

X12 Information Forum

June 4, 2008 – New Orleans, LA

**The X12 and WEDI RTA
Work To Date**

Overview of Today's Session

- ◆ Update on the X12 RTA Harmonization Special Appointed Committee
- ◆ Updates from the X12 Subcommittees and Work Groups
- ◆ Update on the WEDI-X12 RTA Initiative
- ◆ Updates from the WEDI-X12 Joint Work Groups
 - Communications
 - HIPAA Exception Requests
 - RTA Glossary
 - RTA Implementation
 - Security & Privacy
 - Transactions Business Process Modeling
- ◆ Questions
- ◆ Next steps
 - Wrap up of discussion
 - Overview of next steps

SAC Representatives

- ◆ Convener
 - Nancy Spector
- ◆ Representatives
 - WG1
 - Annie Brannan
 - Donna Campbell
 - MaryAnne Zingaro
 - WG2
 - Laurie Burckhardt
 - Peter Walker
 - Tim Brown – alternate
 - WG3
 - Pat Wijtyk
 - Kim Peters
 - WG4
 - Annette Gabel
 - WG5
 - Karen Shutt
 - Ken Edick – alternate
 - WG12
 - Nancy Nemes
 - Kepa Zubeldia
 - WG20
 - Craig Nordin
 - C
 - Lisa Miller
 - Kris Olberg
 - N and TG2 Management
 - Don Bechtel
 - Margaret Weiker
 - WEDI Liaison
 - Lisa Miller

SAC Scope of Work

- ◆ Educate, inform, and develop the scope for additional electronic transactions work by the Insurance and Communications Subcommittees related to RTA.
- ◆ Serve as the coordinating committee within X12N and X12C for activities related to RTA.
- ◆ Interact with the joint WEDI-X12 work groups and WEDI as necessary.

◆ Phase I – Analysis Work

– Part 1

- Complete analysis work at January 2008 trimester meeting
 - What data elements are needed to handle real-time processing?
 - Are they present now?
 - Do they need to be added?
 - What happens to the current transaction in 5010?
- Assumption: Finalization of the business models required to complete analysis work
- New Deadline – September 2008 trimester meeting

◆ Phase I – Analysis Work

– Part 2

- Complete compilation work for June 2008 trimester meeting
 - Identify overlapping work, e.g., common data elements
 - Identify resources/expertise needed to complete work
 - Determine next version that changes can be made in
 - Address other needs identified
- New Deadline – January 2009 trimester meeting

◆ Phase II – Complete Work

- Complete the work as identified in Phase I
 - Data maintenance
 - Code maintenance
 - Technical Report 3
 - Other?
 - Waivers
 - White papers/tutorials

SAC Work Since January 2008

- ◆ Reviewed proposed review activity for SAC representatives to review the joint work group products
 - Process finalized in March
- ◆ Added language on voting to Scope of Work document
 - Identified voting representatives for each group
- ◆ Continued to follow Project Proposal for SAC's work
 - Approved by N at January trimester meeting
 - Went to PRB and was changed to a Data Maintenance item
 - Went to TAS in April
 - To be further discussed at June trimester meeting
- ◆ Completed review of draft RTA business process models in April
 - “Agreed with comments”
- ◆ Began planning for June trimester meeting and Info Forum

Updates from the X12N TG2 WGs and C Subcommittee

- ◆ C Subcommittee
- ◆ WG1
- ◆ WG2
- ◆ WG3
- ◆ WG4
- ◆ WG5
- ◆ WG12
- ◆ WG20

- ◆ Reviewed the business process models
- ◆ June X12 trimester work
 - Continuing work on the Acknowledgment Reference Model (ARM)
 - Beginning discussions on new enveloping structures to support RTA
- ◆ Awaiting additional business requirements from the joint WEDI/X12 Communications workgroup

- ◆ Reviewed the draft business model and recommended transactions
 - Made comments that were forwarded to the Transactions Business Process Modeling work group
- ◆ Participating in the SAC's work
- ◆ Looking forward to Phase 2 on pre-service modeling

- ◆ No changes to 837 IGs/TR3s are required to allow their use in real-time claim adjudication
- ◆ Front matter additions being discussed to specifically address real-time use
- ◆ Workgroup is starting to discuss how “payment estimation” for professional and institutional claims could be supported
- ◆ Dental already supports “pre-determination”

- ◆ Current 835 focus:
 - Post adjudication
 - Batch process
- ◆ Need to develop new TR3
 - Identified all data elements needed for new business need
 - Working on development of language to support process
- ◆ Need to coordinate with WG2

- ◆ Need to uniquely identify 835RCA
- ◆ Optional posting from 835RCA
- ◆ Anticipated payment
- ◆ Based on 5010
- ◆ Supports Primary & Secondary Real-time Claims
- ◆ Supports Corrected Payer
- ◆ Does not support crossover claims
- ◆ No PLB

- ◆ Batch 835 required for follow-up and payment
- ◆ There may be multiple 837/835RCA communications
- ◆ If it has to drop out of Real time--a 277 response is returned
- ◆ Separate from 270/271

- ◆ Reviewed the RTA Business Process Model
 - Provided comments to the transactions business process modeling co-chairs
- ◆ Reviewed the 834 standard to determine real time applicability

- ◆ The workgroup reviewed the 5010 277 Claim Acknowledgement (CA) transaction on 6/2.
- ◆ Workgroup concluded that the 277 CA is capable of working in a real time process without any segment changes.
- ◆ The Claim Status Category and Status Codes can be updated as needed to expand current functionality.

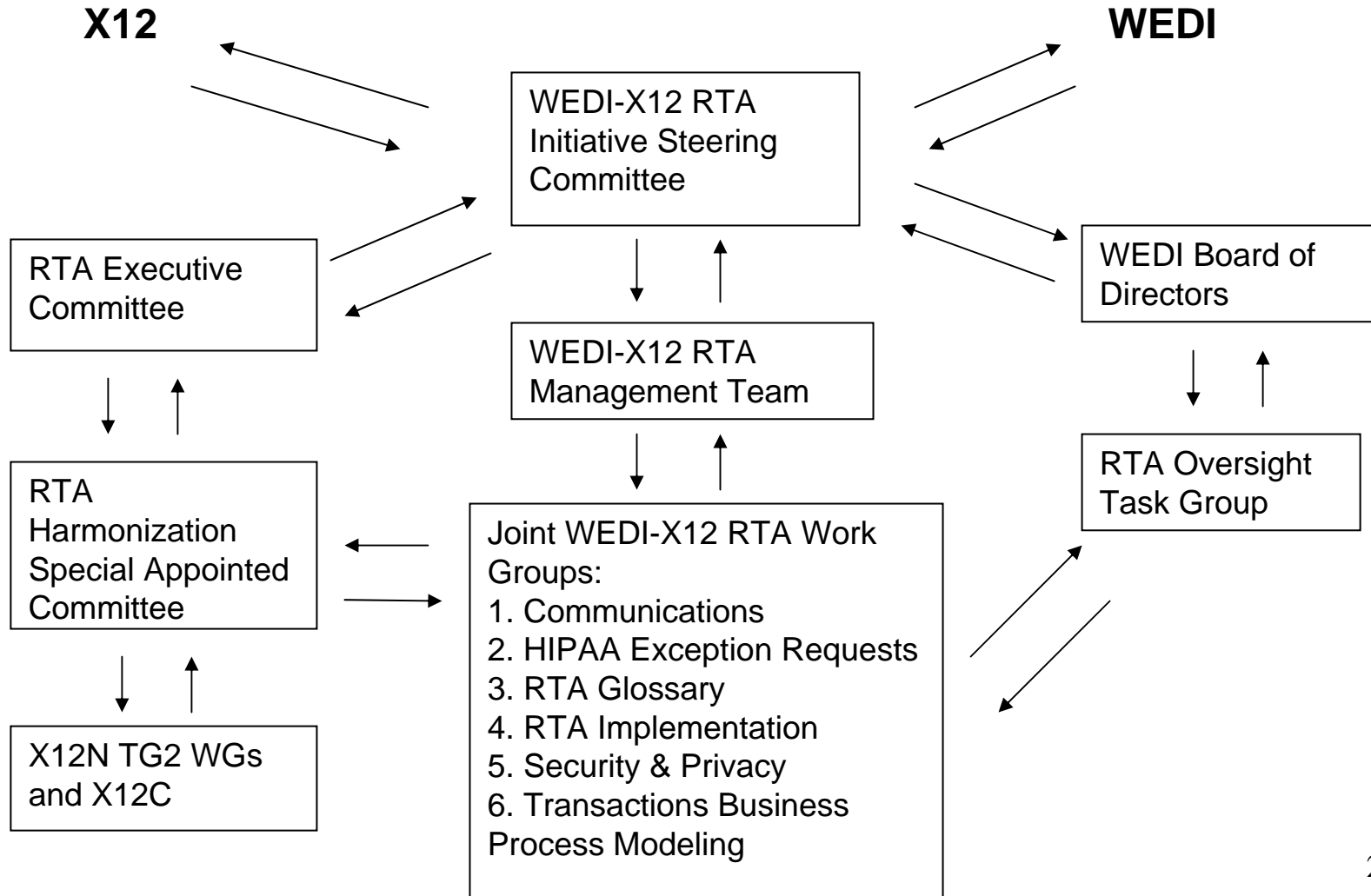
- ◆ Have been participating in the SAC's work
- ◆ Reviewed the draft business model and transaction recommendations

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WEDI-X12 RTA Initiative

- ◆ RTA Initiative Steering Committee
- ◆ RTA Management Team
- ◆ Joint Work Groups

WEDI-X12 RTA Initiative Structure



◆ X12

- Lisa Miller
- Nancy Spector
- Margaret Weiker
- Vacant

◆ WEDI

- Robert Barbour
- Jim Schuping
- Mike Ubl
- Jim Whicker

◆ Scope

- Serve as the coordinating committee for activities related to RTA for the joint WEDI and X12 initiative.
- Provide oversight and guidance to the joint WEDI-X12 work groups identifying and coordinating work related to RTA.

- ◆ Work since January 2008 trimester meeting
 - Discussed proposed review processes by X12 and WEDI for reviewing joint work group products
 - Processes for both organizations were finalized
 - Discussed education plans for 2008
 - Planning to do 3 audiocasts
 - RTA business models
 - Communication protocols
 - Survey results on industry's interest in RTA
 - Considering an in-person conference for early 2009
 - Discussed need for joint disclaimer/copyright language for joint work products
 - Addressed concerns from various joint work groups

◆ Members

- RTA Initiative Steering Committee Members
- Joint Work Group Co-chairs

◆ Scope of Work

- Serve as the coordinating team for the overall activities of the initiative.
- Serve as the team to address and resolve cross-work group topics and issues.

- ◆ Work since January 2008 trimester meeting
 - Discussed proposed review processes by X12 and WEDI for reviewing joint work group products
 - Processes for both organizations were finalized
 - Updated scope of work statements
 - Developed list of expected deliverables for 2008
 - Discussed education planning for 2008
 - Provided updates on work groups

- ◆ Updates from the WEDI-X12 Joint Work Groups
 - Communications
 - HIPAA Exception Requests
 - RTA Glossary
 - RTA Implementation
 - Security & Privacy
 - Transactions Business Process Modeling

- ◆ Co-chairs:
 - Jim Daley (WEDI)
 - Kris Olberg (X12)
- ◆ Scope: Focus on telecommunications requirements to conduct RTA. Goal is to obtain consensus on communications protocols. Collaboration with the Security and Privacy Work Group will be required to work on incorporating security into communications protocols.

- ◆ Activities since January 2008
 - Reviewed scope of work
 - Identified possible topic for 2008 education
- ◆ Projected plans for 2008
 - Identify communication requirements for RTA
 - Make recommendations for communication operating rules
 - Coordinate with Security & Privacy work group as needed
 - Develop and conduct education program/audiocast on communication protocols

- ◆ Co-chairs:
 - Stanley Nachimson (WEDI)
 - Mary Kay McDaniel (X12)
- ◆ Scope: Research if exemptions are needed to conduct modified HIPAA transactions to conduct RTA. Determine process to request a waiver, if necessary, from HHS/CMS. Develop a sample waiver request, if necessary.

- ◆ Activities since January 2008
 - Monitoring the Transactions Business Process Modeling work group's activities
 - Reviewed the draft models and recommended transactions
 - Reviewing questions raised about how HIPAA applies to various electronic transactions
- ◆ Projected plans for 2008
 - Review final business models and recommended transactions
 - Make recommendations on how HIPAA will apply to transactions in RTA
 - Develop an exception request to allow versions other than the 4010/4010A1

- ◆ Co-chairs:
 - Annette Gabel (WEDI)
 - Lisa Miller (X12)
- ◆ Scope: Develop and maintain a common glossary of RTA terms that will serve as a reference for the various work groups and work products as developed, as well as the industry.

- ◆ Activities since January 2008
 - Holding bi-weekly conference calls
 - Reviewing terms for inclusion in glossary
 - Reviewing and drafting definitions
- ◆ Projected plans for 2008
 - Finalize a first draft of the Glossary
 - Anticipate completion by July 2008
 - Participate in educational programs

- ◆ Co-chairs:
 - Robert Barbour (WEDI)
 - Ken Willman (X12)
- ◆ Scope: Promote the value of RTA to providers, clearinghouses, and payers. Ensure appropriate stakeholders contribute to standards development and other processes necessary to drive adoption. Explore funding opportunities for conducting pilot testing of RTA. Set up pilot testing. Document results of pilot projects.

- ◆ Activities since January 2008
 - Awaiting finalization of the business models
 - Robert and Ken having been doing presentations marketing RTA in various venues
- ◆ Projected plans for 2008
 - Continue to market need for RTA
 - Complete an inventory of payer RTA programs

- ◆ Co-chairs:
 - Sue Miller (WEDI)
 - Ginger Wright (X12)
- ◆ Scope: Identify security and privacy elements, including how to authenticate the submitter and how to securely transmit ePHI and other sensitive transaction messages using HTTPS and other security safeguards. Ensure that personal health information transferred between entities remains protected and that all appropriate safeguards are in place.

- ◆ Activities since January 2008
 - Holding monthly work group calls
 - Reviewing existing initiatives related to security and privacy
- ◆ Projected plans for 2008
 - Prepare a white paper outlining the privacy and security areas and issues and the best practices baseline
 - Participate in Communications work group as necessary

- ◆ Co-chairs:
 - Laurie Darst (WEDI)
 - Tom Drinkard (X12)
- ◆ Scope: Focus on real-time processing and developing the outline by phases of the required actors, processes, and functions. The results of the outline (models) will be used to identify existing or new administrative transactions and the necessary data to support the models. The RTA business process models will incorporate and align with the HSA business process models that have been developed by the WEDI HSA Sub-workgroup.

- ◆ Activities since January 2008
 - Received approval of Phase 1 model and recommended transactions
 - Incorporating comments from X12 and WEDI into the final version of the model
- ◆ Projected plans for 2008
 - Finalize Phase 1 model
 - Begin Phase 2 of modeling the pre-service transactions
 - Conduct audiocast on Phase 1 model and recommended transactions

Overall Next Steps

- ◆ X12 WGs to complete analyses of transactions
- ◆ Compile RTA needs identified for the transactions
- ◆ Continue coordinating work within X12 and WEDI-X12 RTA Joint Work Groups

- ◆ 6/08 – 9/08 X12 Meeting: X12 WGs complete transaction analysis work
- ◆ 9/08 – 1/09 X12 Meeting: SAC complete compilation work of WGs' analyses
- ◆ 1/09 – ?: X12 WGs complete transaction work

Questions or Discussion?

Thanks!