



## *An EDI Testing Strategy*

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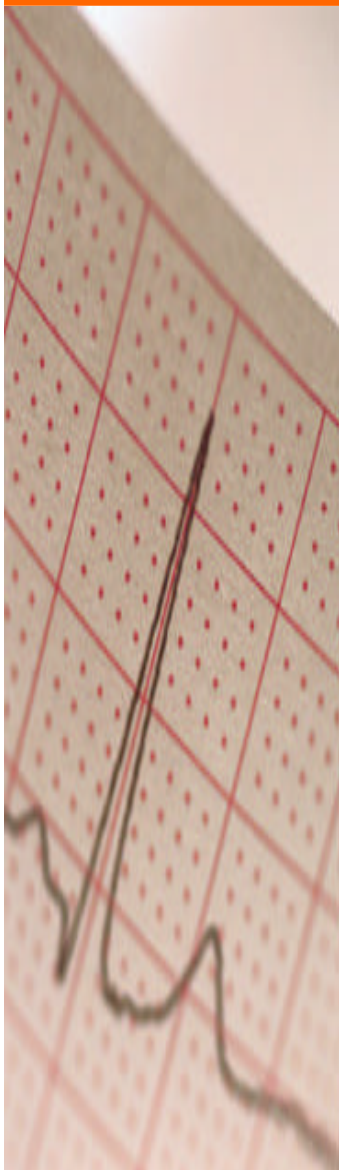
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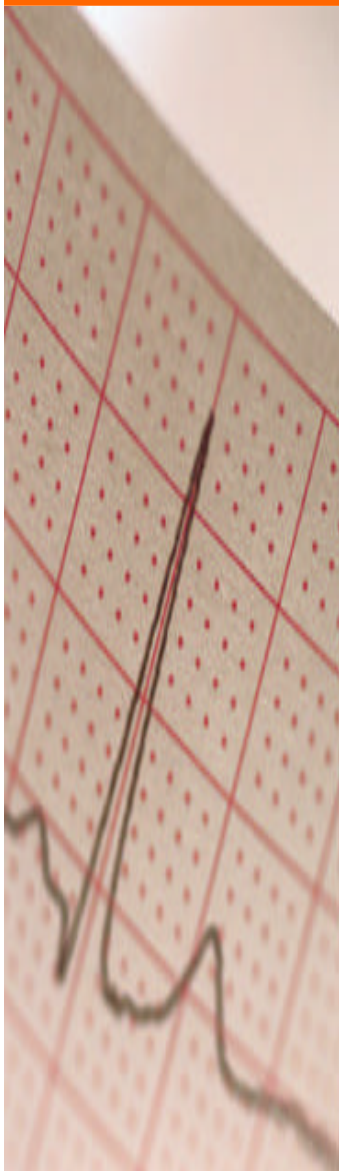
# Overview

- Why do you need it and What is it?
- What should be included in a testing strategy?
- What are some risks to a successful testing project?
- What to do and Where can you go for more information?



# Why do you need it?

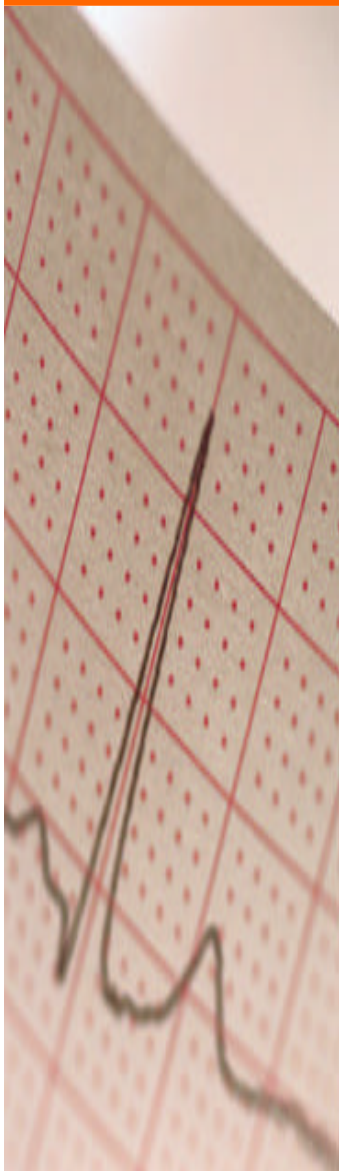
- When have you ever implemented so many software changes to multiple systems?
- When have you ever implemented software changes that also greatly impacted your business processes?





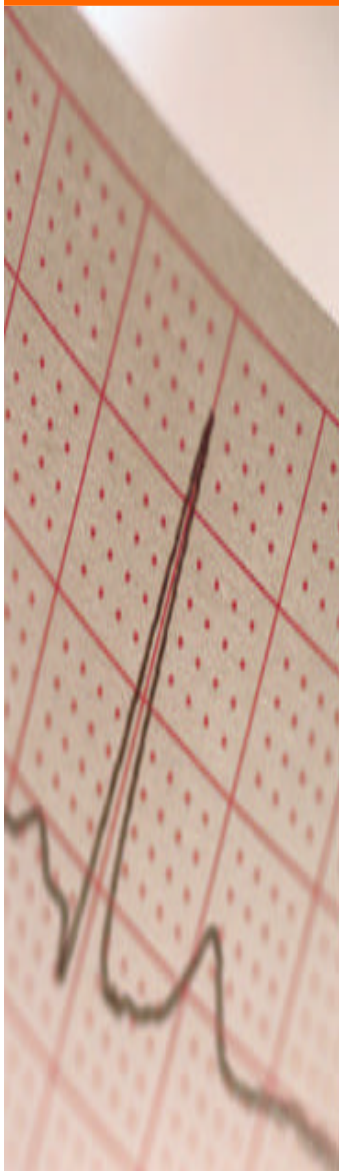
# Why do you need it?

- When have you ever had to test so many levels as part of the testing phases
- When have you ever had to test with all your submitters when implementing software changes?



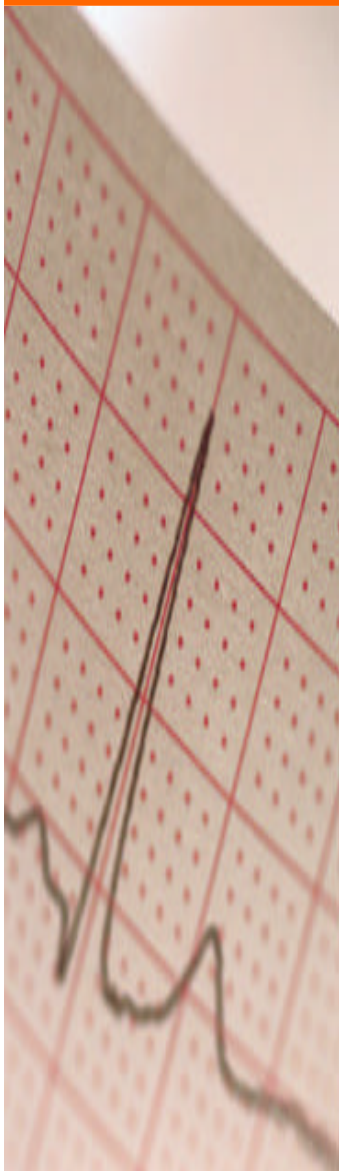
# Why do you need it?

- When have you ever made such significant changes that will be implemented along with other corporate initiatives?
- When have you ever had to implement so many changes with an aggressive deadline date that are influenced by the completed work of many of your vendors



# What is it?

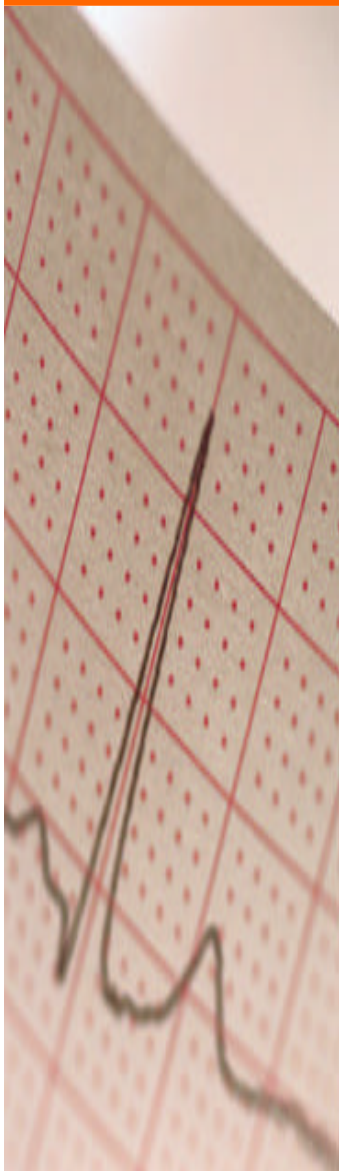
- A high level plan to support the objectives of your testing approach
- A definition of the resources (software, hardware and people) needed during the course of the process





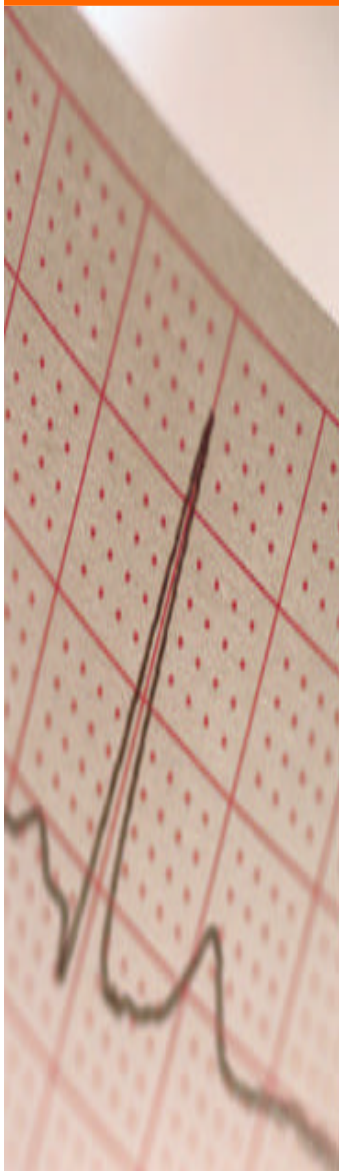
# What is it?

- A list to assist the team (at a high level) in understanding the events that need to take place
- A guide/checklist as the detail plans are developed.



# What is it?

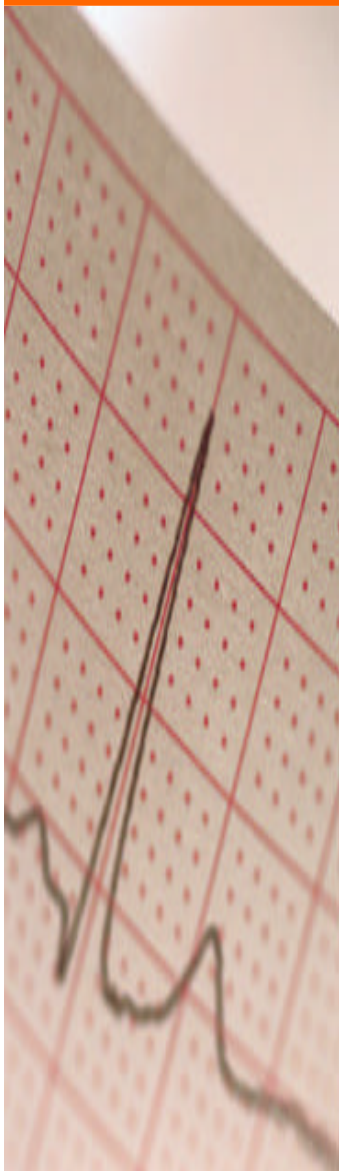
- A first look at the risks and dependencies that could impact the success of the testing effort
- A list of the deliverables that will be created and used during the testing events





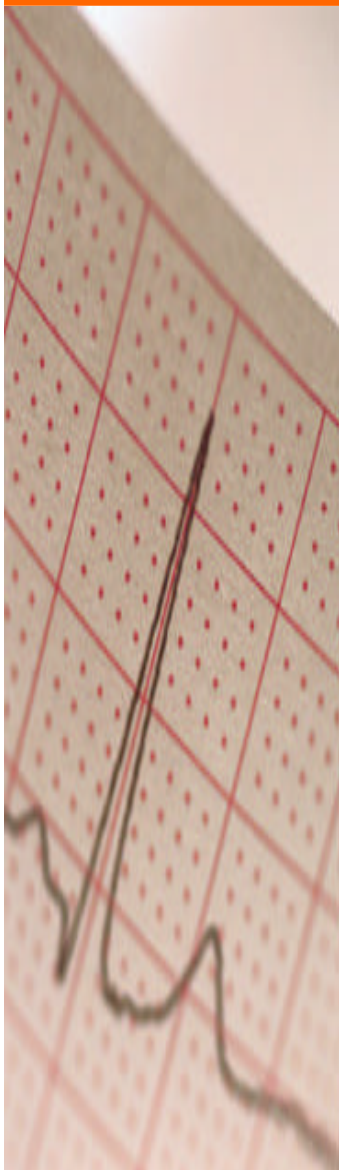
# What should be included?

- The scope of the testing effort
  - Transactions, code sets, software changes
  - Lines of business
  - Trading partners
  - Interfaces
  - Special processing
- The phases and techniques
- Test schedule (high level)
- Acceptance criteria



# What should be included?

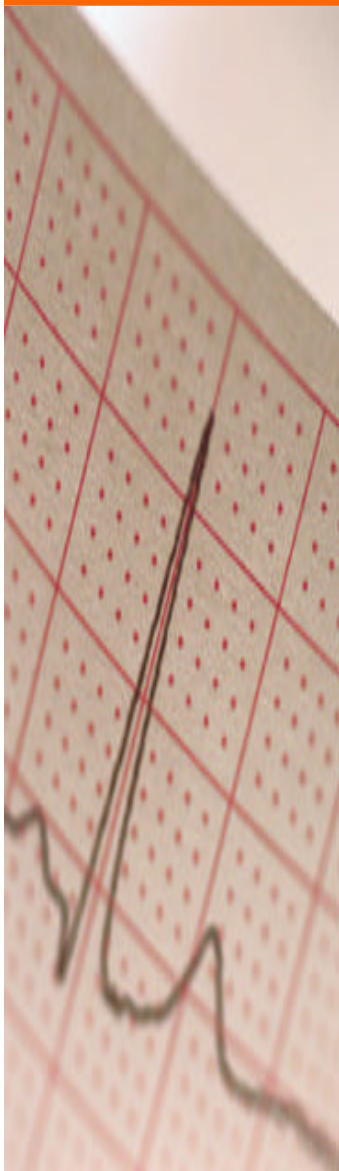
- Roles and Responsibilities
- Description of the test environment
- Test data management process
- Test reporting process and controls
- Transactions flowing through the systems



# Creating transaction flow

Things to think about?

- What contacts are made internally for EDI work to start?
- How do you communicate with your external IS (in the provider organization) contacts?
- What is the timetable for bringing a new major provider into a full EDI relationship?
- How are inbound/outbound transmissions tested?

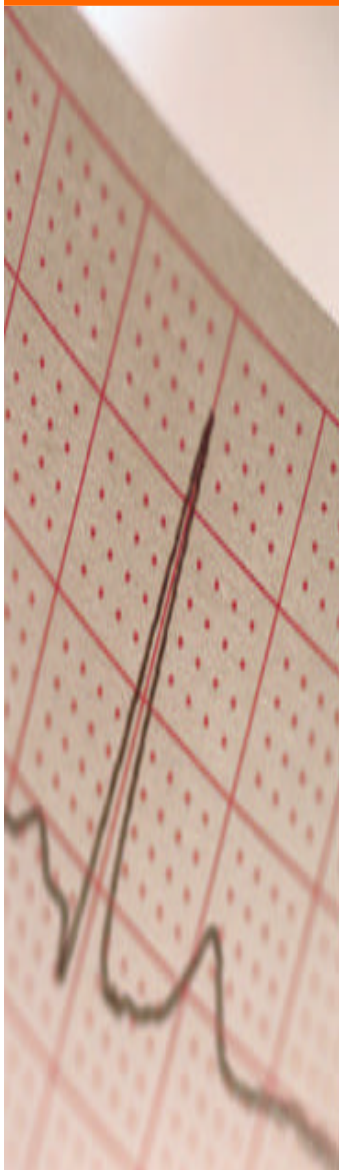




# Creating transaction flow

Things to think about?

- What reports are generated during the EDI process?
- Where are the reports from?
- Where do the reports go?
- Who monitors the EDI reports?
- Who handles EDI errors?
- What non-standard data files are created for external entities?
- What non-standard data files are received from external entities?



# Creating transaction flow

## Touch point table?

### 1 System XYZ

#### 1.1 837 Inbound Claim Touch Point Table (System XYZ)

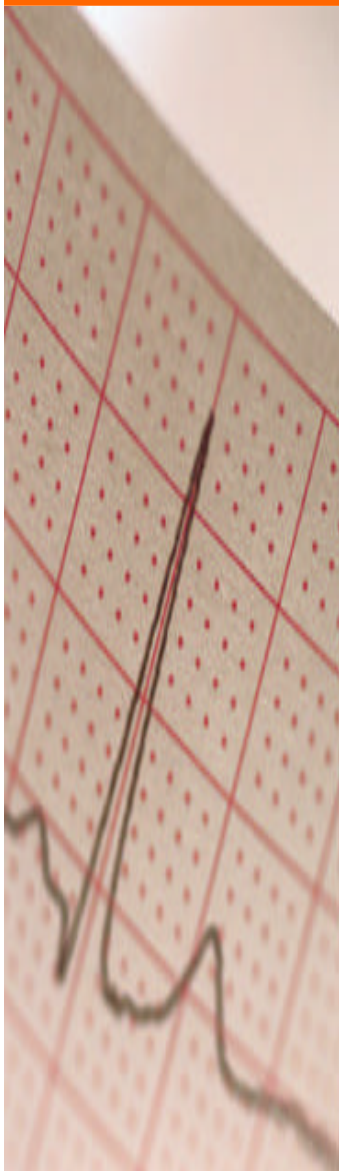
#	Pathway Description	Related Transaction	Related HIPAA Touch Points	Touch Point Contact Name
1	Paper Claims via Reformat XXX to Claims Processing	837	Mailroom	
			Imaging	
			Reformat XXX	Mary Jones
			System XYZ	



# What are some risks?

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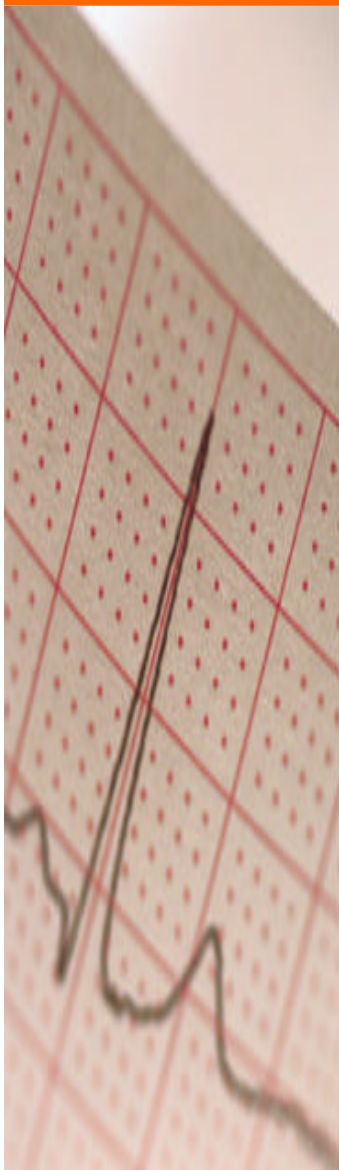
- Large number of changes to be tested
- Large number of testing events to be included
- Availability of the test environment when needed
- Available testing resources





# What are some risks?

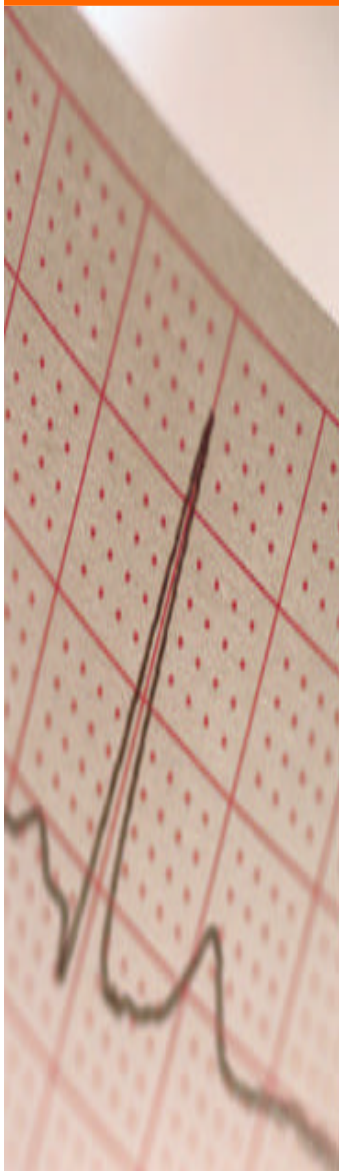
- HIPAA knowledgeable testing resources
- Large number of testing with partners
- Tight testing schedule
- Dependencies on vendor software



# What to do?

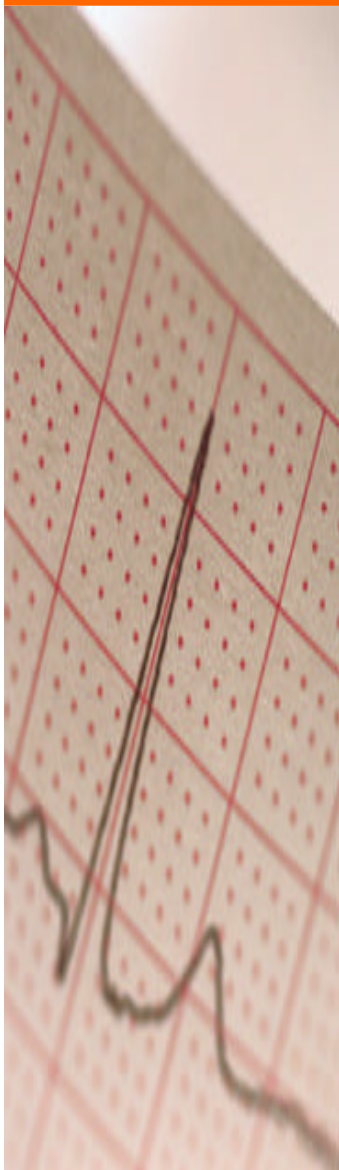
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- Start the test planning process now
- Assign a test manager
- Get all parties involved now
- Track issues and risks



# What to do?

- Resolve issues and mitigate risks quickly
- Identify resources needed
- Identify tools needed to support the effort
- Identify training requirements





# For more information?

- [www.wedi.org](http://www.wedi.org)
  - White papers
    - Transaction compliance certification
    - Business-to-business transaction set testing
- [www.claredi.com](http://www.claredi.com)
  - Test files
  - Scenarios



# Thank You !

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