EDI Enrollment Questionnaire

Plan Questions		
Seperating Groups	How will your membership be classified? For example, will they be grouped into Active EE, Cobra EE?	
Group Size	How many eligible employees will there be in the group? How many eligible dependents will there be in the group?	
Invoice Setup (**New Groups Only**)	How will you want your invoice broken out?	
Benefits Selection	Will you be offering Medical, Pharmacy, Vision, and Dental benefits?	
Plan Categories	We assume that all members and their dependents are eligible for all plan/products for the group. If this is not the case (for example, separate senior leadership options), please let us know.	
Product Type	HMO, PPO, or EPO, etc.?	
If PPO, is Pre X Required?		
Retirees	Do you cover Retirees? If yes, are their benefits different from active members?	
PCP Requirement		
Dependent Child Max Age Rules	PHS follows the "Universal 25" rule which states that children who are not handicapped are covered until the age 25 regardless of student status. Coverage is extended to the end of the month in which the dependent child turns 25. If the group requires annual certification, the group will need to administer this themselves.	
Domestic partner/life partners covered	Does the trading partner cover domestic partner/life partners? If yes, INS02 must be submitted with indicator 53.	

Handicap (INS10)	Will file include handicapped children/dependents? If yes, INS10 must be submitted with N or Y.	
Retro add/Retro term	Any retro-adds or retro-terms will not exceed 90 days from the date of the file. Any retro-adds or retro-terms of greater than 90 days will be handled manually between PHS and trading partner.	
Date of Hire	PHS requires that the date of hire be submitted under DTP01 = 336 (ccyymmdd)	
Secondary coverage information	Will trading partner file contain any secondary coverage information?	

Technical Requirements
Adhering to the following requirements will allow for more error-free processing.

File Format	The EDI Enrollment file will be in the 834 format.
Frequency of File	Files will be submitted to PHS either weekly, every 2 weeks, or monthly.
FTP Requirements	Files will be FTP's to PHS. PHS will not pull enrollment files from external sites.
Test file	Please provide test file(s) at least 4 weeks before we go live.
Terminations	The termination date must be submitted on the file.
Effective dates	The file must include the effective date.
Social Security Number	Either a social security number or some other unique identifier will be provided for each employee in the SSN field. The employee and the employee's dependents may not share the same identifier.
Newborns	The effective date of newborns will be the date of birth.
Guardianship or Adoption	The effective date for adopted children will the the date of placement. In the case of guardianship, the effective date will be the first of the month following the court decree until the age of 18.
Void	A member row should never be submitted where the effective date and ternimation date are the same. The termination date should be equivalent to the effective date minus one day.
Duplicate Member Rows	Do not send duplicate member entries in one file. For example, do not sent an entry with the employee only and then a separate entry with the employee and the employee's dependents. This will cause an error and the employee and dependents will not load.

Technical Questions	Response

Full or Partial File	Will the file be a full roster of all active membership or will it contain only changes (partial)? Will this include your Cobra Participants?	
File submission	Will the trading partner submit the file or a Broker or Third Party Aministrator (TPA)?	
Name of Technical Person	Please provide the name, phone number and e-mail of your technical person for FTP set up.	