EDI Carrier Connectivity Best Practices

EDI Implementation takes an average of 8 to 12 weeks. By following these best practices, you can easily accelerate your timeline for a seamless process.

Step 1: Requirements Gathering

After you've placed an order with eBN, our Carrier Relations Team will contact your carrier to request the following:
- 834 guide or layout if carrier is not already in our network
- Group Structure
- Transmission Information (FTP/SFTP) if carrier requires one per group

Best Practice: About 50% of carriers require **authorization forms to be signed** by the Group/Employer for EDI Implementation to begin; please be on the look out for these forms if needed.

Step 2: Pre-Mapping & Dataset Validation

During the Pre-Mapping phase, you will need to ensure your enrollment/elections are entered in your system so our analysts can setup the pre-mapping form and data format validation. At this stage, we can either pull the data directly from your system or your system will send us a file.

Best Practice: Partners that **use the Carrier Census** data to populate their system beforehand can greatly reduce the time spent sending test files and reconciling data.

Step 3: Mapping

During the Mapping phase, eBN will match the customer data that is within their system to the carrier's file specifications.

Best Practice: Partners that **use the Group Structure** directly from the carrier to setup their benefit plans in their system can reduce time to production by *weeks*.

Step 4: Testing

In the Testing phase, eBN will test the file with the carrier, fix any technical or mapping errors and obtain the carrier data discrepancy reports for reconciliation by the Partner or Group - who must reconcile the data between the two systems.

Best Practice: Data discrepancy resolution should be done within **48 hours** of receiving the report to reduce the implementaton timeline and minimize the risk of additional data discrepancies. If possible, keep updating both the carrier and HR system to not face more data discrepancies.

Step 5: Move to Production

During this phase, eBN will get production approval from both the Partner or Group and the carrier, including agreement on the automated schedule for the file.

Best Practice: Utilizing the carrier Group Structure and carrier Census Data to populate your system and submitting approvals in a timely manner will **expedite your time to production.**

Step 6: Production & Support

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Once your file is in production, please contact your designated Account Manager with questions or submit a support ticket.

Best Practice: Now that the file is in production, educate the Group on the Open Enrollment process & best practices for a successful Open Enrollment season without disruption in coverage.