TDI | Division of Workers' Compensation

Texas Division of Workers' Compensation (TXDWC)

EDI Claims Release 3.1.4
Trading Partner Profile Registration Instructions

Revised Date: 3/8/2022

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Overview:

This TXDWC Release 3.1.4 EDI Trading Partner Profile Registration requires each trading partner to create and submit a New Profile or an Updated Trading Partner Profile. This form will uniquely identify a trading partner as the sender of the data, how the data will be sent, the business & technical contacts, and the demographics for the Insurers and Claim Administrators.

Upon *completion* of the EDI Trading Partner Profile online, an auto response email will be sent to the primary contact and to the TXDWC. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Please see the email example in the last section of this document, the TXDWC Release 3.1 Trading Partner Profile Registration Email Example section.

Upon *approval* of the EDI Trading Partner Profile by the TXDWC, the EDI Support Team will contact the primary contact to indicate when the profile will become effective for EDI reporting.

The following provides information for accessing and completing a NEW or UPDATED TXDWC Release 3.1.4 EDI Trading Partner Profile.

Accessing and Creating an Account for the Trading Partner Profile:

In order to access and complete a Trading Partner Profile, the Trading Partner will need to sign in to Verisk's Trading Partner Registration system (if previously registered).

If this is the **first time** accessing the TXDWC FROI/SROI Trading Partner Registration system, create an account by clicking on the 'Get Started' button. Once the 'Get Started' button is selected, enter your e-mail address and choose a password for your new account.

After your account has been created, a message will be sent to the specified e-mail address with an activation code to activate your account. Once the activation code is obtained, enter the code in the 'Activation Code' box and click 'Continue'.

Sign In

Username	
Password	

Sign in   Forgot Password?

Create Account

New user? Create an account below to begin using the ISO Trading Partner Registration system.

Get Started

Once signed in the Trading Partner will have the option to create a new profile if it's the first time or update a previously submitted profile. Any previously submitted Trading Partner would be available on the below screen:

Trading Partner Profiles

My Profiles

New Profile

Trading Partner Profiles

Welcome to the Trading Partner Registration system. Get started creating your first profile by clicking the button below.

Create New Profile

The Trading Partner Profile Registration system is made up of the following sections (shown on right) which will be explained in the How to complete a New TXDWC Release 3.1.4 FROI/SROI EDI Trading Partner Profile section below:

Profile Sections

EDI Sender/Receiver

Preparer Contact Info

Primary Contact Info

Secondary Contact Info

Insurers

Claim Administrators

Filing Method

Comments

Submit Profile

How to complete a New TXDWC Release 3.1.4 FROI/SROI EDI Trading Partner Profile:

To create a New Profile, click on the 'Create New Profile' button.

Required fields are indicated throughout the instructions in bold formatting. Upon clicking on the 'Continue' button or 'Next Page' button, any required fields that are not completed will be noted with a red box around the required field.

When filling out the profile, if you see a reference to a DN, e.g., Insurer Name (DN0007), this will indicate that the information requested is a Data Element (DN) that is part of the Claims EDI Release 3.1 report and will be reported to TXDWC in EDI reports.

a. EDI Sender/Receiver:

This section provides identifying information about the Master Trading Partner (Sender) and the Jurisdiction (Receiver).

Note: Sender Master FEIN and Sender Postal Code should be the same as those that the partner will use as the Sender ID (DN0098) in the Header Record of all its EDI transmissions. Once the Company Name is populated and the Company Type is selected, click on 'Next Page'.

1. **Sender Master FEIN**: Enter the Federal Employer Identification Number (FEIN) of your business entity. Please enter 9 digits with no punctuation.
2. **Sender Postal Code:** Enter the Postal Code (Zip+4) of your business entity. Please enter 9 digits with no punctuation. Once Sender Master FEIN and Sender Postal Code fields are populated click on 'Continue'.
3. **Company Name:** Enter the Company Name of the EDI Sender. The Company Name should be the entire name as listed on any licensing/registration applications filed with the TXDWC and not an acronym.
4. **Company Type:** Please indicate the Company Type of the EDI Sender if either Claim Administrator, Insurer or Self-Insured Employer.
5. **Group FEIN:** This will be automatically populated with the Sender Master FEIN entered in the previous screen. Group FEIN will be utilized to allow a sender/company that purchased another company to be able to update the Claim Admin FEIN, etc. on a given claim in the same group even though they will have a different Sender ID (FEIN/PC).
6. Number of Jurisdictions: Please indicate the number of Release 3.1 Jurisdictions that your company currently reports to.

b. Preparer Contact Information:

This section provides identifying information about the person completing the EDI Trading Partner Profile.
1. **Preparer Name:** Enter the contact name of the person completing the EDI Trading Partner Profile.
2. **Preparer Job Title**: Enter the preparer's job title.
3. **Preparer Address, City, State,** and **Zip:** Enter the preparer's address.
4. **Preparer Phone and** Fax: Enter the preparer's phone and fax number.
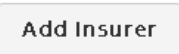5. **Preparer Email:** Enter the preparer's email address.

c. <u>Primary/Secondary Contact for EDI Implementation/Setup:</u>

This section is to identify individuals within your business entity who can be used as the main contacts for this trading partner profile. Two types of contacts should be identified: one for business practices and issues, and one for technical issues. Enter the information below for both a business and technical contact that is the main contact for your company. In the event there is any communication on the EDI reporting, claims, requirements, etc., these contacts will be notified. On the form, click the 'radio button' beside Business or Technical and complete the following information for each specific contact. The first contact entered will be the primary contact.
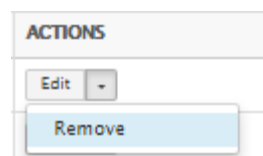
1. **Primary/Secondary Contact Type**: Business or Technical
2. Contact Name: **First**, Middle, **Last,** Suffix
3. Job Title: **Contact's Job Title**
4. **Address Line 1,** Address Line 2, **City, State, Zip**
5. **Phone, Fax**, **Email**
6. **Secondary Contact Type**: Business or Technical
7. Contact Name: **First**, Middle, **Last,** Suffix
8. Job Title: **Contact's Job Title**
9. **Address Line 1,** Address Line 2, **City, State, Zip**
10. **Phone,** Fax**, Email**

d. <u>Insurer (s):</u>

This section of the form identifies the trading partners using this Sender to transmit data electronically to the TXDWC. At least one Insurer is required for a new trading partner profile. If the Sender is also an Insurer, add an Insurer with the Sender's information. If there is more than one Insurer, complete an Insurer section for each one. Provide the full Insurer Name (DN0007), Insurer FEIN (DN0006) and Insurer Type for each Insurer (Insurance Carrier, Certified Self-Insurer, Certified Self- Insurer Group, Self-Insured Governmental Entity) for whose claims the Sender will be transmitting data. TXDWC will notify the Sender of any discrepancy between the identifying information entered and the TXDWC's present records. This list will be used to reconcile identification tables, and it will be used as part of the edit on Insurer FEIN to match the TXDWC's database. Complete an UPDATED TXDWC Release 3.1 EDI Trading Partner Profile to add or remove Insurers.

 : This button is used to allow you to access the entry to add new Insurer on a NEW or UPDATED EDI Trading Partner Profile.

 : This button is used to allow you to remove the last Insurer that was entered during the current EDI Trading Partner Profile submission.

1. To 'Add an Insurer':

- Click on the 'Add Insurer' button
- Enter the applicable Insurer information. Required fields are highlighted in red below; Insurer FEIN, Insurer Name and Insurer Type:

Insurer FEIN	DN0006
	Required field
Insurer Name	DN0007
	Required field
Insurer Type	▾
	Required field

2. To continue 'Adding Insurers':

- Click the 'Add Insurer' button again, otherwise proceed to the Add Claim Administrator(s) section.
- By clicking 'Add Insurer' another Insurer entry will be presented (# 2 in this case). Complete the required information and repeat the process to add the Insurer or Self-Insurer until completed, and then move to the Claim Administrator section.

Insurer(s)

FEIN	INSURER NAME	STATUS	ACTIONS
123456789	Insurer #1		Edit ▾
753159789	Insurer #2		Edit ▾

Add Insurer **Next Page**

3. To remove the last Insurer entered during the entry of the profile:

- Click on the downward arrow alongside the 'Edit' button in the Action column of the Insurer and select 'Remove'.

753159789	Insurer #2	Added	Edit ▾
			Remove

- Once selected, confirm that you wish to delete this entry just added by clicking on the 'Delete Insurer' button: **Delete Insurer** and then the entry that has not been submitted previously, (i.e., was just added when editing), is deleted. Finally click on Submit Profile button to ensure updates done are submitted for state review and approval.
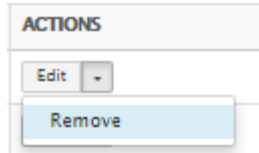
e. Claim Administrator(s):

This information will be used to identify and reconcile Trading Partner relationships. Provide the Claim Administrator's information that will correspond to that of the Claim Administrator

recorded on the claim(s) that will be reported by the Sender (Trading Partner). If the claim administrator is the same entity as the Sender, enter the Sender claim contact information. It is understood that this list will have entries added or removed from time to time for which an updated report should be sent to the TXDWC as outlined within this document.

Add Claim Admin : This button is used to allow you to access the entry to add a new Claim Administrator on a NEW EDI Trading Partner Profile or to add Claim Administrators on an UPDATED EDI Trading Partner Profile.

ACTIONS
Edit ▾
Remove : This button is used to allow you to remove the last Claim Administrator that was entered during the current EDI Trading Partner Profile submission.

1. To 'Add a Claim Administrator':

- Click on the 'Add Claim Admin' button
- Enter the applicable Claim Administrator information. Required fields are highlighted in red below; **Claim Administrator FEIN (DN0187)**, **Claim Administrator Name (DN0188)**, Claim Administrator Information/Attention Line (DN0135), **Office Contact Name**, **Office Contact Phone Number, Office Contact Email**, **Claim Administrator Mailing Address (DN0010)**, Claim Administrator Mailing Secondary Address, **Claim Administrator Mailing City (DN0012)**, **Claim Administrator Mailing State Code (DN0013)**, **Claim Administrator Mailing Postal Code (DN0014)**, **Claim Administrator Physical Address**, Claim Administrator Physical Secondary Address, **Claim Administrator Physical City**, **Claim Administrator Physical State Code**, **Claim Administrator Physical Postal Code (DN0200).**

Claim Administrator

Claim Admin FEIN	DN0187
	Required field
Claim Admin Company Name	DN0188
	Required field
Information/ Attention Line	DN0135
Claim Office Contact Name	
	Required field
Claim Office Contact Phone	
	Required field
Claim Office Contact Email	
	Required field

Claim Admin Mailing Address

Primary Address	DN0010
	Required field
Secondary Address	DN0011
City	DN0012
	Required field
State	
	Required field
Postal Code	DN0014
	Required field

Claim Admin Physical Address

Primary Address	
	Required field
Secondary Address	
City	DN0012
	Required field
State	
	Required field
Postal Code	DN0014
	Required field

Claim Admin Physical Address

Primary Address	
	Required field
Secondary Address	
City	
	Required field
State	
	Required field
Postal Code	DN0200
	Required field

Save Changes   Cancel

2. To continue 'Adding Claim Administrators':

- Click the 'Add Claim Admin' button otherwise proceed to complete the EDI Trading Partner Profile.
- By clicking 'Add Claim Admin' another Claim Admin entry screen will be presented (# 2 in this case). Complete the required information and repeat the process to add the Claim Administrators until completed, and then proceed to complete the EDI Trading Partner Profile.

Claim Administrators

FEIN	CLAIM ADMIN NAME	STATUS	ACTIONS
753159789	Claim Admin #1		Edit ▾
951234567	Claim Admin #2		Edit ▾

Add Claim Admin **Next Page**

3. To remove the last Claim Administrator entered:

- Click on the downward arrow alongside the 'Edit' button in the Action column of the Claim Administrator and select 'Remove'.

951234567	Claim Admin #2	**Added**	Edit ▾
			Remove

- Once selected, confirm you wish to delete this entry just added by clicking on the 'Delete Claim Administrator' button: **Delete Claim Administrator** and then the entry that had not been submitted previously, (i.e., was just added when editing), is deleted. Finally click on Submit Profile button to ensure updates done are submitted for state review and approval.

f. Filing Method:

At least one filing method required.

1. **EDI Vendor:** If you are using an EDI Vendor to submit your EDI reporting, complete this section.
    First click the 'radio button' beside EDI Vendor and select the EDI Vendor that you will be using.

2. **TXDWC Web Entry:** Select TXDWC Web Entry if Sender is a low volume filer and will be entering reports manually via web entry.
3. **Direct SFTP:** Select Direct SFTP if Sender will be exchanging EDI files directly with the TXDWC's vendor using SFTP.

g. Comments:

Please include any comments in this section. Clicking on 'Next Page' will direct you to the 'Submit Profile' section.

h. Submit the TXDWC EDI Trading Partner Profile:

Click the 'Submit Profile' button on the Submit Profile section to complete the registration process. An email confirmation will be generated per the example in the TXDWC Trading Partner Profile Registration Email Example section of this document. TXDWC will respond via email on confirmation and approval of the TXDWC EDI Trading Partner relationship.

Upon the submission of the EDI Trading Partner Profile, an auto response email will be sent to the primary contact, and to the jurisdiction. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Upon approval of the EDI Trading Partner Profile, the EDI Support Team will contact the primary contact to coordinate implementation and scheduling.

NOTE: With few exceptions, upon your request, you are entitled to be informed about the information TDI-DWC collects about you; get and review the information (Government Code, §§552.021 and 552.023); and have TDI-DWC correct information that is incorrect (Government Code, §559.004). For more information, contact agencycounsel@tdi.texas.gov or you may refer to the Corrections Procedure section at www.tdi.texas.gov.
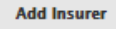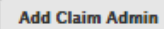
Submit Profile

How to Update an Existing TXDWC Release 3.1 FROI/SROI EDI Trading Partner Profile:
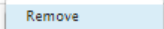
To update a previously submitted Trading Partner Profile, select 'Update' in the actions column of the Trading Partner Profile to be updated:

i. To Update Insurers or Claim Administrators:

There are 3 options for updating Insurers (Insurer Section) and/or Claim Administrators (Claim Administrators Section) within the EDI Trading Partner Profile Update:

- Click the 'Add Insurer' button: [Add Insurer] to add a new Insurer or click on the 'Add Claim Admin' button: [Add Claim Admin] to add a Claim Administrator to your EDI Trading Partner Profile (one that has never been added or was added and removed).

- Click on 'Remove': [Remove] (drop-down of the 'Edit' button) then click on 'Mark Inactive': [Mark Inactive] to set an Insurer or Claim Administrator from your EDI Trading Partner Profile that has been submitted to the TXDWC previously as inactive.

- Click on the 'Edit' button: [Edit] to update the Insurer or Claim Admin entry fields previously submitted to the TXDWC.

- Once all necessary updates are completed, submit the profile by selecting the 'Submit Profile' button: [Submit Profile] in the Submit Profile Section.

j. To Update Additional Sections of the Trading Partner Profile:

To update any of the other sections (EDI Sender, Preparer Contact Info, Primary Contact Info, Secondary Contact Info, and Filing Method) select the corresponding section and update the fields that need to be updated. Then provide a comment of any additional changes made in the Comments section.

- Once all necessary updates are completed, submit the profile by selecting the 'Submit Profile' button: [Submit Profile] in the Submit Profile Section.

k. To Change Sender ID:

There is an option available to update any portion of the Sender ID (Sender FEIN or Sender Postal Code) of a previously submitted Trading Partner Profile.

Click on 'Change Sender ID' (drop-down of the 'Update' button) and you will be redirected to the Sender ID section where you may edit either the Sender FEIN or Sender Postal Code.

This will create a New Trading Partner Profile as it would be considered a New or different Sender.

Note: If all updates made to the existing Trading Partner Profile need to be canceled, in the Submit Profile section, select the 'Cancel Updates' button: **Cancel Updates** .

TXDWC Trading Partner Profile Registration Email Example

Upon **completion** of the EDI Trading Partner Profile online, an auto response email will be sent to the preparer, primary contact, secondary contact, EDI Vendor contact (if applicable), the TXDWC EDI Support Team and to the TXDWC. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Below is an example of the TXDWC EDI Trading Partner Profile registration. The information that is completed on the profile will be included in the email.

-----Original Message-----
From: noreply_wccapture_register_PROD@iso.com
Sent: Thursday, October 7, 2021 2:34 PM
To: txdwcedi@tdi.texas.gov
Cc: txdwcedi@iso.com ; *Preparer's Email; Primary Contact's Email here, Secondary Contact's Email here; Filing Method Contact here*
Subject: EDI New Profile TX - *Your Company's Name here*

-----Original Message-----

-- Claims Electronic Data Interchange Profile --
Jurisdiction: TX
EDI Profile: New

-- EDI Sender/Receiver (Primary Insurer/TPA) –
Company Name: Sender Trading Partner Name
Company Type: Insurer
Master FEIN: 968596859
Postal Code: 123451231
Group FEIN: 968596859

-- Preparer Contact Information --
Preparer Name: Sandy Smith
Preparer Title: Associate Claims Handler
Preparer Addr 1: 123 Business Drive
Preparer Addr 2:
Preparer City: Jersey City
Preparer State: NJ
Preparer Zip: 07030
Preparer Phone: 123-456-9688
Preparer Fax: 123-334-96857
Preparer Email: prepareremail@company.com

-- Filing Information --
Filing Method: EDI Vendor
Vendor Company: EDI Vendor Name
Contact Name: Maria Perez
Contact Phone: 123-456-7890
Contact Email: example@vendor.com

-- Primary Contact for EDI Implementation/Setup --
Primary Contact Type: Business
Primary Contact Name: John Smith
Primary Contact Title: Business Systems Analyst
Primary Contact Addr 1: 123 Example Ave
Primary Contact Addr 2:
Primary Contact City: Jersey City
Primary Contact State: NJ
Primary Contact Zip: 07310
Primary Contact Phone: 123-456-7890
Primary Contact Fax: 123-456-7891
Primary Contact Email: example@company.com

-- Secondary Contact --
Secondary Contact Type: Technical
Secondary Contact Name:
Secondary Contact Title: Technical
Secondary Contact Addr 1: 123 Example Ave
Secondary Contact City: Jersey City
Secondary Contact State: NJ
Secondary Contact Zip: 07310
Secondary Contact Phone: 123-456-7895
Secondary Contact Fax: 123-456-7887
Secondary Contact Email: secondarycontact@company.com

-- Insurers --

-- Insurer (1) --
Action: Add
Insurer Status: Active
Insurer FEIN (DN0006):   123456789
Insurer Name (DN0007):   Example Insurer 1

Insurer Type: Insurer

-- Insurer (2) --
Action: Add
Insurer Status: Active
Insurer FEIN (DN0006):   998557744
Insurer Name (DN0007):   Example Insurer 2
Insurer Type: Certified Self-Insurer

-- Claim Administrators --

-- Claim Administrator (1) --
Action: Add
Claim Administrator Status: Active
Claim Admin FEIN (DN0187):   968596859
Claim Admin Name (DN0188):   Legal Name of Claim Administrator Entity
Claim Admin Attention Line:
Claim Admin FEIN (DN0187):   363917295
Claim Admin Name (DN0188):   Broadspire, a Crawford Company
Claim Admin Attention Line: Attn: Sr. Claims Administrator
Office Contact Name: John Bryant
Office Contact Phone: 123-456-2323
Office Contact Email: exampleclaimadmincontact@example.com
Mailing Primary Addr: P.O. Box 11111
Mailing Secondary Addr:
Mailing City: Jersey City
Mailing State Code: NJ
Mailing Postal Code: 0703101111
Physical Primary Address: 145 Washington Avenue, Suite 500
Physical Secondary Address:
Physical City: Jersey City
Physical State Code: NJ
Physical Postal Code: 0703102926

Number of jurisdictions currently reporting to: 3