

TIBCO Foresight® Products

Life Cycle of a Guideline

August 2017

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Purpose

This document explains how a HIPAA guideline is created and then used in various TIBCO Foresight products.

Customized vs. Published Guidelines

TIBCO Foresight products ship with published standards such as X12 and EDIFACT, and industry guidelines such as HIPAA and VICS. **ForesightStandardsSummary.pdf** describes which standards and guidelines go with each Foresight product.

With TIBCO Foresight® EDISIM® Standards Editor, you can create your own customized guideline, using a published standard or guideline as a starting point.

Birth of a Customized Guideline

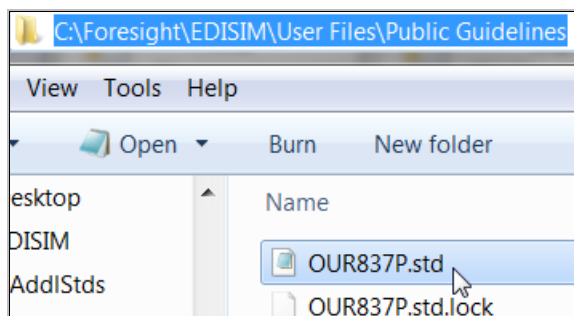
Customized guidelines start life in EDISIM® Standards Editor. Taking a published guideline, you can modify the usage, codes, values, and other characteristics to define exactly how the data should be. **TIB_fsp_edisim_<n.n>_fseditor.pdf** and **BusinessRules.pdf** explain how to do this.

In this document, we base our customized guideline Our837P on 837-X222, a Foresight-supplied 5010 837P with HIPAA types 1 and 2 rules already built in. How did we know which guideline to use as a base? We looked it up in **ForesightHIPAAguidelinelist.pdf**.

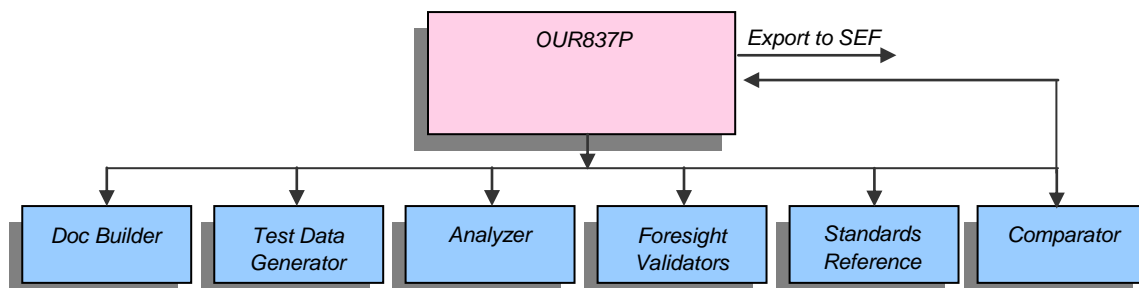
We make changes to codes, values, usage, notes, etc., based on instructions in **TIB_fsp_edisim_<n.n>_fseditor.pdf**. After saving, Our837P will have types 1, 2, and 8 (our specifications are considered type 8).

Using a Customized Guideline with EDISIM

Once defined in Standards Editor, the guideline is actually a .STD file in EDISIM's User Files\Public Guidelines directory:



From there, it is available to all other EDISIM modules:



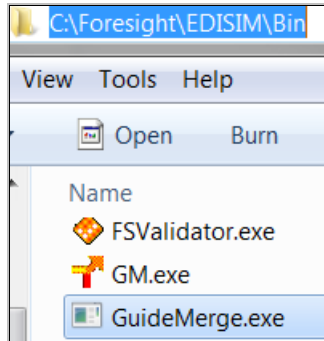
Comparator, when in migration mode, can also modify the guideline or create a new one.

Using a Merged Guideline

Merging Guidelines

Since EDISIM can only handle HIPAA types 1, 2, and 8, we have to merge in types 3-7. These are in special HIPAA guidelines that ship with TIBCO Foresight® HIPAA Validator® Desktop, TIBCO Foresight® Instream®, TIBCO Foresight® Transaction Insight®, TIBCO Foresight® Community Manager®, and other HIPAA-specific products.

We use GuideMerge for this.



GuideMerge ships in the Bin directory of EDISIM and Instream®.

We will merge Our837P with the corresponding types 1-7 guideline, which we look up in **ForesightHIPAAguidelinelist.pdf**. This gives us a guideline with all HIPAA rules plus our own rules from Our837P. We call it P_Our837P:

Our837P + PDSA5010837P = P_Our837P

This follows the custom of putting a P in front of the EDISIM guideline to identify it as the “production” guideline - the one to be used with the HIPAA products.

GuideMerge.pdf gives all the details. Let’s assume that we are doing the merge from a machine that is running Instream. Here’s what we would do:

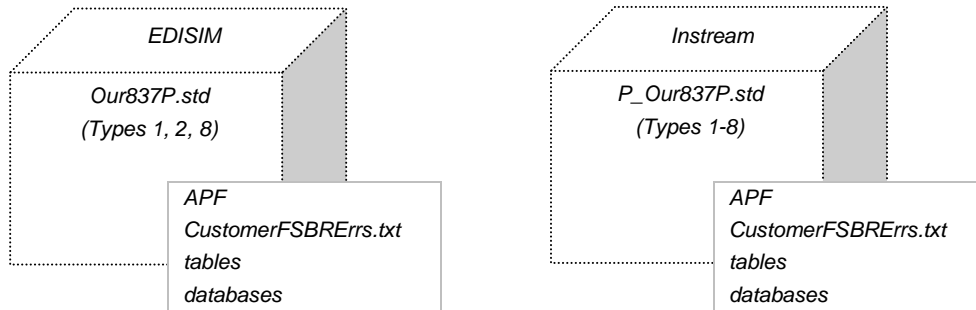
1. Copy Our837P from EDISIM’s User Files\Public Guideline directory to somewhere on the Instream machine.
2. Run GuideMerge to create P_Our837P.std.

Using Merged Guidelines with Instream

Copy the resulting P_Our837P to Instream's Database directory.

If you have made other changes associated with the guideline, such as changes to the validation profile (APF), the customer error message file, external tables or databases, the \$dir.ini, etc., include these in Instream too.

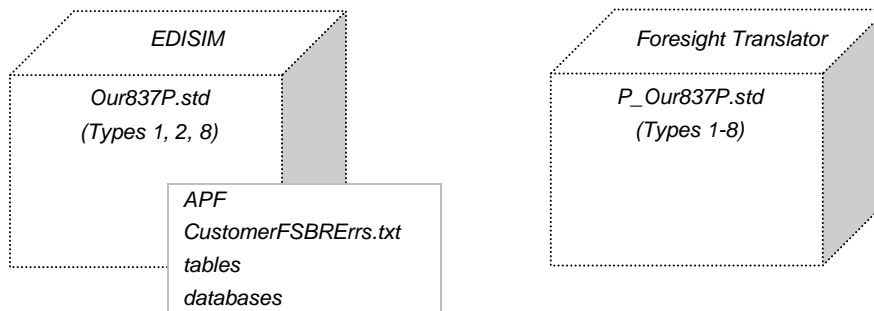
We now have guidelines and associated files in these places:



Using Merged Guidelines with TIBCO Foresight® Translator

Copy the resulting P_Our837P to Foresight® Translator's Database directory.

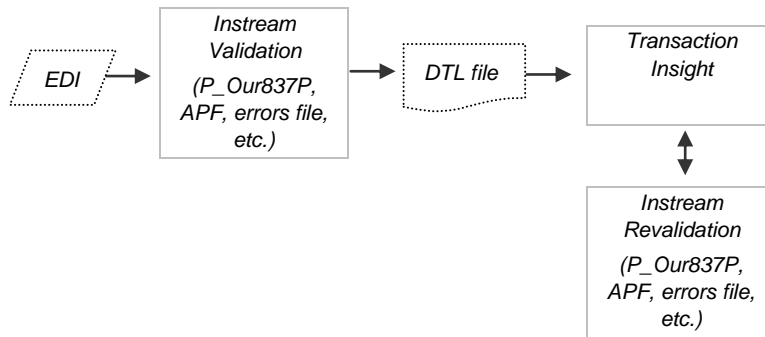
Translator does not need the APF, customer errors file, etc.



Using Merged Guidelines with Transaction Insight®

The web portal machine must have an installation of Instream with the same guidelines and related files that were used for validation.

After initial validation, the detail results file is imported into Transaction Insight. A Transaction Insight user corrects the data and it is sent to Instream to revalidate. Typically, the two instances of Instream are not on the same server.



A more complete overview of a typical process like this might be:

