an EDI file for valid segments, segment order, element attributes, and numeric values in numeric data elements, validation of X12 syntax, and compliance with X12 rules.
- Type 2: HIPAA Syntactical Requirement Testing:** To test for HIPAA Implementation Guide-specific requirements, such as repeat counts, used and not used codes, elements and segments, required or intra-segment situational data elements. Testing for non-medical code sets as laid out in the implementation guide and values noted in the Implementation Guide through the X12 code list or table.
- Type 3: Balancing:** To test the transaction for balanced field totals, financial balancing of claims or remittance advice, and balancing of summary fields, if appropriate.
- Type 4: Situation Testing:** The testing of specific inter-segment situations described in the HIPAA Implementation Guides, such that if A occurs then B must be populated. This is considered to include the validation of situational fields given values or situations present elsewhere in the file.

Example: If the claim is for an accident, the accident date must be present.

- **Type 5: External Code List Testing:** To test for valid Implementation Guide-specific code list values and other code sets adopted as HIPAA standards. This level of testing not only validates the code sets but also makes sure that the usage is appropriate for any particular transaction and appropriate with the coding guidelines that apply to the specific code list. Validates external code sets and tables such as CPT, ICD9, CDT, NDC, status codes, adjustment reason codes, and their appropriate use for the transaction.
- **Type 6: Product Types or Line of Service Testing:** This testing is required to ensure that the segments or records of data that differ based on certain healthcare services are properly created and processed into claims data formats. These specific requirements are described in the Implementation Guide for the different product types or lines of service.

Example: Ambulance, chiropractic, podiatry, home health, parenteral and enteral nutrition, durable medical equipment, psychiatry, and other specialized services have specific requirements in the Implementation Guide that must be tested before putting the transaction in production. This type of testing only applies to a trading partner candidate that conducts transactions for the specific line of business or product type.

- **Type 7: Implementation Guide-Specific Trading Partners:** The Implementation Guides contain some HIPAA requirements that are specific to Medicare, Medicaid, and Indian Health. Compliance or testing with these payer specific requirements is not required from all trading partners. If the trading partner candidate intends to exchange transactions with one of these Implementation Guide special players, this type of testing is required. When a certification service certifies a trading partner for compliance, the certification service must indicate whether these payer specific requirements were met during the certification process. Other payers and trading partners may have their own specific business requirements. But unless they are listed in the HIPAA Implementation Guides, they are not HIPAA requirements. These non-HIPAA trading partner specific requirements must be tested as part of the business-to-business testing.

Type 1 testing is the validation that is normally performed by BusinessConnect™ Container Edition - EDI Protocol powered by Instream.

Types 2 through 7 are extra levels of validation performed by BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream.

# HIPAA Validation Error Severity

By default, any validation errors that occur cause a transaction to be rejected. When a transaction is rejected, the 997 generated contains the AK5 segment with a Transaction Set Acknowledgement Code of 'R' for the transaction. When validating HIPAA transactions, it is desirable to be able to control whether a validation error should cause the rejection of the entire transaction or not.

Sometimes we might want the error reported and the transaction rejected. At other times we might want to report the error in the 997 but to accept the transaction anyway (for example, the generated 997 would have a Transaction Set Acknowledgment Code of 'E' for accepted with errors). We might want validation errors ignored altogether or we might want only some validation errors ignored.

In conjunction with TIBCO Foresight® HIPAA Validator® Desktop, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream provides the ability to configure the severity of validation errors that occur in HIPAA transactions.

Controlling the severity of validation errors is done through the use of validator profile files. For more information about creating and configuring validator profile files to use with X12 transactions, see the "Configuring Validation Profile (.apf) Files" section in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*. The remainder of this section contains information on validator profile files that is specific to HIPAA transactions.

## Error Severity Types

The following are the segments in the generated 997 acknowledge when a transaction is rejected:

```
ST~997~0001'  
AK1~HC~000000001'  
AK2~837~000000001'  
AK3~CLM~36~2300~8'  
AK4~11+3~1362~1~AP'  
AK5~R'  
AK9~R~1~1~0'  
SE~9~0001'
```

The following are the segments in the generated 999 acknowledge when a transaction is rejected:

```

ST~999~0001'
AK1~HC~1'
AK2~837~Transacti~000000000001'
IK3~NM1~7~2010~8'
IK4~3~1035~5~NN'
IK5~R~5'
AK9~R~1~1~0'
SE~8~0001'

```

The AK2 segment identifies the transaction that is rejected. The AK3/IK3 and AK4/IK4 segments give information about where one or more errors occurred in the transaction. The AK5/IK5 segment indicates that the transaction is rejected and contains a transaction status code of 'R'. The AK9 segment indicates that the group is rejected, 'R', because there was only one transaction in the group and that transaction is rejected.

If some of the transactions in the group are accepted while others are rejected, the status of the group in the AK9 segment would be 'P', which indicates that at least one transaction in the group is rejected.

When a transaction is rejected, error information is also sent to the private process on the subject `AX.BCCE.INSTALLATION.X12.ERROR.VALIDATION`.

This error information contains the transaction ID of the transaction that has validation errors and descriptive information about the validation errors similar to the following:

```

controlNumInfo={^class^="ControlNumberInfo
" ^idx^=1 interchange="000008361" group="1" transaction="000000001"}
errorInfoList={^class^="ConversionEngineInfo" ^idx^=2 ^1^=
{^class^="ConversionEngineInfo" ^idx^=1 errorSeverity="Normal"
errorCategory="Rejecting" errorMsg="The Previous Claim does not balance.
Formula used CLM02 (93534) = sum of SV102 (93533)." errorID="30092"
errorContext="Loop/Group-2440 | Segment-HL" errorDataParent="HL~4~2~2
3~0'" errorSegmentCount=178 errorLoopGroupCount=1}}

```

Setting different error severity types to validation errors affect the information about the validation errors that is contained in 997/999 acknowledgements and the error information reported to the private process. It also affects whether the given transaction is converted from EDI to XML or from XML to EDI. When a transaction is rejected, no conversion takes place.

The following table describes the four levels of severity that can be configured for validation errors and their effect on how error information is reported.

**Error Severity Types**

<b>Error Severity Type</b>	<b>997/999 Acknowledgement</b>	<b>Error Information to Private Process</b>	<b>Data Conversion Occurs?</b>
Ignore	AK5/IK5 segment reports transaction status of 'A' for accepted. AK3/IK3 and AK4/IK4 segments are not present.	Does not cause the generation of an error report to the private process.	Yes
Informational	AK5/IK5 segment reports transaction status of 'A' for accepted. AK3/IK3 and AK4/IK4 segments are not present.	<p>The cause of the error is reported in the message to the private process with the error code and a description of the error.</p> <p>The error description begins with Information.</p>	Yes
Warning	AK5/IK5 segment reports transaction status of 'E' for accepted with errors. AK3/IK3 and AK4/IK4 segments contain information about the location of the error in the transaction as appropriate.	<p>The cause of the error is reported in the message to the private process with the error code and a description of the error.</p> <p>The error description begins with Warning.</p>	Yes
Error	AK5/IK5 segment reports transaction status of 'R' for rejected. AK3/IK3 and AK4/IK4 segments contain information about the location of the error in the transaction as	The cause of the error is reported in the message to the private process with the error code and a description	No

Error Severity Type	997/999 Acknowledgement	Error Information to Private Process	Data Conversion Occurs?
	appropriate.	of the error.	
Fatal		Similar in behavior to the 'Error' type but is used for system errors.	No

## Control Validation Severity Levels

How the validation engine reports the severity of errors is controlled by creating and configuring Validator Profile (.apf) files. Either TIBCO EDISIM Validator or TIBCO Foresight® HIPAA Validator® Desktop can be used.

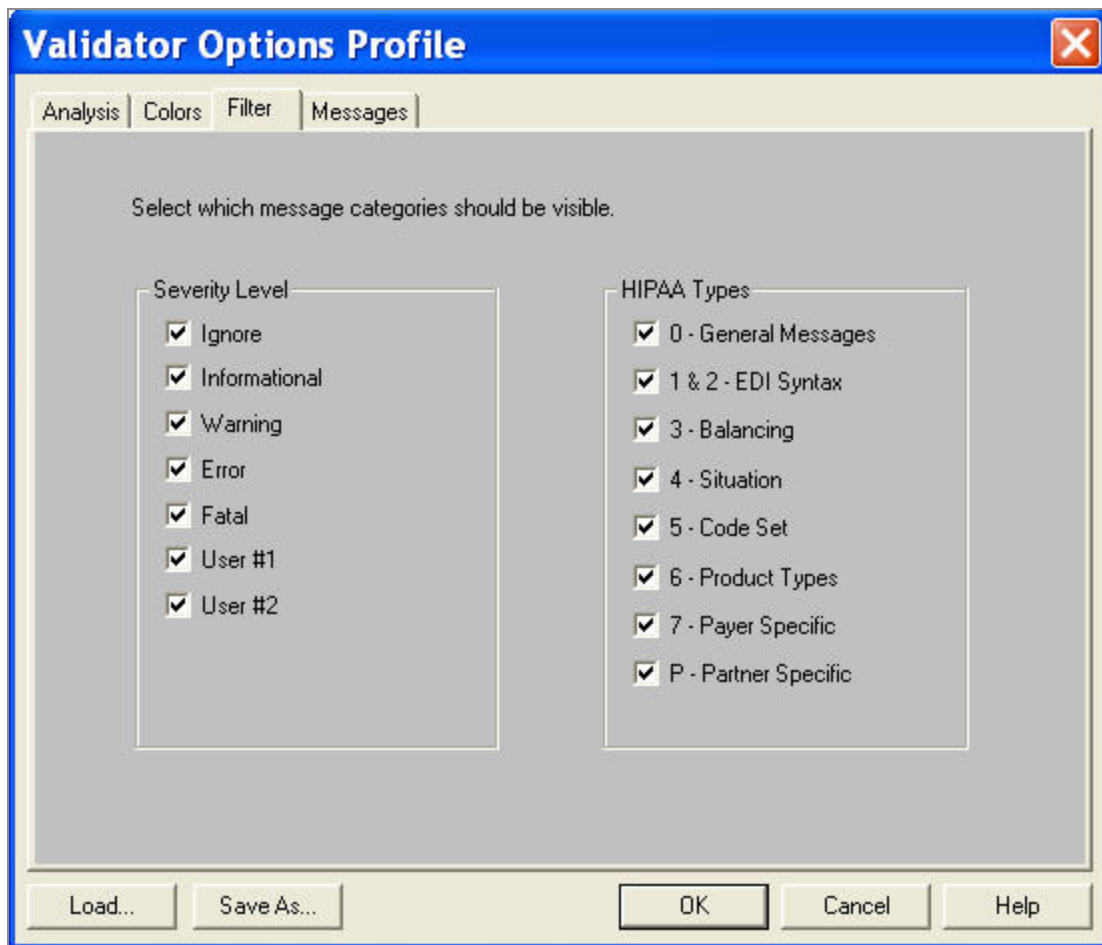
After Validator is started, to create a profile file with your custom settings, perform the following steps:

### Procedure

1. Go to **Options > Validator Profile**.
2. Select the **Filter** tab.

The Filter tab has two groups of settings: Severity Level and HIPAA Types, as shown in the following figure.

Figure 3: Validator Options Profile



By default, all of the Severity Levels listed are selected, which means all of these categories of errors are included and reported when validating transactions.

## Suppress Severity Level

To cause the validation engine to suppress a particular severity level, perform the following steps:

### Procedure

1. Clear the desired severity level checkboxes.
2. Click **Save As**.
3. Specify the location and name to use for the .apf file.
4. Use the BusinessConnect Operations Editor to upload the .apf file into the

configuration for the transaction you want to apply the .apf file during its validation.

Example: For the validation engine, to ignore warning errors during validation of a 00401/004010X098A1/837 transaction, clear the checkbox next to **Warning** in the **Validator Options Profile** dialog, save the profile, and then add the .apf file to the configuration of the 00401/004010X098A1/837 transaction in the Operations Editor.

## Suppress HIPAA Type

The HIPAA Types settings are used to let the validation engine know the types of HIPAA errors to include during the validation of transactions.

By default, all the HIPAA Types are included during validation. clearing a HIPAA type indicates that the validation engine should ignore errors of that type during its validation of a transaction.

Example: To prevent balancing errors from causing a transaction to fail validation, clear the checkbox next to **3-Balancing**.

## Controlling Severity by Error ID

With validator profile (.apf) files, you can control the severity and HIPAA type of a particular error.

After Validator is started, create a profile file with the settings that change the default behavior for a particular error ID.

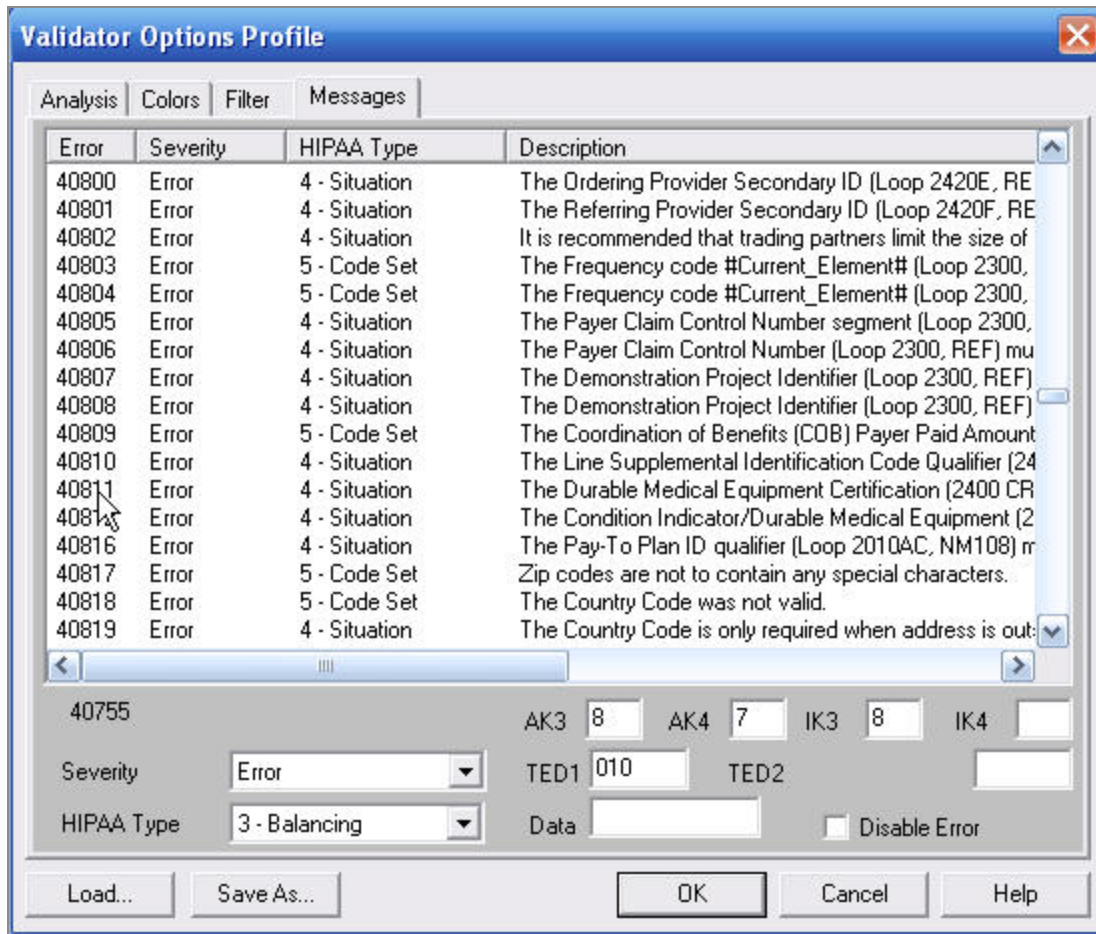
### Procedure

1. Go to **Options > Validator Profile**.
2. Select the **Messages** tab.

The Validator Options Profile dialog appears:



Figure 4: Validator Options Profile Messages



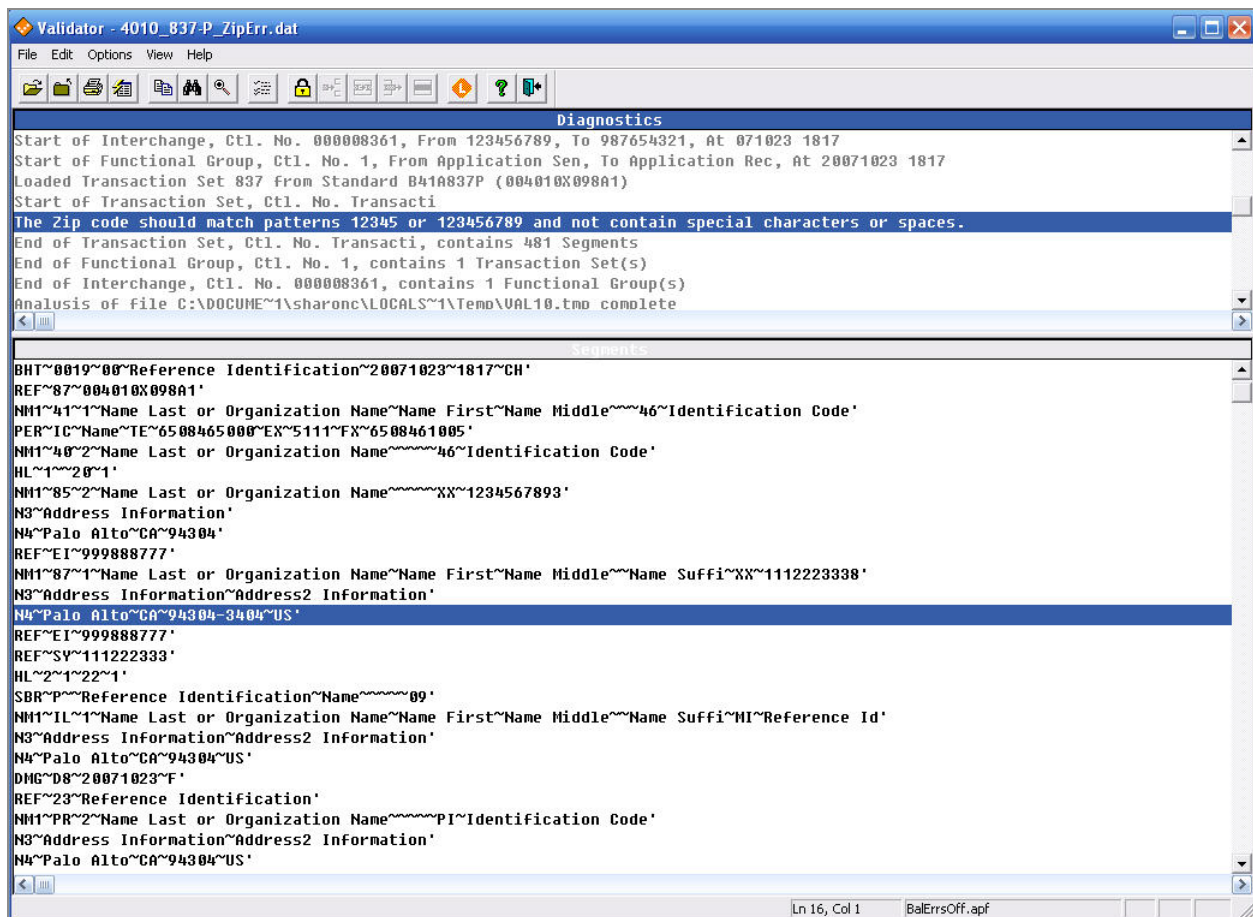
3. Select the line with the error for which you want to change the settings.
4. From the **Severity** dropdown, select the severity level to apply to the error.
5. From the **HIPAA Type** dropdown, select the HIPAA type to apply to the error.
6. Click **Save As**.
7. Specify the location and name to use for the .apf file.

Use the BusinessConnect Container Edition's Operations Editor to upload the .apf file into the configuration for the transaction you want to apply the .apf file during its validation.

When using TIBCO Foresight® HIPAA Validator® Desktop to perform design time validation of data files, it is also possible to create or modify .apf files to control the validation results you see during your design time validation, and then apply the .apf file to your BusinessConnect Container Edition configuration.

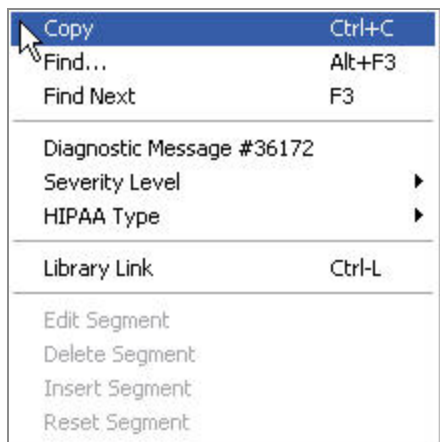
Sometimes, it is easier to determine the error ID, for which you need to specify new settings when you validate the data file using TIBCO Foresight® HIPAA Validator® Desktop. In this case, select the error when it is displayed and specify the settings to use. For example, if you used TIBCO Foresight® HIPAA Validator® Desktop to validate a 004010X098A1 837 Professional data file that contains an error in the format of the zip code, at the end of validation you would see something similar to as shown in the following figure:

Figure 5: Desktop Validator Diagnostic Message



By selecting the error message in the Diagnostic message pane and then right-click, you see the following menu options as shown in the following figure:

Figure 6: Diagnostic Message Options



The menu options display the error message ID associated with the selected error and also you can set the Severity Level and HIPAA Type to associate with that error ID.

## Save the .apf file after configuring new settings for an error ID

After you configure new settings for an error ID, save the .apf file created by these actions by performing the following steps:

### Procedure

1. Go to **Options > Save Profile**.
2. Specify the location and name to use for the .apf file.
3. Use the BusinessConnect Container Edition's Operations Editor to upload the .apf file into the configuration for the transaction you want to apply the .apf file during its validation.

## De-identifying a File

To protect the private information of individuals, it is sometimes necessary to de-identify the patient information in HIPAA transactions. At present, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream does not provide a tool to de-identify the patient data in HIPAA transactions. It is recommended to use one of the freely available de-identification tools available in the market.

# HIPAA External Code Lists

The X12 specifications identify standard code lists is used to determine the correct values for the various data elements of X12 transactions. The HIPAA Implementation Guides or Type 3 Technical Reports (TR3s) specify the code list values that should be used for the data elements of HIPAA transactions.

The HIPAA Implementation Guides or TR3s can specify various types of code lists. For example, a code list could be:

- a subset of the allowed values specified in the X12 specifications.
- or
- a new code list to apply to a data element, which previously had no code list applied to it.

In some cases, the HIPAA Implementation Guides for TR3s specify the exact codes to use for a particular code list. In other cases, the HIPAA Implementation Guides for TR3s refer to existing sets of codes that are maintained by various organizations throughout the government and health care industry.

The code lists, which are maintained by these various organizations are referred to as external code lists. Some of the external code lists are freely available (for example, external code list #139–Claim Adjustment Reason Codes). Other external code lists must be purchased from the organization that maintains the code list (for example, external code list #6–D-U-N-S Numbers). For more information about external code list sources, refer to Appendix C, External Code Sources, of the HIPAA Implementation Guides or Appendix A, External Code Sources, of the HIPAA TR3s. These appendices list the external code lists used by the transaction and the organization responsible for maintaining each code list.

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream contains most of the HIPAA external code lists. The HIPAA external code lists are used in guidelines, which are provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, to provide type 5 validation of the HIPAA transactions. The external code lists are not contained in the guidelines but are referenced in the guidelines through the following external files:

*TIBCO\_HOME/instream/version\_number/bin/fs\_hipaa.dat*

*TIBCO\_HOME/instream/version\_number/bin/fs\_cci.dat*

*TIBCO\_HOME/instream/version\_number/bin/fs\_occi.dat*

## Missing External Code Lists

For some external code lists specified in the HIPAA transaction Implementation Guides or TR3s, there is not an associated external code list in the HIPAA transaction guidelines supplied with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.

Some of the external code lists specified in the HIPAA transaction Implementation Guides or TR3s are actually comprised of other external code lists. Another external code list is listed in the HIPAA transaction Implementation Guides or TR3s but is not actually used by any transaction. These code lists are listed in the following table:

### External Code Lists Without Codelists

Code List	Description
60	<p>Depository Financial Institution (DFI) Identification Number. This code list is composed of two other code lists. A qualifier specifies which of the two code lists is used when specifying the DFI Identification Number.</p> <p>The following two code lists can be used to specify the DFI Identification Number:</p> <ul style="list-style-type: none"> <li>• <b>4</b> ABA Transit Routing Number</li> <li>• <b>91</b> Canadian Bank Branch and Institution Number</li> </ul>
77	X12 Directories. This external code list is not used by any HIPAA transaction. It is used in 997 Functional Acknowledgements.
94	International Organization for Standardization (Date and Time). This code list does not contain actual values, but specifies the time format to use. The time zone codes are included as an internal code list based on X12 standards.
158	<p>Health Care Financing Administration (HCFA). This code list is used in the Interchange header for the 820 transaction.</p> <p>The EDI Conversion Engine does not perform data validation against external code lists for the envelope segments (interchange and group) of the EDI data. It is the responsibility of the user to make sure that the information they configure for the interchange and group headers is correct.</p>

## External Code Effective Dates

When a new revision of an external code list is released, the external code list file associated with the newly released external code list revision is updated to reflect any new codes or modifications to existing codes. For new codes, if an effective date is specified, that date is used as the effective start date for the new code.

The effective date for a code is used to determine whether the code is valid for use by HIPAA transactions. If a code used in a HIPAA transaction is found to be outside of the code's effective date range, a validation error occurs. The date used in the HIPAA transaction for comparing against a code's effective date is determined as follows:

- Transaction Date: For non-medical code lists, the effective date of a code is compared to the transaction date.
- Date of Service: For medical code lists, the effective date of the code is compared to the date of service specified in the transaction.

## Update Frequency

Each HIPAA external code list has its own update frequency. Some external code lists are updated yearly, others are updated quarterly, and some are updated daily. Each release of BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream contains the latest updates to the external code lists.

If you require more timely versions of external code lists, you can obtain external code list updates by contacting TIBCO Support.

You can also create and register external code list updates as a User External Code List. For more information, see [User External Code Lists](#).

## User External Code Lists

With BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, you can change or add to existing code tables, and add completely new code tables to use for validation. Using this feature, you can:

- Temporarily add an invalid code to an existing external code list until your trading partners fix their use of the invalid code.

- Augment an external code list and add a custom code that is not normally part of the code list.
- Add new codes that have been released but have not yet been incorporated into BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
- Override the settings for existing codes.

By default, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream searches for user external code lists in the file:

```
TIBCO_HOME/instream/version_number/bin/SampleUserTable.txt
```

After installation, this file is empty and has a length of zero (0). The following sections explain how to edit this file to customize the use of external codes during validation.

For more information about managing custom external codes and code lists, see the document *Changing Desktop and Instream Code Tables* in the following file of your TIBCO Foresight® HIPAA Validator® Desktop installation: *HIPAA Validator Home/Doc/ExtendingCodeTables.pdf*

This document also contains the current list of code table names.

## Adding External Codes

To add your own custom codes to be used during validation, edit the file `SampleUserTable.txt` and add your custom codes by adding lines to the file using the following format:

```
^USER<code table name>
<code>|<start date>|<end date>|<code description>
```

The *start date* and *end date* must be in the format `yyyymmdd`. If left blank, use of the specified code is always allowed.

Example: To add a custom ZIP code that can be used regardless of transaction date, add the following line to the `SampleUserTable.txt` file:

```
^USERZip
99999|||Special zip code with no start or end date
```

## Deleting External Codes

To delete an external code from an existing code table, edit the file `SampleUserTable.txt` and add entries that specify the codes to be deleted using the following format:

```
^USER<code table name>  
<code>|del|<end date>|<code description>
```

Specifying a code to be deleted uses the same format as is used for specifying a code to be added except that *'del'* is specified as the *<start date>*. When deleting codes, anything entered for the *<end date>* and *<code description>* are ignored.

Example: To indicate that the use of zip code 94304 should be invalid, add the following lines to the `ELCTable.txt` file:

```
^USERZip  
94304|del||
```

## Disabling an External Code List

With BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, you can disable the use of an entire code list during validation.

To disable an entire code list, enter the following in the `SampleUserTable.txt` file:

```
^<code table name> %DISABLE%
```

Example: To disable the use of Taxonomy Codes, enter the following in the `SampleUserTable.txt` file:

```
^TaxonomyCodes %DISABLE%
```



# HIPAA Transaction Configuration

---

This section describes how HIPAA transactions are configured in the BusinessConnect Container Edition's Operations Editor.

## Overview

To exchange HIPAA transactions using BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, you must configure a transaction in the Operations Editor to associate with each transaction to be exchanged. For more information about this process, see the "Operations Editor" section in the document *TIBCO BusinessConnect™ Container Edition Trading Partner Management*.

Since HIPAA transactions are specialized versions of X12 transactions, you should also review the X12 specific information for configuring operations in Managing X12 Interchanges, Functional Groups, and Transactions, and Transactions in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

After you understand how to configure X12 transactions, read the sections in this manual that provide information specific to the configuration of HIPAA X12 transactions.

## Transaction Configuration Files

To configure a HIPAA transaction in the Operations Editor, the following files are needed for each transaction:

- HIPAA Transaction Guideline
- HIPAA Transaction Schema
- HIPAA Transaction Map File for EDI to XML or EDI to Text Conversion
- HIPAA Transaction Map File for XML to EDI Conversion

The HIPAA transaction guidelines contain rules that are used to validate HIPAA X12 transactions according to the HIPAA Implementation Guides (IGs) or Type 3 Technical

Reports (TR3s). The HIPAA transaction guidelines provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream are located in multiple locations:

- *BCCE-1.3.0\_Home/images/services/cms/bcce-cms/config* and *BCCE-1.3.0\_Home/images/services/is/bcce-is/config*
- Fsrest mount path
- *bcce-edihipaa-1.0.0\_InstallerFolder>/samples/sampleDocs/guidelines*

The HIPAA transaction schemas contain the definition of the XML that can be used by the backend process for handling HIPAA transaction data. The schemas associated with the HIPAA transaction guidelines provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder>/samples/sampleDocs/schemas*

The HIPAA transaction map files are used by the EDI conversion engine to convert HIPAA transaction EDI data into XML and the reverse. The HIPAA transaction map files can also be used to convert HIPAA transaction EDI data into textual data.

The map files associated with the HIPAA transaction schemas provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder>/samples/sampleDocs/maps*.

The map files, which contain the mapping for converting from XML to EDI data have file names of the form *schema\_name\_XE.map*. The map files used for converting inbound EDI data into XML data have file names of the form *schema\_name\_EX.map*.

Notice that the names of the HIPAA transaction schemas and maps files are similar to each other but they are not similar to the names of the HIPAA transaction guidelines. This is because the HIPAA transaction schemas and maps files are created using TIBCO EDISIM Standards Editor, which cannot read the HIPAA transaction guidelines because the rules in the guidelines are encrypted. So to create the HIPAA transaction schemas and maps files, you must use the unencrypted guideline from TIBCO EDISIM, which only contains level 1 and 2 syntax checks but not the level 3 and above HIPAA validation rules.

The following table lists the TIBCO EDISIM guideline used to generate the schemas and map files for each HIPAA transaction.

**TIBCO EDISIM Guidelines**

<b>HIPAA Transaction</b>	<b>HIPAA Guideline</b>	<b>EDISIM Guideline</b>
00307/003070X070A1/277	PDSA3070277UX070A1.std	277-X070A1
00401/004010X092A1/270	PDSA270.std	270AA120
00401/004010X092A1/271	PDSA271.std	271AA120
00401/004010X093A1/276	PDSA276 .std	276AA120
00401/004010X093A1/277	PDSA277.std	277AA120
00401/004010X094A1/278 (RQ)	PDA278RQ.std	278AREQ
00401/004010X094A1/278 (RSP)	PDA278RP.std	278ARES
00401/004010X061A1/820	PDSA820.std	820AA120
00401/004010X095A1/834	PDSA834.std	834AA120
00401/004010X096A1/837 (I)	PDSA837I.std	837AQ320
00401/004010X097A1/837 (D)	PDSA837D.std	837AQ220
00401/004010X098A1/837 (P)	PDSA837P.std	837AQ120
00404/004040X167/277	PDSA4040277UX167.std	277-X167
00405/004050X150/277	PDSA4050277X150.std	277-X150
00405/004050X151/275	PDSA4050275X151.std	275-X151
00405/004050X166/824	PDSA4050824X166.std	824-X166
00501/005010X279A1/270	PDSA5010270X279.std	270-X279
00501/005010X279A1/271	PDSA5010271X279.std	271-X279

HIPAA Transaction	HIPAA Guideline	EDISIM Guideline
00501/005010X212/276	PDSA5010276X212.std	276-X212
00501/005010X212/277	PDSA5010277X212.std	277-X212
00501/005010X217/278 (RQ)	PDSA5010278X217Q.std	278X217Q
00501/005010X217/278 (RSP)	PDSA5010278X217R.std	278X217
00501/005010X218/820	PDSA5010820.std	820-X218
00501/005010X220A1/834	PDSA5010834.std	834-X220
00501/005010X221A1/835	PDSA5010835.std	835-X221
00501/005010X222A1/837 (P)	PDSA5010837P.std	837-X222
00501/005010X223A2/837 (I)	PDSA5010837I.std	837-X223
00501/005010X224A2/837 (D)	PDSA5010837D.std	837-X224
00501/005010X214/277	PDSA5010277CAX214.std	277CA-X214
00501/005010X186A1/824	PDSA5010824X186.std	824-X186
00501/005010X210/275	PDSA5010275X210.std	275-X210
00501/005010X213/277	PDSA5010277X213.std	277-X213

## HIPAA Example Interfaces

The example interfaces provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream demonstrate how to configure the HIPAA transactions. The following example interfaces are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder/samples/interfaces*

- HIPAA-00401.csx - example interface for version 4010 HIPAA transactions with Addenda updates.

- HIPAA-00501.csx - example interface for version 5010 HIPAA transactions
- HIPAA-Ack-00307-277.csx - unsolicited 277 acknowledgement example
- HIPAA-Ack-00404-277.csx - 277 claim acknowledgement example
- HIPAA-Ack-00501-277.csx - 277 claim acknowledgement example
- HIPAA-Ack-00405-824.csx - 824 Application Advice acknowledgement example
- HIPAA-Ack-00501-824.csx - 824 Application Advice acknowledgement example
- HIPAA-HL7-00405-275-277.csx - HL7 claims attachment example
- HIPAA-HL7-00501-275-277.csx - version 5010 HL7 claims attachment example
- HIPAA-RT-00401-270-271.csx - synchronous request/reply example
- HIPAA-RT-00401-276-277.csx - synchronous request/reply example
- HIPAA-RT-00501-270-271.csx - version 5010 synchronous request/reply example
- HIPAA-RT-00501-276-277.csx - version 5010 synchronous request/reply example

The guidelines used in the example interfaces are in the directory: *BC\_HOME\protocols\tibedi\samples\sampleDocs\guidelines*

The guidelines used in the example interfaces are available in multiple locations:

- *BCCE-1.3.0\_Home/images/services/cms/bcce-cms/config* and *BCCE-1.3.0\_Home/images/services/is/bcce-is/config*
- Fsrest mount path
- *bcce-edihipaa-1.0.0\_InstallerFolder/samples/sampleDocs/guidelines*

**i Note:** The unsolicited 277 transaction, 277 claim acknowledgement, and 824 application advice are not mandated by HIPAA. Customers should verify that their trading partners support the unsolicited 277, 277 claim acknowledgement, or 824 application advice acknowledgement before using them. The same is true of the 275/277 transactions used for HL7 claims attachments.

The EDI data files and XML files required to run the example interfaces are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder/samples/sampleDocs/datafiles*

The data in the sample EDI data files show the use of various elements of the HIPAA transactions. The sample EDI data files do not contain real data.

# HIPAA Transaction Guidelines

All the HIPAA guidelines provided with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream are located as follows:

- *BCCE-<version>\_Home/images/services/cms/bcce-cms/config* and *BCCE-<version>\_Home/images/services/is/bcce-is/config*
- Fsrest mount path
- *bcce-edihipaa-1.0.0\_InstallerFolder/samples/sampleDocs/guidelines*

Example: Version 5010 guidelines are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder/samples/sampleDocs/datafiles/5010\_txns*

The following table lists the HIPAA transactions and their associated guidelines:

## HIPAA Transactions Guidelines

HIPAA Transaction	HIPAA Guideline
00307/003070X070A1/277	PDSA3070277UX070A1.std
00401/004010X092A1/270	PDSA270-B.std (batch)
00401/004010X092A1/270R	PDSA270-RT.std (real-time)
00401/004010X092A1/271	PDSA271.std
00401/004010X093A1/276	PDSA276-B.std (batch)
00401/004010X093A1/276R	PDSA276-RT.std (real-time)
00401/004010X093A1/277	PDSA277.std
00401/004010X094A1/278 (RQ)	PDA278RQ.std
00401/004010X094A1/278 (RSP)	PDA278RP.std
00401/004010X061A1/820	PDSA820.std
00401/004010X095A1/834	PDSA834.std

HIPAA Transaction	HIPAA Guideline
00401/004010X096A1/837 (I)	PDSA837I.std
00401/004010X097A1/837 (D)	PDSA837D.std
00401/004010X098A1/837 (P)	PDSA837P.std
00404/004040X167/277	PDSA4040277UX167.std
00405/004050X150/277	PDSA4050277X150.std
00405/004050X151/275	PDSA4050275X151.std
00405/004050X166/824	PDSA4050824X166.std
00501/005010X279A1/270	PDSA5010270X279-B.std (batch)
00501/005010X279A1/270R	PDSA5010270X279-RT.std (real-time)
00501/005010X279A1/271	PDSA5010271X279.std
00501/005010X212/276	PDSA5010276X212-B.std (batch)
00501/005010X212/276R	PDSA5010276X212-RT.std (real-time)
00501/005010X212/277	PDSA5010277X212.std
00501/005010X217/278 (RQ)	PDSA5010278X217Q.std
00501/005010X217/278 (RSP)	PDSA5010278X217R.std
00501/005010X218/820	PDSA5010820.std
00501/005010X220A1/834	PDSA5010834.std
00501/005010X221A1/835	PDSA5010835.std
00501/005010X222A1/837 (P)	PDSA5010837P.std

HIPAA Transaction	HIPAA Guideline
00501/005010X223A2/837 (I)	PDSA5010837I.std
00501/005010X224A2/837 (D)	PDSA5010837D.std
00501/005010X214/277	PDSA5010277CAX214.std
00501/005010X186A1/824	PDSA5010824X186.std
00501/005010X210/275	PDSA5010275X210.std
00501/005010X213/277	PDSA5010277X213.std

Guidelines that are designated as real-time transactions have limits applied as follows:

270 Transaction - number of patients limited to 1

276 Transaction - number of claims limited to 1

Guidelines that are designated as batch transactions have limits applied as follows:

270 Transaction - number of patients limited to 99

276 Transaction - number of claims limited to 99

## Simplification of HIPAA Guideline Configuration

The HIPAA transactions are standard, therefore the same transaction guidelines are used for all trading partners unless you need to work around a situation in which one of your trading partners cannot yet send or receive HIPAA compliant transactions.

To facilitate the configuration of HIPAA transactions, it is not necessary to upload the .std files for the guidelines listed in [HIPAA Transactions Guidelines](#).

By not uploading the guidelines, the size of your repository is reduced. If you have created transaction bindings for any of your trading partner configurations, the guidelines are not exported with the trading partner configuration unless you have overridden the guideline. Therefore, not uploading the HIPAA transaction guidelines can reduce the size of your trading partner configuration exports.



**i Note:** Whenever a new version of BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream is installed, any changes to the HIPAA transaction guidelines, contained in the new version, takes effect immediately except for those guidelines, which you have uploaded into your repository. Guidelines that are uploaded into your repository must be manually replaced with the new versions of the guidelines.

## HIPAA Transaction Configuration

HIPAA transactions are specialized versions of X12 transactions and are, therefore, configured in the same way. Using the BusinessConnect Container Edition's Operations Editor, you can:

- Add an Interchange Version
- Add a Group Version to an Interchange Version
- Add a Transaction to a Group Version

For more information about configuring the X12 transactions, see Managing X12 Interchanges, Functional Groups, and Transactions, in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

## Configuring Acknowledgements

In addition to 997 Functional Acknowledgements, 999 Implementation Acknowledgements, and TA1 Interchange Acknowledgement Segments, the following business application acknowledgements can be automatically generated for HIPAA transactions received from your trading partners:

- Application advice (824)
- Unsolicited Health Care Claim Status Notification (277U)
- Health Care Claim Acknowledgement (277CA)

The 824, 277U, and 277CA acknowledgements are treated as regular transactions and acknowledgements are returned for them just as they would be returned for a normal HIPAA transaction.

Example: If the system is configured to return 997s and TA1s, then a 997 and TA1 is returned when the 824, 277U or 277CA acknowledgement is received.

The 824, 277U, and 277CA acknowledgements are not supported for use in synchronous request/response HIPAA transactions. For more information on configuring 999 Implementation Acknowledgements, see [Configuring 999 Implementation Acknowledgements](#).

## Configuring 824 Application Advice Acknowledgements

The 824 Application Advice reports the results of an application system's data content edits on a transaction set. The 824 Application Advice can report on validation errors that are beyond the syntax errors that are normally reported by the 997 or it can report the receipt of a transaction that passed validation without any errors. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream supports the following versions of the 824 Application Advice:

- 4050X166 generated for 4010 HIPAA transactions
- 5010X186 generated for 5010 HIPAA transactions

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream can be configured to automatically generate the 824 Application Advice for HIPAA transactions. The 824 Application Advice contains information on the validation results when a transaction is validated against the validation rules contained in the HIPAA Implementation Guides or Type 3 Technical Reports (TR3's). For more information on configuring BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to automatically generate the 824 Application Advice for a trading partner, see [HIPAA Acknowledgement Properties](#).

To use the 824 Application Advice, you must also configure the transaction properties in the Operations Editor. Example interfaces containing the configurations for the supported versions of the 824 are in the directory: *bcce-edhipaa-1.0.0\_InstallerFolder/samples/interfaces*.

The example interfaces are named as follows: `HIPAA-Ack-<interchange version>-824.csx`

To explain how to configure the 824 Application Advice, the example interface `HIPAA-Ack-00405-824.csx` is used. Importing this interface in the Operations Editor results in the following:

- 00405 interchange version
- 004050X166 group version
- 824 transaction set

After this interface is imported and your trading partner is configured for automatic generation of this version of the 824 Application Advice, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream automatically generates this version of the 824 Application Advice whenever a 4010 HIPAA transaction is validated.

You could also manually configure the 824 Application Advice in the Operations Editor just as you would configure any other X12 interchange, group and transaction set. However, for the 824 Application Advice, it is not necessary to upload the guidelines to use for validation. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream knows which guidelines should be used when the interchange, group and transaction are configured as follows:

- 00405 Interchange Version
- 00501 Interchange Version
- 004050X166 Group Version
- 005010X186A1 Group Version
- 824 Transaction Set: leave transaction guideline empty

When configured as above, the following guidelines are used:

- 004050X166\_824 Transaction: PDSA4050824X166.std
- 005010X186A1\_824 Transaction: PDSA5010824X186.std

These guidelines are in the directory: *bcce-edhipaa-1.0.0\_InstallerFolder/samples/sampleDocs/guidelines*

## Configuring 277U Unsolicited Health Care Claim Status Notifications

The 277U unsolicited health care claim status notification reports the results of an application system's data content edits on the claims in a HIPAA version 4010 837 transaction set. The example interface HIPAA-Ack-00307-277.csx contains the configuration for this acknowledgement. This interface is in the directory: *bcce-edhipaa-1.0.0\_InstallerFolder/samples/interfaces*

Importing this interface in the Operations Editor results in the following:

- 00307 interchange version
- 003070X070A1 group version
- 277 transaction set

You could also manually configure the 277U acknowledgement in the Operations Editor just as you would configure any other X12 interchange, group and transaction set. However, for the 277U acknowledgement, it is not necessary to upload the guidelines to use for validation. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream knows which guidelines should be used when the interchange, group and transaction are configured as follows:

- 00307 Interchange Version
- 003070X070A1 Group Version
- 277 Transaction Set: leave transaction guideline empty

When configured as above, the following guideline is used:

- 277 Transaction Set: PDSA3070277UX070A1.std

The guidelines used in the example interfaces are available in multiple locations:

- *BCCE-<version>\_Home/images/services/cms/bcce-cms/config* and *BCCE-1.3.0\_Home/images/services/is/bcce-is/config*
- Fsrest mount path
- *bcce-edhipaa-1.0.0\_InstallerFolder/samples/sampleDocs/guidelines*

## Configuring 277 Claim Acknowledgement

The 277 Claim Acknowledgement has replaced usage of the 277U Unsolicited Health Care Claim Status Notification. The 277 Claim Acknowledgement reports the results of an application system's data content edits on the claims in a HIPAA 837 transaction.

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream supports two versions of the 277 Claim Acknowledgement:

- 5010X214
- 4040X167

Version 5010X214 277 Claim Acknowledgements can be generated for version 5010 HIPAA 837 transactions only.

Version 4040X167 277 Claim Acknowledgements can only be generated for version 4010A1 HIPAA 837 transactions.

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream can be configured to automatically generate 277 Claim Acknowledgements for the claims inside a HIPAA 837 transaction. Generation of both 277 Claim Acknowledgements and 277U Unsolicited Health Care Claim Status Notifications cannot be done.

The 277 Claim Acknowledgement contains information on the validation results when a claim is validated against the validation rules contained in the HIPAA Implementation Guides or Type 3 Technical Reports (TR3's). For more information on configuring BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to automatically generate 277 Claim Acknowledgements for a trading partner, see [HIPAA Acknowledgement Properties](#).

To use the 277 Claim Acknowledgement, you must also configure the transaction properties in the Operations Editor. Example interfaces containing the configurations for the supported versions of the 277 Claim Acknowledgement are in the directory: *bcce-edihipaa-1.0.0\_InstallerFolder/samples/interfaces*.

The example interfaces are named *HIPAA-Ack-interchange version -277.csx*.

## Configuring 999 Implementation Acknowledgements

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream supports the automatic generation of version 005010X231A1 999 Implementation Acknowledgements for HIPAA version 5010 transactions.

For more information about configuring BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to generate version 005010X231A1 999 Implementation Acknowledgements in response to HIPAA 5010 transactions, see [HIPAA Acknowledgement Properties](#).

For more information about Non-HIPAA 999 Implementation Acknowledgements, see the “Configuring Acknowledgements” section in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

# Setting Up Trading Hosts and Partners

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This section describes how to set up trading hosts and partners in BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream. Since HIPAA is a specialized version of X12, the configuration for Trading Hosts uses the X12 protocol.

## Set Up a Host

To configure a trading host for BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, follow the instructions given in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration* guide.

## Set Up a Partner

To configure a trading partner for BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, follow the instructions given in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration* guide.

Configure the partners using the following tabs:

- **General** Same as X12
- **Transmission Structure** Same as X12
  - **Interchange Header**
  - **Group Header**
  - **Control Numbers**
  - **Delimiters**
- **Acknowledgements**
  - **Acknowledgement** Same as X12
  - **HIPAA Acknowledgement** See [HIPAA Acknowledgement Properties](#).

- **Logging** Same as X12
- **Batching** Same as X12
- **Transport** Same as X12

## HIPAA Acknowledgement Properties

### Business Application Acknowledgements

The following is a list of the versions of business application acknowledgements that are supported by BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream:

- 00405/004050X166/824 - generated for 4010 HIPAA transactions
- 00501/005010X186A1/824 - generated for 5010 HIPAA transactions
- 00307/003070X070A1/277 - generated for 4010 HIPAA transactions
- 00404/004040X167/277 - generated for 4010 HIPAA transactions
- 00501/005010X214/277 - generated for 5010 HIPAA transactions

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream can automatically generate the following business application acknowledgements:

- Application advice (824)
- Unsolicited Health Care Claim Status Notification (277U)
- Health Care Claim Acknowledgement (277CA)

The 824 application advice reports the results of an application system's data content edits on a transaction set. The results of editing transaction sets can be reported at the functional group and transaction set level, in either coded or free-form format.

The 824 is designed to report the following for a transaction set:

- Acceptance
- Rejection
- Acceptance with change

The unsolicited health care claim status notification (277U) reports the results of an application system's data content edits on the claims in a transaction set.

The 277 Claim Acknowledgement (277CA) has replaced the usage of the 277U Unsolicited Health Care Claim Status Notification. The 277 Claim Acknowledgement reports the results of an application system's data content edits on the claims in a HIPAA 837 transaction.

Use the HIPAA Acknowledgement tab to specify settings to use in composing these business application acknowledgements for documents sent by this trading partner. These settings take effect only if transaction level acknowledgements have been enabled in the Acknowledgement tab.

The 997 or 999 is generated, when the 824 application advice acknowledgements are also generated, the results contain the X12 and HIPAA syntax validation edits for the transaction.

## 999 Acknowledgements

In accordance with the 5010 transaction TR3s, BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream can be configured to generate version 005010X231A1 999s for all HIPAA 5010 transactions.

Use the HIPAA Acknowledgement tab to enable the option for generating version 005010X231A1 999s. This setting overrides any other 997 or 999 acknowledgement generation settings for 00501 interchanges, which contain HIPAA 5010 transactions.

See the following table for details.

### HIPAA Acknowledgement Fields

Field	Description
824 Application Advice Creation	<p>Defines when 824 acknowledgements are created for this partner by the host. The possible acknowledgement creation options are:</p> <ul style="list-style-type: none"> <li>• <b>None</b> No acknowledgement is created (default).</li> <li>• <b>Always</b> The acknowledgement is created whether there are validation errors to be reported or not. The acknowledgement contains all validation edit info other than that which is related to syntax checking for X12 and HIPAA.</li> <li>• <b>Only on Errors</b> The acknowledgement is created only if there</li> </ul>



Field	Description
	are errors in validation that are not related to X12 syntax or HIPAA syntax.
824 Application Advice Version	<p>Select the version of the 824 Application Advice that should be generated:</p> <ul style="list-style-type: none"> <li>• <b>004050X166</b> This version of 824 application advice is generated only for version 4010 HIPAA transactions (default)</li> <li>• <b>005010X186</b> This version of 824 application advice is generated only for version 5010 HIPAA transactions.</li> <li>• <b>004050X166 &amp; 005010X186</b> Generate 824 application advice for both version 4010 and 5010 HIPAA transactions.</li> </ul>
277 Health Care Notification Creation	<p>Defines when a 277U or 277CA acknowledgement is created for this partner by the host. 277U or 277CA acknowledgements are only created for 837 transactions.</p> <p>The possible acknowledgement creation options are:</p> <ul style="list-style-type: none"> <li>• <b>None</b> No acknowledgement is created (default).</li> <li>• <b>Always</b> The acknowledgement is created whether there are validation errors to be reported or not. The acknowledgement contains all validation edit info including that which is related to syntax checking for X12 and HIPAA.</li> </ul>
277 Health Care Notification Version	<p>Select the version of the 277U or 277CA that should be generated:</p> <ul style="list-style-type: none"> <li>• <b>003070X070A1 - Unsolicited Claim Status.</b> A 277U is generated only for version 4010 HIPAA transactions. (Default)</li> <li>• <b>004040X167 - Claim Acknowledgement.</b> A 277CA is generated only for version 4010 HIPAA transactions.</li> <li>• <b>005010X214 - Claim Acknowledgement.</b> A 277CA is generated only for version 5010 HIPAA transactions.</li> <li>• <b>004040X167 &amp; 005010X214 - Claim Acknowledgement.</b> A 277C is generated for both version 4010 and 5010 HIPAA transactions.</li> <li>• <b>003070X070A1 &amp; 005010X214 - Claim Acknowledgement.</b> A</li> </ul>

Field	Description
	277U is generated for 4010 HIPAA transactions and a 277CA is generated for 5010 HIPAA transactions.
005010X231A1 999 Ack Creation	<p>Enable generation of version 005010X231A1 999 acknowledgements for HIPAA 5010 transactions.</p> <ul style="list-style-type: none"> <li>• <b>Off</b> - 997 and 999 acknowledgement settings from the Acknowledgement tab applied to all transactions.</li> <li>• <b>5010 HIPAA Transactions</b> - Version 005010X231A1 999s is generated for 00501 interchanges, which contain HIPAA 5010 transactions. The 'Inbound Ack Creation Option' setting, from the Acknowledgement tab, is still applied (for example, Interchange, Group, and Txn).</li> </ul>


## Loading HIPAA Guidelines

### Load Guidelines and XSDs

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains a sample configuration file for this tutorial.

To import the configuration file into the BusinessConnect Container Edition's Operations Editor, perform the following steps:

#### Procedure

1. On the **B2B Administration** tile, click **Operations Editor**.
2. Click the **Import** icon .
3. In the **Import Operations** dialog, click **Upload file**.
4. Go to the directory `bcce-edihipaa-1.0.0_InstallerFolder/samples/interfaces` and select the `HIPAA-RT-00401-270-271.csx` file.
5. Click **Open**.

6. Click **Import**.

## Review Guidelines

To review the guideline loaded for the 270 Eligibility, Coverage or Benefit Inquiry transaction, perform the following steps:

### Procedure


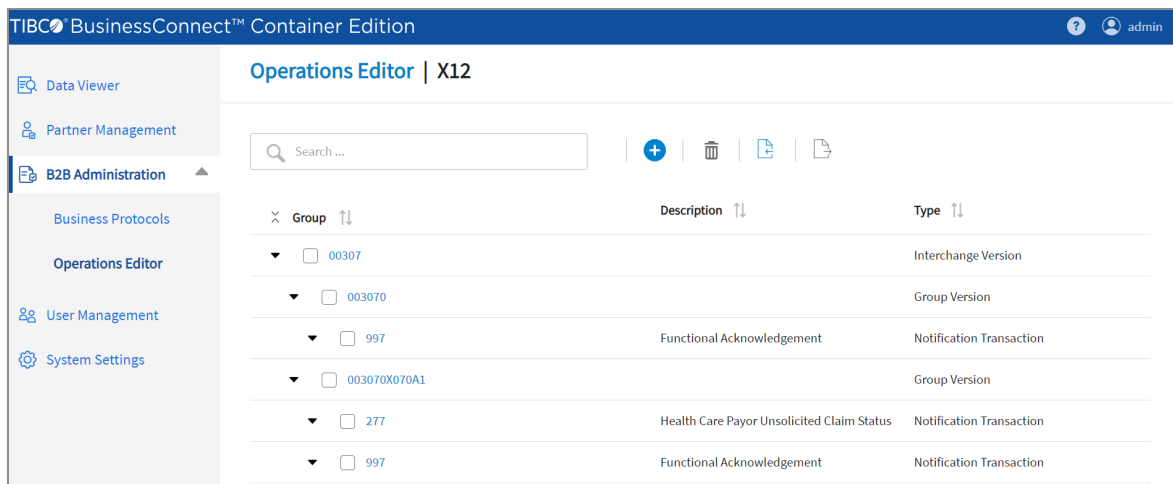
1. On the **B2B Administration** tile, click **Operations Editor**.
2. Click the **X12** protocol.
3. Click the  icon to display all X12 operations.

Figure 7: Edit Operations



4. Click the **270** link.
5. Click the **Guideline** tab.
6. Notice that there is not a guideline specified for the Request, the Acceptance Response, or the Rejection Ack. Only the **GS01 Functional Identifier Code** has to be specified for each of these items.

Guideline files do not have to be specified for HIPAA transactions because BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream has default guidelines that provide HIPAA-compliant validation. For HIPAA transactions, it uses the default guideline if the **Transaction Guideline** field is left

empty and the interchange and group are properly named.

7. Click **Save**.

# HIPAA Transactions Tutorial

---

This section gives an overview of how to use BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to exchange real-time transactions.

In this tutorial, you configure trading partner information, configure a private process to communicate with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, and run the tutorial.

## Overview

In this tutorial, you use TIBCO ActiveMatrix BusinessWorks™ and BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream running on the host machine to send a HIPAA 270 Eligibility, Coverage or Benefit Inquiry transaction to the trading partner machine running BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.

A simple private process on the receiving machine is configured to send the HIPAA 271 Eligibility, Coverage or Benefit Information transaction through BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream in response to the 270 transaction. The transaction set identifier information is as follows:

- The initiator machine:
  - Transaction set - 270
  - Group version - 4010X092A1
  - Interchange version - 00401
- The responder machine:
  - Transaction set - 271
  - Group version - 4010X092A1
  - Interchange version - 00401

As you run the tutorial, the TIBCO software applications perform the following tasks on the host machine:

1. TIBCO Business Studio reads the XML file that contains the data for the 270 transaction.
2. TIBCO Business Studio parses the XML data and sends the XML data to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
3. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream converts the XML data to X12 data.
4. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 270 guideline.
5. The validated X12 data is bundled into an interchange for sending to the trading partner.
6. The software uses HTTP transport to send the interchange to the trading partner.

The TIBCO software applications perform the following tasks on the trading partner machine:

1. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream receives the X12 interchange.
2. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 270 transaction guideline.
3. The software converts validated 270 X12 data to XML data.
4. The software sends the converted 270 XML data to the private process.
5. The private process returns statically configured 271 XML data to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
6. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream takes the 271 XML data that it receives from the private process and converts the XML data to X12 data.
7. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 271 guideline.
8. The software bundles the validated 271 data into an interchange.
9. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream takes the interchange containing the 271 data and returns it as part of the 200 OK HTTP response to the original HTTP request.

The following steps occur on the host machine:

- BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 271 transaction guideline.
- The software converts the validated 271 X12 data to XML data.
- The software sends the converted 271 XML data to the private process.
- The private process logs data from the 271 response.

The following sections describe how to set up and run the tutorial. The steps required in setting up BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to run the tutorial are the same steps that are discussed in the “Managing EDI Guidelines” and “Exchanging Documents” topics in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® User Guide*.

## Tutorial Prerequisites

Before starting the tutorial, ensure that the following TIBCO software packages are installed on the host and trading partner machines:

1. TIBCO BusinessConnect™ Container Edition

For more information on setting up and running TIBCO BusinessConnect™ Container Edition, see the *TIBCO BusinessConnect™ Container Edition Administration* and *TIBCO BusinessConnect™ Container Edition Trading Partner Management* guides.

2. TIBCO ActiveMatrix BusinessWorks™.

3. TIBCO ActiveMatrix BusinessWorks™ Plug-in for BusinessConnect™

4. TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream®

If you are not familiar with the X12 standard, see the "X12 Overview" topic in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

Review the "Managing EDI Guidelines" and "Exchanging Documents" topics in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® User Guide*.

5. TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream®

If you are not familiar with HIPAA, see [Introduction to HIPAA Protocol](#).

**i Note:** For the exact versions of these software packages, see the *Readme* file.

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains all the guidelines needed for this tutorial. Therefore it is not required to use EDISIM to create and customize any guidelines for the tutorial.

## Configuring the Trading Host Machine

### Load Guidelines and XSDs

The first step in configuring the trading host machine is to load the guidelines and XSDs. For this tutorial, the procedure for loading the guidelines and XSDs is the same on both the Trading Host machine and the Trading Partner machine. Use the example interface HIPAA-RT-00401-270-271.csx on both the Trading Host machine and the Trading Partner machine.

Perform the steps provided in [Review Guidelines](#) and [Load Guidelines and XSDs](#).

### Create the Trading Host on the Host Machine

To create the trading host and set it as the default host, perform the following steps:

#### Procedure

1. On the **Partner Management** tile, click **Hosts**.
2. On the Hosts page, click **Create Host**, which is on the top-right corner of the page.
3. In the **Host Name** field, enter *Company1*.
4. Click **Proceed**.
5. Select the **Make this as Default Host** checkbox.
6. Click **Done**.



## Configure the Host Protocol on the Host Machine

For this tutorial, disable all protocols except for the X12 protocol. The interchange qualifier and ID are then configured for the X12 protocol.

### Enable the X12 Protocol

#### Procedure

1. Go to **Partner Management > Hosts > Company1**.
2. On the **Protocols** tab, disable all the protocols except X12 by clearing the checkboxes of other available protocols.

### Set the Interchange Qualifier and ID

#### Procedure

1. Go to **Partner Management > Hosts > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Click the **Add** icon next to the **Default Interchange Qualifier ID** field.
4. In the **Add New** dialog, select **01** from the **Domain Type** list.
5. In the **ID** field, enter *123456789*.
6. Click **Add**.
7. In the **Default Interchange Qualifier ID** field, select **01-123456789**.
8. Click **Save**.

## Create the Trading Partner on the Host Machine

To create the trading partner and enable the X12 protocol, perform the following steps:

#### Procedure

1. On the **Partner Management** tile, click **Partners**.
2. On the Partners page, click **Create Partner**, which is on the top-right corner of the

page.

3. In the **Partner Name** field, enter *Company2*.
4. Click **Proceed**.
5. On the **Protocols** tab, select the **X12** checkbox.
6. Click **Done**.

## Set the Interchange Qualifier and ID

### Procedure

1. Go to **Partner Management > Partners > Company2**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Click the **Add** icon next to the **Default Interchange Qualifier ID** field.
4. In the **Add New** dialog, select **01** from the **Domain Type** list.
5. In the **ID** field, enter *987654321*.
6. Click **Add**.
7. In the **Default Interchange Qualifier ID** field, select **01-987654321**.
8. Click **Save**.

## Enable Outbound EDI Validation

To enable outbound EDI validation, perform the following steps:

### Procedure

1. Go to **Partner Management > Partners > Company2**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. On the **General** tab in the **Outbound** section, select the **Enable EDI Validation** checkbox.

## Set the Transport

To set the transport, perform the following steps:

## Procedure

1. Go to **Partner Management > Partners > Company2**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Go to the **Transport** tab.
4. Click **Add Outbound Transport**.
5. In the **Add Transport** dialog, enter *HTTP* in the **Transport Name** field.
6. From the **Transport Type** dropdown list, select **HTTP**.
7. Click **Add**.
8. In the **URL** field, enter the name of the trading partner's machine. Example:  
machine1.acme.com:8800/X12.
9. Click **Save**.

# Configure the Business Agreement on the Host Machine

## Procedure

1. On the **Partner Management** tile, click **Business Agreements**.
2. On the Business Agreements page, click **Create Agreement**, which is on the top-right corner of the page.
3. Select **Company1** in the **Host** field and **Company2** in the **Partner** field.
4. Click **Proceed**.
5. On the **Bind Protocol** tab, select the **X12** checkbox.
6. Click **Edit Configurations** next to the **X12** checkbox.
7. Go to the **Transports** tab and verify that **HTTP** is selected in the **Primary Transport** dropdown list in the Outbound transport for Host "Company1" area.
8. Click **Save**.

# Configure Private Processes on the Host Machine

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains an example TIBCO ActiveMatrix BusinessWorks™ project that sends a HIPAA 270 transaction to BusinessConnect Container Edition.

This section contains the following parts:

- [Processes Overview](#)
- [Configuring Private Process in TIBCO Business Studio](#)

## Processes Overview

The example HIPAA\_RTPatientEligibility project contains the following processes:

- **Send 270 RT Request:** Reads a file containing the XML data equivalent to the 270 transaction and sends the XML data to BusinessConnect Container Edition.
- **Validation Error Advisory Received:** Activated when BusinessConnect Container Edition sends out an advisory indicating that there is a validation error on the original 270 Transaction.

## Configuring Private Process in TIBCO Business Studio

To configure the private process in TIBCO Business Studio:

- [Opening the TIBCO ActiveMatrix BusinessWorks Project](#)
- [Configuring Connections to BusinessConnect Container Edition](#)

## Opening the TIBCO ActiveMatrix BusinessWorks Project

To open the TIBCO ActiveMatrix BusinessWorks project in TIBCO Business Studio, perform the following steps:

### Procedure

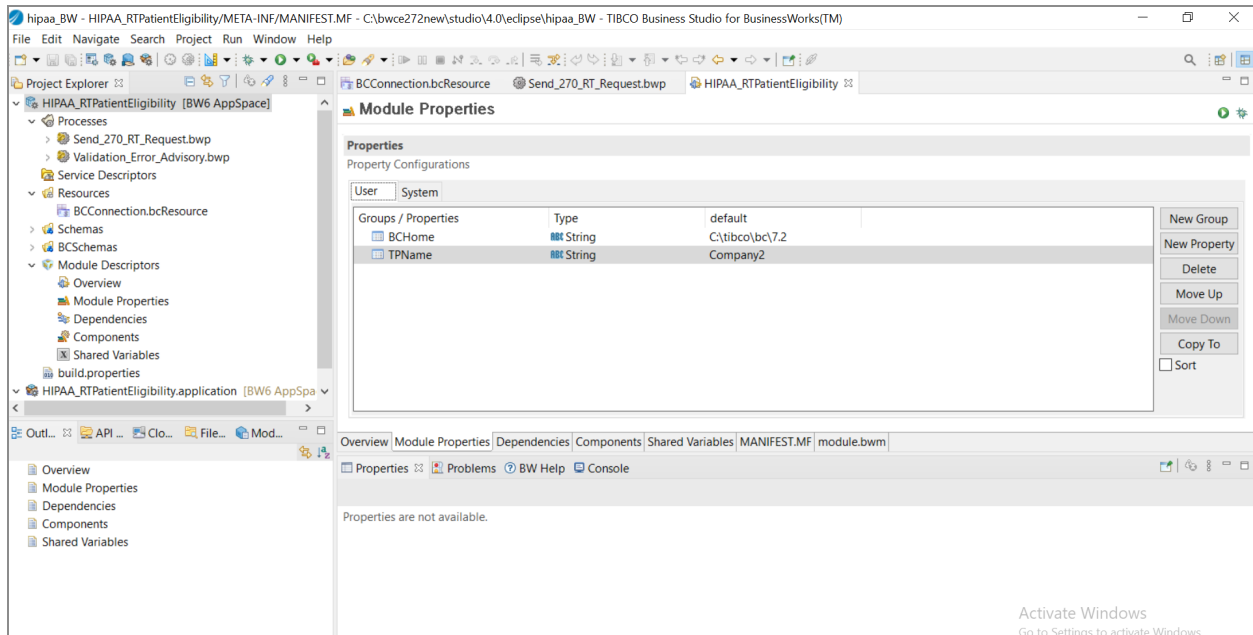
1. Start TIBCO Business Studio.
2. Go to **File > Import**.
3. On the **Import** page, expand the **General** folder and select the **Existing Studio**

**Projects into Workspace** item. Click **Next**.

4. Click **Browse** next to the **Select archive file** field.
5. Go to the `/bcce-edhipaa-1.0.0/samples/bw/HIPAA_RTPatientEligibility` directory and select the `HIPAA_RTPatientEligibility_for_bw6.zip` file.
6. Click **Finish**.

After importing the sample, perform the following steps:

1. Expand **Module Descriptors** in the Project Explorer view.
2. Double-click **Module Properties**.
3. On the **User** tab, change the default values of the **BCHome** and **TPName** properties according to your environment.



## Configuring Connections to BusinessConnect Container Edition

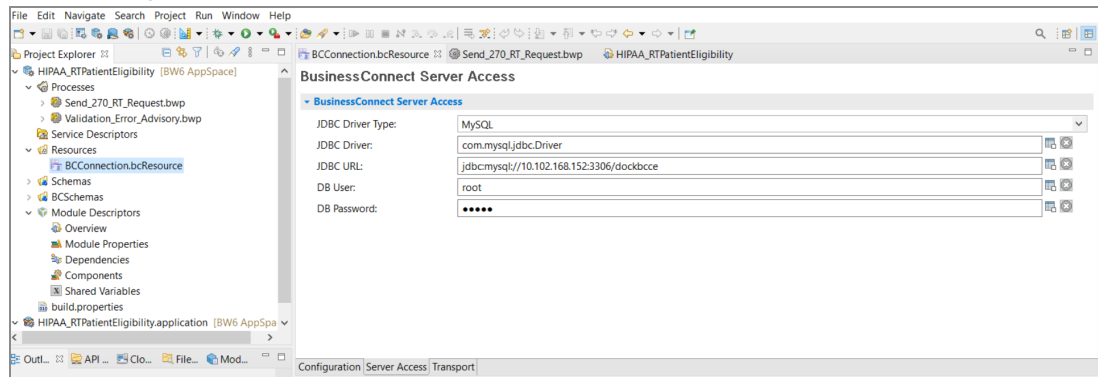
To configure connections to BusinessConnect Container Edition on the Initiator computer, perform the following steps:

### Procedure

1. In the Project Explorer view, expand **Resources** and double-click

**BCConnection.bcResource.**

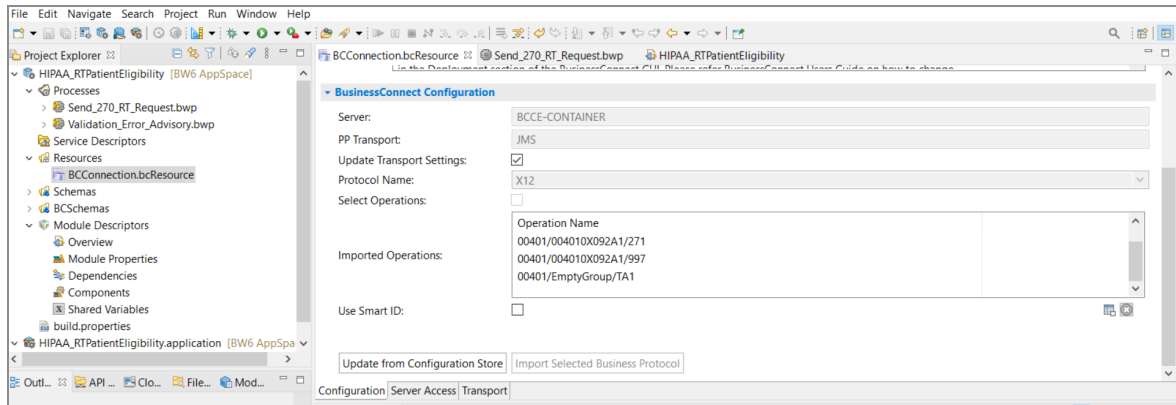
2. Configure the server information on the **Server Access** tab.
  - a. From the **JDBC Driver** dropdown list, select the JDBC driver that you use to communicate with the BusinessConnect Container Edition configuration store.
  - b. In the **JDBC URL** field, enter the URL for the configuration store.
  - c. In the **DB User** and **Password** fields, enter the configuration store username and password.
  - d. Click **Apply** and **Save**.



3. On the **Configuration** tab, click **Update from Configuration Store**.
4. From the **Protocol Name** dropdown list, select **X12**.
 

If you select the **Select Operations** checkbox, you can select any of the configured or imported operations. For this tutorial, select all operations and click **OK**.
5. Click **Import Selected Business Protocol**.
 

When you import the protocol, BusinessWorks retrieves information from the BusinessConnect Container Edition configuration store and puts them in the project folder.
6. Click **Save**.



## Configuring the Trading Partner Machine

The following sections describe how to configure BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream on the trading partner machine for running this tutorial.

### Load Guidelines and XSDs

The first step in configuring the trading partner machine is to load the guidelines and XSDs. For this tutorial, the procedure for loading the guidelines and XSDs is the same on both the Trading Host machine and the Trading Partner machine. Use the example interface HIPAA-RT-00401-270-271.csx on both the Trading Host machine and the Trading Partner machine.

Perform the steps provided in [Review Guidelines](#) and [Load Guidelines and XSDs](#).

## Configure the Trading Host on the Trading Partner Machine

To configure the trading host on the trading partner machine, create the trading host and configure the protocol for the trading host.

## Create the Trading Host on the Partner Machine

To create the trading host and set it as the default host, perform the following steps:

### Procedure

1. On the **Partner Management** tile, click **Hosts**.
2. On the Hosts page, click **Create Host**, which is on the top-right corner of the page.
3. In the **Host Name** field, enter *Company2*.
4. Click **Proceed**.
5. Select the **Make this as Default Host** checkbox.
6. Click **Done**.

## Configure the Host Protocol on the Partner Machine

For this tutorial, disable all protocols except for the X12 protocol. The interchange qualifier and ID are then configured for the X12 protocol.

## Enabling The X12 Protocol

### Procedure

1. Go to **Partner Management > Hosts > Company2**.
2. On the **Protocols** tab, disable all the protocols except X12 by clearing the checkboxes of other available protocols.

## Setting The Interchange Qualifier and ID

### Procedure

1. Go to **Partner Management > Hosts > Company2**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Click the **Add** icon next to the **Default Interchange Qualifier ID** field.
4. In the **Add New** dialog, select **01** from the **Domain Type** list.
5. In the **ID** field, enter *987654321*.



6. Click **Add**.
7. In the **Default Interchange Qualifier ID** field, select **01-987654321**.
8. Click **Save**.

## Configure the Trading Partner on the Trading Partner Machine

To configure the trading partner on the trading partner machine, you need to create the trading partner and configure the protocol for the trading partner.

### Create the Trading Partner on the Partner Machine

To create the trading partner and enable the X12 protocol, perform the following steps:

#### Procedure

1. On the **Partner Management** tile, click **Partners**.
2. On the Partners page, click **Create Partner**.
3. In the **Partner Name** field, enter *Company1*.
4. Click **Proceed**.
5. On the **Protocols** tab, select the **X12** checkbox.
6. Click **Done**.

### Set the Interchange Qualifier and ID

#### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Click the **Add** icon next to the **Default Interchange Qualifier ID** field.
4. In the **Add New** dialog, select **01** from the **Domain Type** list.
5. In the **ID** field, enter *123456789*.

6. Click **Add**.
7. In the **Default Interchange Qualifier ID** field, select **01-123456789**.
8. Click **Save**.

## Enable Outbound EDI Validation

To enable outbound EDI validation, perform the following steps:

### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. On the **General** tab in the **Outbound** section, select the **Enable EDI Validation** checkbox.

## Set the Transport

To set the transport, perform the following steps:

### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Go to the **Transport** tab.
4. Click **Add Outbound Transport**.
5. In the **Add Transport** dialog, enter *HTTP* in the **Transport Name** field.
6. Select **HTTP** from the **Transport Type** dropdown list.
7. Click **Add**.
8. In the **URL** field, enter the name of the trading partner's machine. Example:  
machine2.vidgets.com:8800/X12.
9. Click **Save**.

## Configure the Business Agreement on the Trading Partner Machine

### Procedure

1. On the **Partner Management** tile, click **Business Agreements**.
2. On the Business Agreements page, click **Create Agreement**, which is on the top-right corner of the page.
3. Select **Company2** in the **Host** field and **Company1** in the **Partner** field.
4. Click **Proceed**.
5. On the **Bind Protocol** tab, select the **X12** checkbox.
6. Click **Edit Configurations** next to the **X12** checkbox.
7. Go to the **Transports** tab and verify that **HTTP** is selected in the **Primary Transport** dropdown list in the Outbound transport for Host “Company2” area.
8. Click **Save**.

## Configure the Private Process on the Trading Partner Machine

TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® installation package contains a simple program to send response XML to BusinessConnect Container Edition. Use this simple program as the private process on the trading partner machine and configure it to send the 271 response transaction.

## Running the Tutorial

To run the tutorial, perform the following steps on the trading partner machine:

### Procedure

1. Create a deployment configuration, deploy, and start TIBCO BusinessConnect™

Container Edition.

During the deployment process, the default behavior is to start the deployed service. For more information on deployment, see the *TIBCO BusinessConnect™ Container Edition Installation and Deployment* guide.

2. Open the HIPAA\_RTPatientEligibility project and configure the "Receive 270 Sync Request" process in TIBCO ActiveMatrix BusinessWorks™ 6.x.



**Note:** HIPAA\_RTPatientEligibility\_for\_bw6.zip file is in the bcce-edhipaa-1.0.0/samples/bw/HIPAA\_RTPatientEligibility directory.

On the host machine, perform the following steps:

### Procedure

1. Create a deployment configuration, deploy, and start TIBCO BusinessConnect™ Container Edition.
2. Send the HIPAA 270 transaction from TIBCO Business Studio. See [Send the HIPAA 270 Transaction](#).
3. Verify the results of sending the message. See [Expected Results](#) and [Viewing Logs](#).

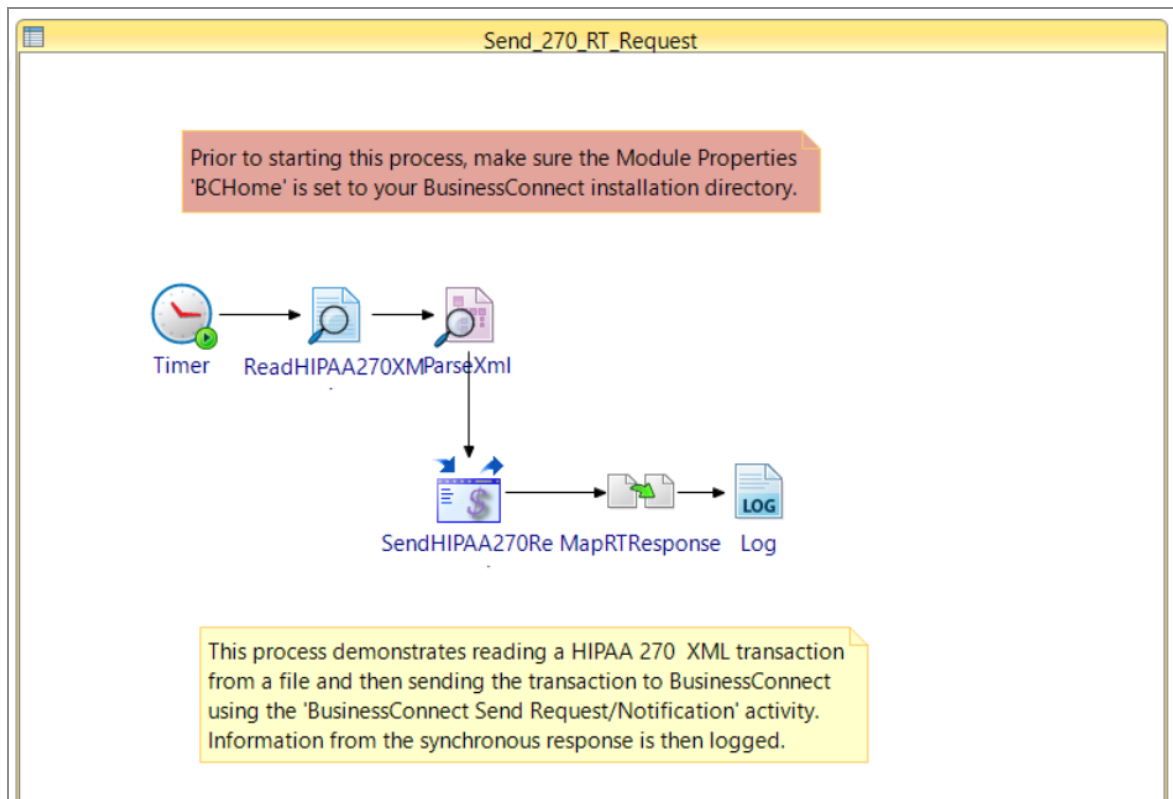
## Send the HIPAA 270 Transaction

The Send 270 RT Request process, performs the following tasks:

### Procedure

1. Reads a file containing XML data for a HIPAA 270 transaction.
2. Parses the 270 XML data.
3. Constructs a request message containing the 270 XML data and sends it to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
4. Waits for a response to the request.
5. Logs information from the response.

*Figure 8: Send 270 RT Request Process*



## Run the Tutorial on the Host Machine

To run the tutorial on the host machine, perform the following steps:

1. In the opened TIBCO Business Studio project, expand the **HIPAA\_RTPatientEligibility** folder in the **Project Explorer** tab, and click the **Send\_270\_RT\_Request** process.
2. Click the **SendRequest** activity, and then click the Input tab to verify the name of the trading partner.
3. On the **Tester** tab, click the dropdown icon next to the **BWApplication** icon.
4. Select **Run Configuration** from the dropdown list.
5. In the **Run Configurations** dialog, expand **BusinessWorks Application > BWApplication**.
6. From the list of the processes displayed, you can select one or multiple items based on the type of transaction you want to process. In this tutorial, click the **Send\_270\_RT\_Request** message.
7. Click **Apply > Run**.

You can see BusinessWorks logs on the **Console** tab.

**i Note:** If you want to run the process in debug mode, click the **Debug BWApplication** icon > **Debug Configurations** and follow the above procedure from Step 5.

## Expected Results

After the 270 transaction is received by the host BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, the following events occur:

1. The host BusinessConnect Container Edition converts the XML data to X12 data.
2. The host validates the X12 data against the 270 guideline.
3. The validated X12 data is bundled into an interchange for sending the data to trading partner.
4. The X12 interchange is sent to the trading partner using HTTP.
5. The trading partner BusinessConnect Container Edition receives the X12 data.
6. The trading partner validates the X12 data against the 270 guideline.
7. The trading partner converts the X12 data to XML data.
8. The trading partner sends the XML data to its private process.
9. The trading partner's private process sends 271 XML data as a response to the trading partner's BusinessConnect Container Edition.
10. The trading partner converts the XML data to X12 data.
11. The trading partner validates the X12 data against the 271 guideline.
12. The validated X12 response is bundled into an interchange for sending to the host.
13. The X12 response interchange is sent to the host as part of the HTTP 200 OK response status.
14. The host validates the X12 response against the 271 guideline.
15. The host converts the X12 response into XML data.
16. The host sends the XML data response to its private process.
17. The host private process logs data from the XML response.

## What you Can Observe

The Send HIPAA 270 Request activity of the Send 270 RT Request process contains the output that indicates the 270 transaction is successfully sent to the trading partner.

- The Map RT Response activity of the Send 270 RT Request process contains the output that indicates the 271 response is successfully received from the trading partner.
- The audit logs on the host and trading partner contain entries for each processing state that occurred in BusinessConnect Container Edition. See [Viewing Logs](#).

# HIPAA Acknowledgements Tutorial

---

This section gives an overview of how to use TIBCO BusinessWorks™ with BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream when HIPAA acknowledgements are received for a transaction. In this tutorial, you learn how to configure the trading partner to respond with the HIPAA acknowledgements and how the private process can be structured to receive them.

## Overview

In this tutorial, you use TIBCO BusinessWorks and BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream running on the host machine to send the HIPAA 837 Professional transaction to the trading partner machine running BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.

The receiving machine is configured to return TA1, 997, 824, and 277U acknowledgements.

The transaction set identifier information is as follows:

- The initiator machine:
  - Transaction set - 837
  - Group version - 4010X098A1
  - Interchange version - 00401
- The responder machine:
  - Transaction set - 824
  - Group version - 4050X166
  - Interchange version - 00405
  - Transaction set - 277
  - Group version - 3070X070A1
  - Interchange version - 00307



As you run the tutorial, the TIBCO software applications perform the following tasks on the host machine:

1. TIBCO Business Studio reads an XML file that contains the data for the 837 Professional transaction.
2. TIBCO Business Studio parses the XML and sends the XML data to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
3. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream converts the XML data to X12 data.
4. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 837 Professional guideline.
5. The validated X12 data are bundled into an interchange for sending to the trading partner.
6. The software uses HTTP transport to send the interchange to the trading partner.

The TIBCO software applications perform the following tasks on the trading partner machine:

1. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream receives the X12 interchange.
2. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates the X12 data against the 837 Professional guideline.
3. The software converts the validated 837 Professional X12 data into XML data.
4. The software sends the converted 837 Professional XML data to the private process.
5. The software generates TA1, 997, 824, and 277U acknowledgements.
6. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream sends each acknowledgement to the host machine.

The following steps occur on the host machine:

1. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream validates each acknowledgement as it is received against the appropriate guideline.
2. The software converts the validated acknowledgement X12 data to XML data.
3. The software sends the converted XML data for each acknowledgement to the private process.

4. The private process receives each acknowledgement and logs the status data from each acknowledgement type.

The following sections describe how to set up and run the tutorial. The steps required in setting up BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream to run the tutorial are:

- Authoring and Configuring EDI Guidelines
- Setting Up Trading Partners
- Creating Private Processes

## Prerequisites

Before starting the tutorial, ensure that the following TIBCO software packages are installed on the host and trading partner machines:

1. TIBCO BusinessConnect™ Container Edition

For more information on setting up and running TIBCO BusinessConnect™ Container Edition, see the *TIBCO BusinessConnect™ Container Edition Administration* and *TIBCO BusinessConnect™ Container Edition Trading Partner Management* guides.

2. TIBCO ActiveMatrix BusinessWorks™ Plug-in for BusinessConnect™

3. TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream®

If you are not familiar with the X12 standard, see the "X12 Overview" topic in *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® X12 Configuration*.

Review the "Managing EDI Guidelines" and "Exchanging Documents" topics in the *TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream® User Guide*.

4. TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream®

If you are not familiar with HIPAA, see [Introduction to HIPAA Protocol](#).

**i Note:** For the exact versions of these software packages, see the Readme file.

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains all the guidelines needed for this tutorial. Therefore it is not required to use EDISIM to create and customize any guidelines for the tutorial.

## Configuring the Trading Host Machine

If you have run [HIPAA Transactions Tutorial](#), you have already configured most of the Host and Partner machines. This tutorial uses a different set of HIPAA guidelines that must be configured in the Operations Editor. Continue setting up the trading host machine by performing the steps in [Load Guidelines and XSDs](#).

If you did not run the previous tutorial, perform the steps described in the following sections:

- [Create the Trading Host on the Host Machine](#)
- [Create the Trading Partner on the Host Machine](#)
- [Configure the Business Agreement on the Host Machine](#)

## Load Guidelines and XSDs

This section describes how to load the guidelines and XSDs for the HIPAA X12 transactions and acknowledgements. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains sample configuration files for this tutorial.

To import the configuration files into the BusinessConnect Container Edition's Operations Editor on the trading host machine, perform the following steps:

### Procedure

1. On the **B2B Administration** tile, click **Operations Editor**.
2. Click the **Import** icon .

3. In the **Import Operations** dialog, click **Upload file**.
4. Go to the directory *bcce-edhipaa-1.0.0\_InstallerFolder/samples/interfaces* and select the *HIPAA-Ack-00307-277.csx* file.
5. Click **Open**.
6. Click **Import**.
7. Repeat this procedure and import the *bcce-edhipaa-1.0.0\_InstallerFolder/samples/interfaces/HIPAA-Ack-00405-824.csx* file.
8. Click **Done**.

## Configure the TIBCO BusinessWorks Private Processes on the Host Machine

BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains an example TIBCO BusinessWorks project that sends a HIPAA 837 Professional transaction to BusinessConnect Container Edition.

This section contains the following parts:

- [Processes Overview](#)
- [Configuring Private Process in TIBCO Business Studio](#)

### Processes Overview

The example HIPAA\_Acks project contains the following processes:

- **Send HIPAA 837 Request** Reads a file containing the XML equivalent of an 837 Professional transaction and sends the XML data to BusinessConnect Container Edition.
- **Receive TA1 Interchange Acknowledgement** Activated when BusinessConnect Container Edition receives a TA1 Interchange Acknowledgement.
- **Receive 997 Functional Acknowledgement** Activated when BusinessConnect Container Edition receives the 997 Functional Acknowledgement.
- **Receive 824 Application Advice** Activated when BusinessConnect Container Edition receives the 824 HIPAA Acknowledgement.

- **Receive 277U Claim Status** Activated when BusinessConnect Container Edition receives the 277U HIPAA Acknowledgement.

## Configuring Private Process in TIBCO Business Studio

To configure the private process in TIBCO Business Studio, perform the following tasks:

- [Opening the TIBCO ActiveMatrix BusinessWorks Project](#)
- [Configuring Connections to BusinessConnect Container Edition](#)

## Opening the TIBCO ActiveMatrix BusinessWorks Project

To open the TIBCO ActiveMatrix BusinessWorks project in TIBCO Business Studio, perform the following steps:

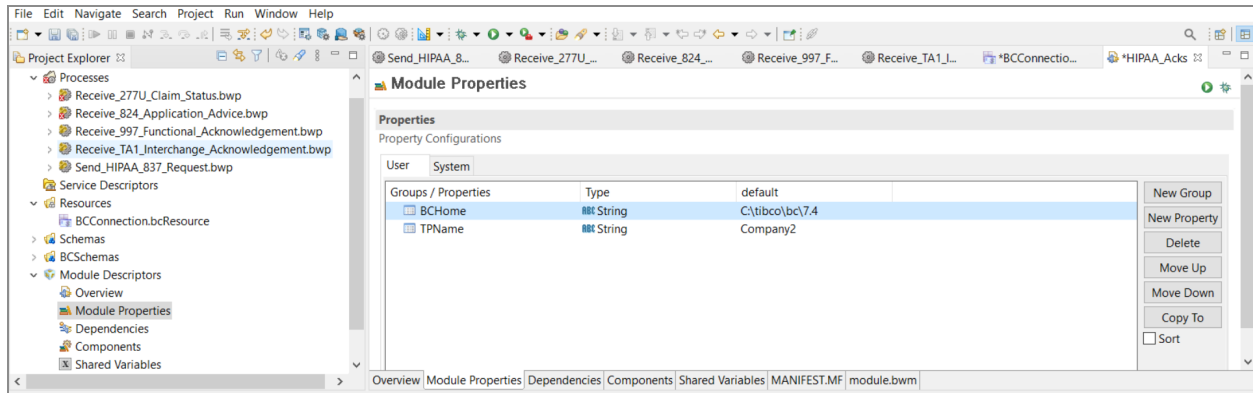
### Procedure

1. Start TIBCO Business Studio.
2. Go to **File > Import**.
3. On the **Import** page, expand the **General** folder and select the **Existing Studio Projects into Workspace** item. Click **Next**.
4. Click **Browse** next to the **Select archive file** field.
5. Go to the *bcce-edhipaa-1.0.0\_InstallerFolder/samples/bw/HIPAA\_Acks* directory.
6. Click **Finish**.

After importing the sample, perform the following steps:

1. Expand **Module Descriptors** in the Project Explorer view.
2. Double-click **Module Properties**.
3. On the **User** tab, change the default values of the **BCHome** and **TPName** properties according to your environment.

Figure 9: BusinessWorks Project



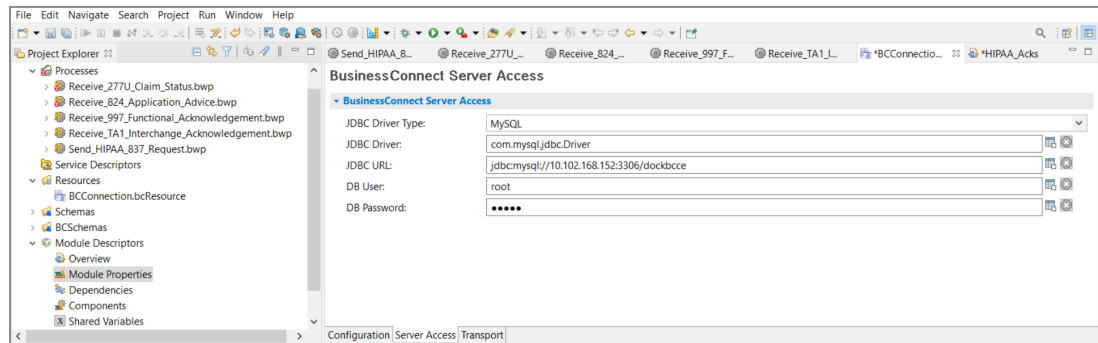
## Configuring Connections to BusinessConnect Container Edition

To configure connections to BusinessConnect Container Edition on the Initiator computer, perform the following steps:

### Procedure

1. In the Project Explorer view, expand **Resources** and double-click **BCConnection.bcResource**.
2. Configure the server information on the **Server Access** tab.
  - a. From the **JDBC Driver** dropdown list, select the JDBC driver that you use to communicate with the BusinessConnect Container Edition configuration store.
  - b. In the **JDBC URL** field, enter the URL for the configuration store.
  - c. In the **DB User** and **Password** fields, enter the configuration store username and password.
  - d. Click **Apply** and **Save**.

Figure 10: BCCE Server Configuration



3. On the **Configuration** tab, click **Update from Configuration Store**.

4. From the **Protocol Name** dropdown list, select **X12**.

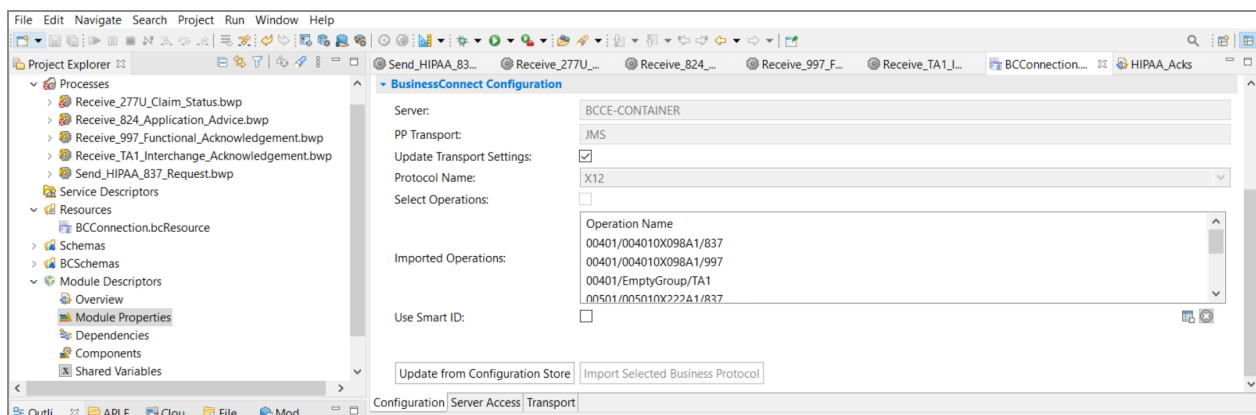
If you select the **Select Operations** checkbox, you can select any of the configured or imported operations. For this tutorial, select all operations and click **OK**.

5. Click **Import Selected Business Protocol**.

When you import the protocol, BusinessWorks retrieves information from the BusinessConnect Container Edition configuration store and puts them in the project folder.

6. Click **Save**.

Figure 11: BCCE Connection Configuration




# Configuring The Trading Partner Machine

## Load Guidelines and XSDs

This section describes how to load the guidelines and XSDs for the HIPAA X12 transactions and acknowledgements. BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream installation package contains sample configuration files for this tutorial.

To import the configuration files into the Operations Editor on the trading partner machine, perform the following steps:

### Procedure

1. On the **B2B Administration** tile, click **Operations Editor**.
2. Click the **Import** icon .
3. In the **Import Operations** dialog, click **Upload file**.
4. Go to `bcce-edihipaa-1.0.0_InstallerFolder/samples/interfaces/HIPAA-Ack-00307-277.csx`
5. Click **Open**.
6. Click **Import**.
7. Repeat this procedure and import the `bcce-edihipaa-1.0.0_InstallerFolder/samples/interfaces/HIPAA-Ack-00405-824.csx` file.
8. Click **Done**.

## Configure the Trading Host on the Trading Partner Machine

If you have run [HIPAA Transactions Tutorial](#), you have already configured the trading host on the Trading Partner machine.

If you did not run the previous tutorial, perform the steps described in the [Configure the Trading Host on the Trading Partner Machine](#) section.



# Configure the Trading Partner on the Trading Partner Machine

If you have already run the [HIPAA Transactions Tutorial](#), you have partially configured the Trading Partner on the Trading Partner machine. In this case, skip to [Configure the HIPAA Acknowledgements](#).

If you did not run the previous tutorial, perform the steps described in the following sections.

## Create the Trading Partner on the Partner Machine

To create the trading partner and enable the X12 protocol, perform the following steps:

### Procedure

1. On the **Partner Management** tile, click **Partners**.
2. On the Partners page, click **Create Partner**, which is on the top-right corner of the page.
3. In the **Partner Name** field, enter *Company1*.
4. Click **Proceed**.
5. On the **Protocols** tab, select the **X12** checkbox.
6. Click **Done**.

## Set the Interchange Qualifier and ID

### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Click the **Add** icon next to the **Default Interchange Qualifier ID** field.
4. In the **Add New** dialog, select **01** from the **Domain Type** list.
5. In the **ID** field, enter *123456789*.
6. Click **Add**.

7. In the **Default Interchange Qualifier ID** field, select **01-123456789**.
8. Click **Save**.

## Enable Outbound EDI Validation

To enable outbound EDI validation, perform the following steps:

### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. On the **General** tab in the **Outbound** section, select the **Enable EDI Validation** checkbox.

## Set the Transport

To set the transport, perform the following steps:

### Procedure

1. Go to **Partner Management > Partners > Company1**.
2. Click **Edit Configurations** next to the **X12** checkbox.
3. Go to the **Transport** tab.
4. Click **Add Outbound Transport**.
5. In the **Add Transport** dialog, enter *HTTP* in the **Transport Name** field.
6. From the **Transport Type** dropdown list, select **HTTP**.
7. Click **Add**.
8. In the **URL** field, enter the name of the trading partner's machine. Example:  
machine2.vidgets.com:8800/X12.
9. Click **Save**.

## Configure the HIPAA Acknowledgements

To enable HIPAA acknowledgements, perform the following steps:

## Procedure

1. On the **Partner Management** tile, click **Partners**.
2. On the Partners page, click **Company1**.
3. On the **Protocols** tab, click **Edit Configurations** next to the **X12** checkbox.
4. Go to the **Acknowledgements** tab > **HIPAA Acknowledgement**.



**Note:** For more information about HIPAA acknowledgements level, see [HIPAA Acknowledgement Properties](#).

5. In the **824 Application Advice Creation** field, select **Always**.
6. In the **824 Application Advice Version** field, select **004050X166**.
7. In the **277 Health Care Notification Creation** field, select **Always**.
8. In the **277 Health Care Notification Version** field, select **003070X070A1 - Unsolicited Claim Status**.
9. Click **Save**.

# Configure the Business Agreement On The Trading Partner Machine

## Procedure

1. On the **Partner Management** tile, click **Business Agreements**.
2. On the Business Agreements page, click **Create Agreement**, which is on the top-right corner of the page.
3. Select **Company2** in the **Host** field and **Company1** in the **Partner** field.
4. Click **Proceed**.
5. On the **Bind Protocol** tab, select the **X12** checkbox.
6. Click **Edit Configurations** next to the **X12** checkbox.
7. Go to the **Transports** tab and verify that **HTTP** is selected in the **Primary Transport** dropdown list in the Outbound transport for Host “Company2” area.

8. Click **Save**.

## Configure the Private Process On The Trading Partner Machine

For this tutorial, it is not necessary to run a private process on the trading partner machine.

# Running the Tutorial

To run the tutorial, perform the following step on the trading partner machine:

### Procedure

1. Create a deployment configuration, deploy, and start TIBCO BusinessConnect™ Container Edition.

During the deployment process, the default behavior is to start the deployed service. For information on deployment, see the *TIBCO BusinessConnect™ Container Edition Installation and Deployment* guide.

On the host machine, perform the following steps:

### Procedure

1. Create a deployment configuration, deploy, and start TIBCO BusinessConnect™ Container Edition.
2. Send the HIPAA 837 Professional transaction from TIBCO Business Studio. See [Send the HIPAA 837 Professional Transaction](#).
3. Verify the results of sending the message. See [Expected Results](#) and [Viewing Logs](#).

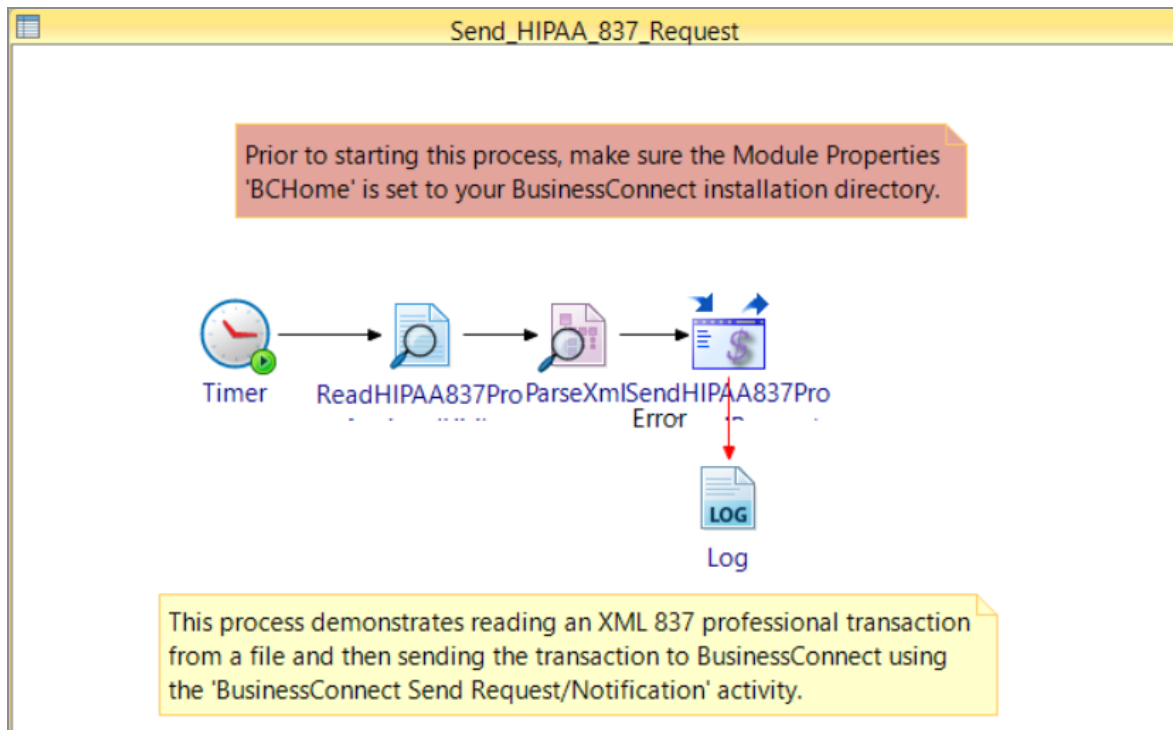
## Send the HIPAA 837 Professional Transaction

The Send HIPAA 837 Request process, performs the following tasks:

1. Reads a file containing XML data for a HIPAA 837 Professional transaction.
2. Parses the 837 Professional XML.

3. Constructs a request message containing the 837 Professional XML data and sends it to BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.
4. Logs information if an error occurs sending the request.

Figure 12: Send HIPAA 837 Request Process



## Run the Tutorial on the Host Machine

To run the tutorial on the host machine, perform the following steps:

1. On the **Tester** tab, click the dropdown icon next to the **BWApplication** icon.
2. Select **Run Configuration** from the dropdown list.
3. In the **Run Configurations** dialog, expand **BusinessWorks Application > BWApplication**.
4. From the list of the processes displayed, you can select one or multiple items based on the type of transaction you want to process. In this tutorial, click the **Send\_837\_Request** message.
5. Click **Apply > Run**.

You can see BusinessWorks logs on the **Console** tab.

**i Note:** If you want to run the process in debug mode, click **Debug BWApplication** icon > **Debug Configurations** and follow the above procedure from Step 3.

## Expected Results

After the 837 transaction is received by the host BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream, the following events occur:

1. The host BusinessConnect Container Edition converts the XML data to X12 data.
2. The host validates the X12 data against the 837 Professional guideline.
3. The validated X12 data is bundled into an interchange for sending the data to trading partner.
4. The X12 interchange is sent to the trading partner BusinessConnect Container Edition using HTTP.
5. The trading partner receives the X12 data.
6. The trading partner validates the X12 data against the 837 Professional guideline.
7. The trading partner converts the X12 data to XML data.
8. The trading partner generates TA1, 997, 824, and 277U X12 acknowledgments.
9. The generated X12 acknowledgments are returned to the host.
10. The trading partner sends the 837 XML data to its private process.
11. The host validates each X12 acknowledgment that it receives against the appropriate guideline.
12. The host converts each X12 acknowledgment into XML data.
13. The host sends the XML data for each acknowledgment to its private process.
14. The host private process logs the status from each XML data acknowledgment.

## What You Can Observe

- The Send HIPAA 837 Professional Request activity of the Send HIPAA 837 Request

process contains the output that indicates the 837 Professional transaction is successfully sent to the trading partner.

- The audit logs in the host and trading partner contain entries for each processing state that occurred in BusinessConnect Container Edition. See [Viewing Logs](#).

# Viewing Logs

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This section explains how to view the transaction logs in Audit Trail of BusinessConnect Container Edition - EDI Protocol HIPAA Edition powered by Instream.

TIBCO® AuditSafe stores information about the messages and documents processed by BusinessConnect Container Edition.

To view the logs on the **Data Viewer** tile, click **Audit Trail > X12**.

All the transactions are displayed on the **Transactions** page.

## Transactions

On the Transactions page, you can perform the following actions:

- **Sort** transactions by columns.
- **Search** for transactions by using Filters
- View **Transaction Details**
- Change the columns that you view by selecting the categories from the **Settings** dialog

The page displays 20 records with the newest transactions listed first by default. Page through the display to see older records. You can sort the transactions by category, or search for records of a specific type. The number of records returned is limited to 10,000 audit events or a maximum of 500 pages. Attempting to select additional pages after 500, will return a "No records found" error.

## Sort Transactions

Sort transactions by clicking the arrows on a column (category) heading.

To reorder the columns, click the category name to select it, and drag it to a different location on the page.

The transactions are sorted by date and time by default, so the newest transactions appear at the top of the list.



## Search for Transactions

The search feature in AuditSafe is powerful and easy to use.

You can search for values within multiple categories. The search finds matching records even if a category (or column) is not displayed. You can hide or show categories by selecting them from the **Settings** dialog.

Use the following options to initiate a search action:

- Use the **Keyword** option to search for a term in all the categories.
- Searching for values or keywords within the same category is an **OR** search.  
For example: Search **Status** for In Progress or Completed to find all transactions that contain those values.
- Searching for values between two or more categories is an **AND** search. You can combine the two search-types to narrow your results.  
For example: Search **Status** for PROCESSING **OR** COMPLETED, **AND** search **Audit Event** for Request Received.

The system automatically segments your query into OR and AND searches as seen in the following example:

### Using Search

Search contains the following options:

- Selecting **Time** allows you to define a Start and End range for your search.
- Selecting **Keyword** searches for the term in all categories.

Search Option	Description
=	<b>Equals:</b> Finds an exact match for a term. Entering the first few letters will list matching options. Select one and press ENTER. If an exact match is not available, no items are listed.
!=	<b>Not Equal to:</b> Use this option to exclude terms from your search.
~	<b>Like:</b> Enter a few letters to list items containing a matching string.

1. Click the **Select** dropdown to choose a category.
2. In the **Search Transactions** field, select a search option (see above), and enter a word.
3. As you begin to enter a word, the system displays the available options.
4. Select an option and press **ENTER** to add it to your query. Continue adding options to narrow your returns.
5. Once you have created your query, click **Find** to list the results.
6. Click the **X** (Delete) icon to remove a search term.

## Customizing Views

The **Settings** icon allows you to select which columns to display.

Click the gear icon to view the list and check the boxes for the columns that you want to view.

Click **Apply** to save your choices.

**Saved Views**  
Default View

**Group By**  
Time

**Columns**

Display for columns  [Restore to default columns](#)

<input checked="" type="checkbox"/> Audit Event	<input checked="" type="checkbox"/> Business Process	<input checked="" type="checkbox"/> Destination	<input checked="" type="checkbox"/> Source
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Time	<input checked="" type="checkbox"/> Transaction ID	
<input type="checkbox"/> Gateway Instance Information	<input type="checkbox"/> Group Control Number	<input type="checkbox"/> Host Initiates	<input type="checkbox"/> Int Control Number
<input type="checkbox"/> Interchange ID	<input type="checkbox"/> Interchange Qlfr	<input type="checkbox"/> Last Operation	<input type="checkbox"/> Location

**Customize Extra Properties Search Criteria** ⓘ

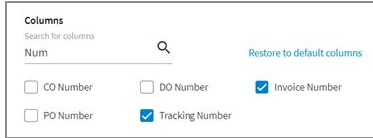
Extra properties  [Select Option:](#) all

<input checked="" type="checkbox"/> Host Initiates	<input checked="" type="checkbox"/> Operation ID	<input checked="" type="checkbox"/> Transaction Type	<input checked="" type="checkbox"/> Txn Control Number
<input checked="" type="checkbox"/> Int Control Number	<input checked="" type="checkbox"/> TransactionID	<input checked="" type="checkbox"/> Type	<input checked="" type="checkbox"/> Protocol Name
<input checked="" type="checkbox"/> Group Control Number	<input checked="" type="checkbox"/> Interchange ID	<input checked="" type="checkbox"/> Gateway Instance Information	<input checked="" type="checkbox"/> Last Operation
<input checked="" type="checkbox"/> Interchange Qlfr	<input checked="" type="checkbox"/> Protocol	<input checked="" type="checkbox"/> Location	

☐ Expand/Collapse for similar Tr...

**Save as** **Apply**

Customize your view using the following options:

Option	Description
Group By	Use this option to group results by category. To do this, select a category from the dropdown.
Columns	<p>Check the box next to the category to display the columns you want to view. You can also enter a partial word to display all the categories containing that string as shown in the following image:</p> 

## Transaction Details

Click a transaction in the list to see more details.

View the transactions using either a Diagram view or a List view.

Switch between the two views by clicking the icon on the top right.

The diagram view also displays related transactions.

# TIBCO Documentation and Support Services

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For information about this product, you can read the documentation, contact TIBCO Support, and join TIBCO Community.

## How to Access TIBCO Documentation

Documentation for TIBCO products is available on the [Product Documentation website](#), mainly in HTML and PDF formats.

The [Product Documentation website](#) is updated frequently and is more current than any other documentation included with the product.

## Product-Specific Documentation

The following documentation for this product is available on the [TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream® Product Documentation](#) page:

- *TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream® Release Notes*
- *TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream® Installation*
- *TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream® Configuration*

## Other TIBCO Product Documentation

When working with TIBCO BusinessConnect™ Container Edition - EDI Protocol HIPAA Edition powered by Instream®, you may find it useful to read the documentation of the following TIBCO products:

- TIBCO ActiveMatrix BusinessWorks™
- TIBCO BusinessConnect™ Container Edition

- TIBCO BusinessConnect™ Container Edition - EDI Protocol powered by Instream®
- TIBCO ActiveMatrix BusinessWorks™ Plug-in for BusinessConnect™
- TIBCO Business Studio™
- TIBCO Foresight® EDISIM
- TIBCO Foresight® HIPAA Validator® Desktop

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