

An EDI Trading Partner is defined as any Blue Shield/Blue Shield Promise customer (provider, billing service, software vendor, employer group, financial institution, etc.) that transmits to, or receives electronic data from Blue Shield/Blue Shield Promise.

Trading Partners that submit claims/encounters must be submitted in the EDI 837 5010X12 format. Trading Partner must submit 1,500+ claims/encounters consistently on a monthly basis.

Any Trading Partner who would like to submit electronic transactions must complete and forward a Trading Partner Agreement (TPA) and EDI Enrollment Form to Blue Shield/Blue Shield Promise EDI Business Operations. To obtain the TPA and EDI enrollment forms and for additional information, see [Enroll in EDI](#).

The TPA must be completed and signed by an authorized representative of the organization. Complete and accurate reporting of information on all documents will ensure that our request is processed in a timely manner.

Testing and Certification Process

To submit 837 claims/encounters as a new Trading Partner with Blue Shield/Blue Shield Promise, we require EDI transactions to be tested. There are two phases of testing. EDI Business Operations, along with the Trading Partner, will coordinate testing. EDI Business Operations will determine when the Trading Partner has completed testing and is ready for production.

Testing Requirements

The testing will involve connecting to Blue Shield/Blue Shield Promise through SFTP protocol and submitting validated transaction files. Transactions will be loaded into our test environment and validated through our internal processing system. EDI acknowledgements (TA1, 999, and 277CA) will be returned indicating the results of the test. Trading Partners must be able to receive acknowledgements correcting and resubmitting previously rejected records. Any Trading Partner that submits encounters will include the testing for the secondary 277CA file as well. (See [FAQs](#) for the secondary 277CA).

The Trading Partner is approved for production implementation once successful testing is completed and at least 95% of transactions are accepted with no HIPAA rejections.

Certification Requirement

Testing may require two to three rounds of accepted files before implementation to production.

Trading Partner Agreement

Trading Partner Agreements (TPAs) define the duties and responsibilities of the partners that enable business documents to be electronically interchanged between them.

TPAs are required by Blue Shield/Blue Shield Promise clearinghouses that assist in processing electronic transaction on behalf of their clients. TPAs define Trading Partner, Blue Shield/Blue Shield Promise, and mutual obligations under the contract.

The Trading Partner Agreement is related to the electronic transaction process and to the electronic exchange of information, whether the agreement is an entity or part of a larger agreement, between each party of the agreement.

Receiving the Transaction

The SFTP (Sterling) server provides a path for electronic transmission of confidential data to and from Blue Shield/Blue Shield Promise's Trading Partners. The server is protected behind a firewall. A unique login ID and password is created for each Trading Partner.

Connection to the server is only possible through the firewall using standard FTP connections or SSH/SFTP connections over the internet. We use PGP encryption to ensure the data is kept confidential when using standard FTP connections. In most cases, the Trading Partner will be responsible for pushing and pulling files from the Blue Shield/Blue Shield Promise FTP server.

A Trading Partner's password to access SFTP is assigned by Blue Shield/Blue Shield Promise system administrators. A password may be reset by Blue Shield upon request from the Trading Partner.