



# Encounter Data Front-End System (EDFES) User Guide



**PALMETTO GBA**<sup>®</sup>  
A CELERIAN GROUP COMPANY

## TABLE OF CONTENTS

### Contents

<b>LIST OF FIGURES</b>	<b>3</b>
<b>LIST OF TABLES</b>	<b>3</b>
<b>TRADEMARK INFORMATION</b>	<b>4</b>
<b>INTRODUCTION</b>	<b>4</b>
<b>WHO TO CALL AND HOURS OF OPERATION</b>	<b>4</b>
<b>EDFES AVAILABILITY</b>	<b>4</b>
<b>PRODUCTION CYCLE</b>	<b>5</b>
<b>TESTING AND CERTIFICATION REQUIREMENTS</b>	<b>5</b>
<b>EDFES OVERVIEW</b>	<b>6</b>
<b>REQUIREMENTS FOR USING THE EDFES</b>	<b>6</b>
<b>CONNECTING TO THE EDFES</b>	<b>7</b>
<b>CONNECTIVITY</b>	<b>7</b>
<b>HOME PAGE</b>	<b>8</b>
<b>NEWS &amp; UPDATES</b>	<b>9</b>
<b>LOGGING INTO THE EDFES</b>	<b>10</b>
<b>UPLOAD FILE</b>	<b>11</b>
Upload Restrictions.....	11
Upload Tips.....	11
Upload File Storage on Palmetto GBA System.....	11
<b>MAILBOX</b>	<b>15</b>
Downloading Files from Your Mailbox .....	15
Deleting Files from Your Mailbox .....	17
Viewing Files in Your EDFES Mailbox.....	18
<b>ERROR CODE LOOKUP PAGE</b>	<b>20</b>
<b>GET ASSISTANCE</b>	<b>22</b>
<b>CONNECT USING SFTP</b>	<b>23</b>
SFTP Application Software .....	23
Connect to Palmetto GBA using SFTP.....	23
Sending Files.....	24
Receiving Files.....	24
<b>HELPFUL HINTS</b>	<b>25</b>

## List of Figures

Figure 1 – EDFES Home Page .....	8
Figure 2 – News & Updates Page .....	9
Figure 3 – Login Page.....	10
Figure 4 – File Upload Page .....	12
Figure 5 – File Selection Dialog Box.....	13
Figure 6 – Successful File Transfer .....	14
Figure 7 – Mailbox Page.....	15
Figure 8 – Preparing Downloads .....	16
Figure 9 – File Delete Confirmation Page .....	17
Figure 10 – Lists of Selected Files.....	18
Figure 11 – Viewing a File .....	19
Figure 12 – Error Code Search Page.....	20
Figure 13 – Successful Error Code Search .....	21
Figure 14 – Documents Page .....	22
Figure 15 – SFTP Screen Shot #1 .....	23
Figure 16 – SFTP Screen Shot #2.....	24
Figure 17 – SFTP Sending File Screen Shot.....	24
Figure 18 – SFTP Receiving File Screen Shot .....	24

## List of Tables

Table 1: Acronyms.....	26
Table 2: Record of Change .....	27

## TRADEMARK INFORMATION

PK-ZIP® Software version 14+ is a licensed product of PKWARE, Inc. This user manual references materials from the PK-Zip Read Me File.

Microsoft Internet Explorer® is a licensed product of Microsoft Corporation.

Any other software referenced within this manual, or any other publication of Palmetto Government Benefit Administrators (GBA), Limited Liability Company (LLC) is licensed or copyrighted by their respective companies and is for informational purposes only.

## INTRODUCTION

Web services such as file upload and mailbox maintenance are the main functions of the Encounter Data Front-End System (EDFES). Using a browser, registered users may browse the EDFES site for Encounter Data (ED) related documentation and other useful information. The file transfer function allows registered users to transfer and create electronic data using any type of platform (i.e. Windows 7+, UNIX, Macintosh, etc.). Connection to the EDFES to upload and download files is possible using a web browser. Internet Explorer version 8.0 or higher is recommended and supported. Other browsers may be used. However, the EDFES technicians currently only support Internet Explorer.

## WHO TO CALL AND HOURS OF OPERATION

Questions regarding the EDFES or the submission of ED data should be directed to the Customer Service and Support Center (CSSC) Help Line at (877) 534-CSSC (2772), or you may consult the [Help](#) menu option from the EDFES web site.

## EDFES AVAILABILITY

The EDFES is available for use 24 hours a day 7 days a week. The CSSC Help Line is unavailable on the following holidays:

**New Year's Day**  
**Martin Luther King Day**  
**Memorial Day**  
**Independence Day**  
**Labor Day**  
**Thanksgiving Day and the day after**  
**Christmas Eve and Christmas Day**

## PRODUCTION CYCLE

Production Cycles run 8 times a day. ED submitted via the EDFES must be completely transmitted prior to the start of each cycle. The first production cycle begins at 6:00 a.m. Eastern Time (ET), every 2 hours until 8 pm ET.

## TESTING AND CERTIFICATION REQUIREMENTS

Submitter testing and certification is required to ensure there are no data flow issues between the Submitter and the EDFES. Testing and certification also ensures the data submitted is valid and formatted correctly. When ready to send test and/or certification data please notify CSSC Operations through the CSSC Help Line at (877) 534-CSSC. Centers for Medicare & Medicaid Services (CMS) will process this data and return reports the next day. CSSC Operations is available to offer guidance on the submission of test/certification data.

### EDFES OVERVIEW

The EDFES contains the following menu options:

- **Home:** Returns the registered user to the EDFES Home Page.
- **Mailbox:** Allows the registered user to download, view and delete responses and reports from their mailbox.
- **Upload File:** Allows the registered user to upload ED data files.
- **Error Codes:** Allows the registered user to look up descriptions for Error Codes.
- **Help:** Allows the registered user to view and download documents pertaining to the EDFES.
- **News & Updates:** Provides information on newly added features and information.

### REQUIREMENTS FOR USING THE EDFES

File upload and retrieval are the main components of the EDFES. To access the EDFES web site users must have a web browser. Internet Explorer version 8.0 or higher is recommended and supported. Other browsers may be used. However, the EDFES technicians currently only support Internet Explorer.

### CONNECTING TO THE EDFES

A connection with an approved Network Service Vendor (NSV) must be in place prior to the establishment of an Internet Protocol (IP) connection with the EDFES.

All submitters with existing network access have been authorized by Palmetto GBA to connect to the EDFES.

In order to submit ED files to the EDFES, you must be enrolled at CSSC Operations. If you are not enrolled, please contact the CSSC Help Line at (877) 534-CSSC. Once enrolled, you will receive a Submitter Identification Data (ID) and password.

**NOTE:** This password is case sensitive. You must enter your original password exactly as it was assigned to you by CSSC Operations.

### CONNECTIVITY

1. Refer to the documentation provided to you by the NSV for accessing the network.
2. Once you have connected, start your browser.
3. Enter the following into the Uniform Resource Locator (URL) or address field: `http:// <HOST NAME>/edfs`
4. Press **ENTER**.

## HOME PAGE

Once connected, the user will see the EDFES Home page, as shown below in **Figure 1**. The tabs across the top of the Home page allow the user to access the various functions. The left-hand panel provides the user with several help references.

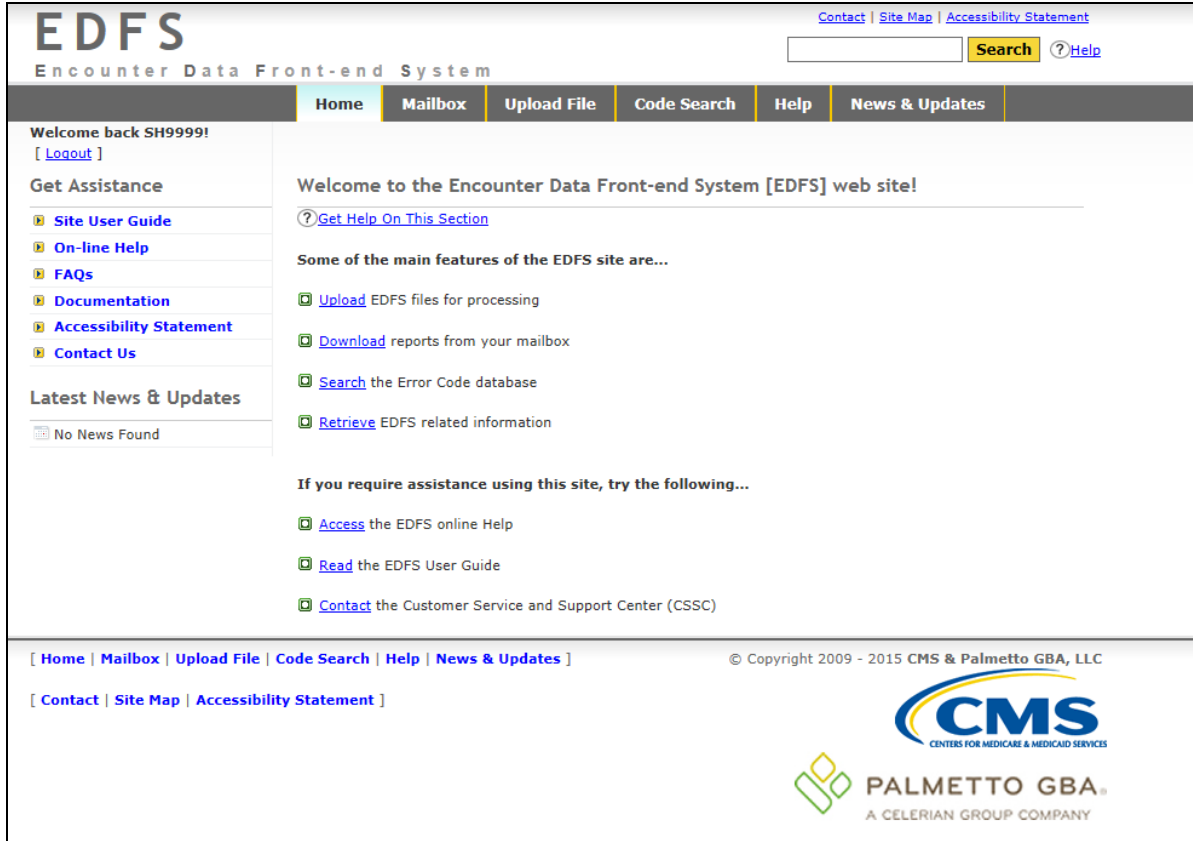


Figure 1 – EDFES Home Page



## NEWS & UPDATES

New information pertaining to the EDFES is available in the **News & Updates tab** shown in **Figure 2**.

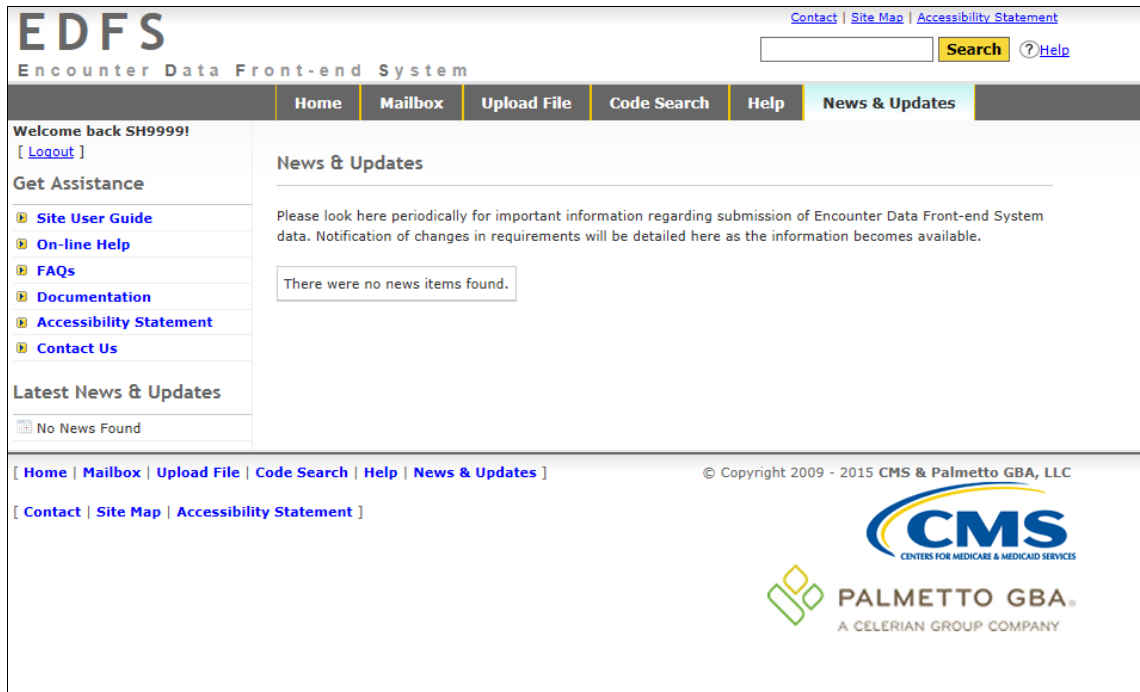


Figure 2 – News & Updates Page

## LOGGING INTO THE EDFES

Users must log into the EDFES system, as shown in **Figure 3**, in order to utilize the file upload and retrieval functions. Users may click the Login link in the upper, left corner of the home page and supply the Palmetto GBA assigned User Name and Password.

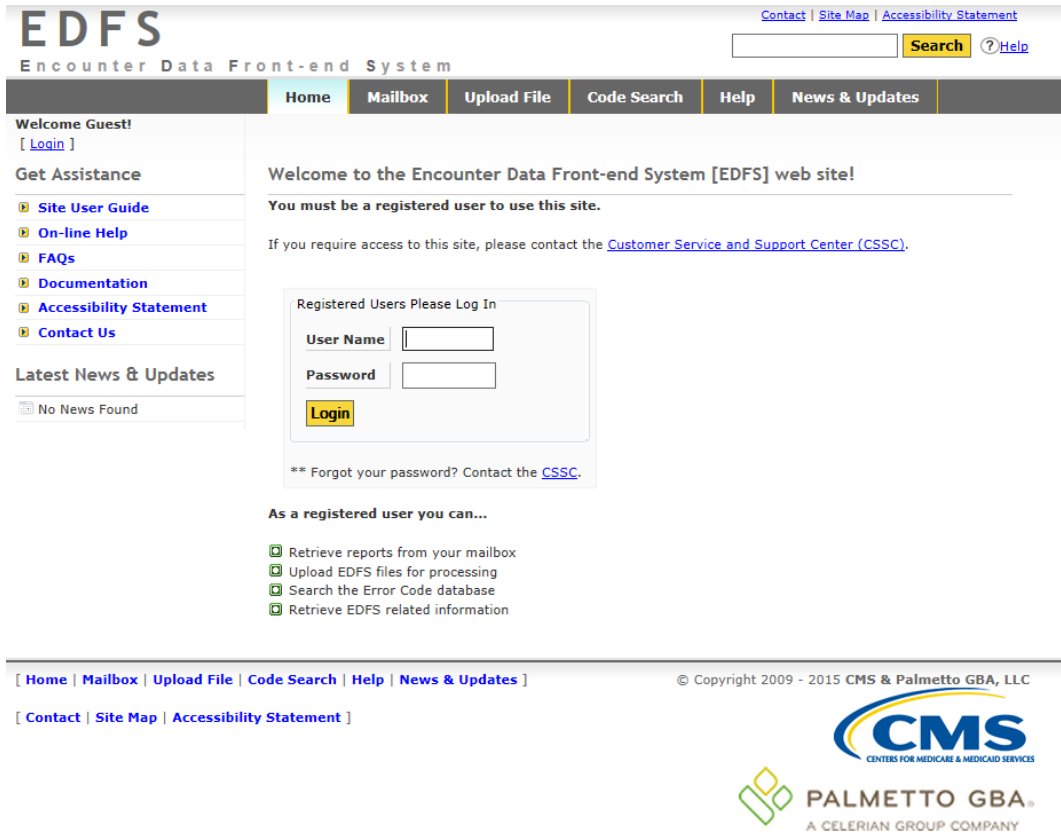


Figure 3 – Login Page

### UPLOAD FILE

Clicking **Upload File** from the main menu will display the page as shown in **Figure 4** on the next page.

#### UPLOAD RESTRICTIONS

- a.) File size is limited to 60 megabytes via the website. It is highly recommended that the Secure File Transfer Protocol (SFTP) command line be used to upload large files\*.
- b.) One file at a time should be uploaded.

#### UPLOAD TIPS

- a.) Compress (Zip) large files prior to uploading.
- b.) Large files can take an extended length of time to upload; this time is dependent on your connection speed.

\*Large files are defined as files containing between 5 and 60 megabytes (1 million records = 51.2 megabytes uncompressed).

#### UPLOAD FILE STORAGE ON PALMETTO GBA SYSTEM

An uploaded file is not stored in a user directory. The file is retained in the system queue directory for approximately 3 days then moved to the archive directory where it is retained for approximately 14 days. Files are retained in the Palmetto GBA system for a total of 17 days. The number of files retained depends on the number of files uploaded within a 17-day window. On the 18<sup>th</sup> day the file is permanently archived.

The steps on the following pages will explain how to select a file on your system to upload to the EDFES.

1. The file selection window of the Upload File tab will appear as shown in **Figure 4**. Click the **Browse** button to select a file to transfer.



Figure 4 – File Upload Page

2. Use the File Upload window, as shown in **Figure 5**, to navigate to the file you wish to upload. You can click on the file and choose Open, or double-click the filename.

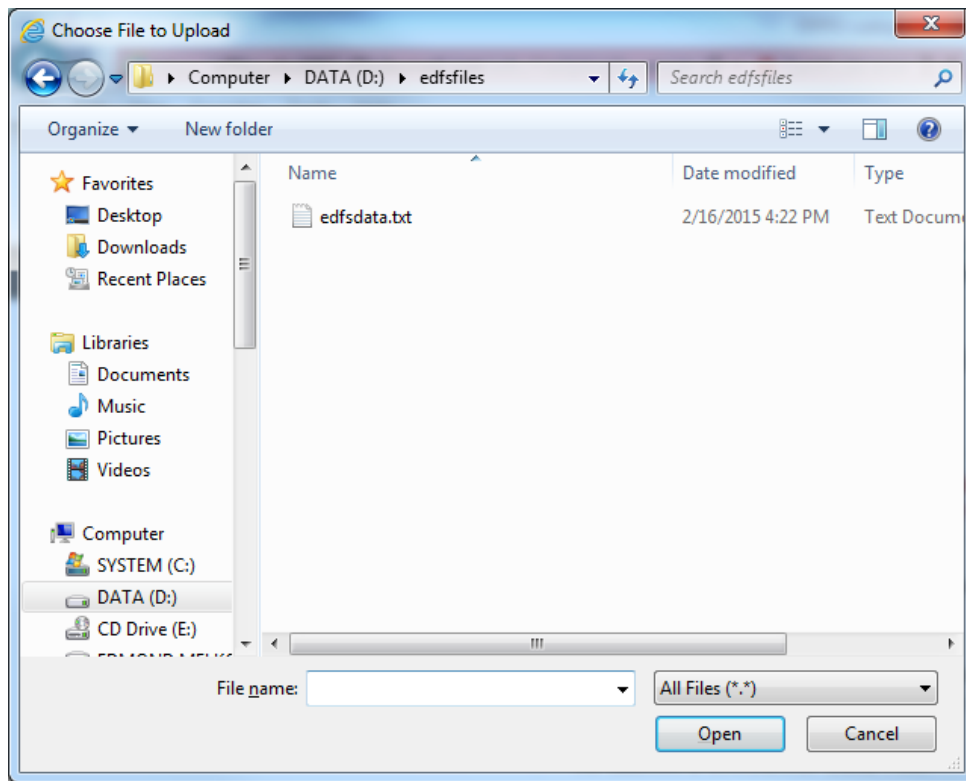


Figure 5 – File Selection Dialog Box

Once you return to the window shown in **Figure 4**, the file selected should appear in the text box next to the Browse button. Click **Upload File** to transmit the file. The window shown in **Figure 6** will then appear after a successful upload. If the upload is unsuccessful, a pop-up window will appear containing the reason for the error.

The screenshot displays the ED FS (Encounter Data Front-end System) interface. At the top left, the logo "ED FS" is prominent, with "Encounter Data Front-end System" written below it. To the right of the logo, there are links for "Contact", "Site Map", and "Accessibility Statement". Below these links is a search bar with a "Search" button and a "Help" icon. A navigation bar below the search bar contains links for "Home", "Mailbox", "Upload File" (which is highlighted), "Code Search", "Help", and "News & Updates".

The main content area is titled "Encounter Data Submission - File Upload Complete". Below this title, there is a link to "Get Help On This Section". The primary message states: "File edfsdata.txt transmission completed." Below this message, a table displays the following information:

Bytes transferred:	5234
Time to transfer:	00:00:01

Below the table, the text reads: "Your response file will be available shortly." and "You can check for your response in your [Mailbox](#)." A yellow button labeled "Upload Another File" is positioned below this text. At the bottom of the main content area, a note states: "If you do not receive a response within 24 hours from your completed transmission, please contact the [CSSC](#)."

The left sidebar contains a "Welcome back SH9999!" message with a "Logout" link, a "Get Assistance" section with links to "Site User Guide", "On-line Help", "FAQs", "Documentation", "Accessibility Statement", and "Contact Us", and a "Latest News & Updates" section with a "No News Found" message.

The footer of the page includes navigation links: "[ Home | Mailbox | Upload File | Code Search | Help | News & Updates ]", copyright information: "© Copyright 2009 - 2015 CMS & Palmetto GBA, LLC", and the logos for "CMS CENTERS FOR MEDICARE & MEDICAID SERVICES" and "PALMETTO GBA A CELERIAN GROUP COMPANY".

Figure 6 – Successful File Transfer

## MAILBOX

Clicking the [Mailbox](#) tab from the main menu will display the page shown in **Figure 7**. The files available are those contained in your mailbox directory on the Palmetto GBA system. The file **Size** is indicated in bytes, and the **Date** indicates the date the file was placed in your mailbox.

### DOWNLOADING FILES FROM YOUR MAILBOX

To download files from the EDFES mailbox to your computer, follow these instructions:

1. Click to open the **MAILBOX** tab.
2. Select up to 5 files from the list of available files (use the CTRL and SHIFT keys to select multiple files).
3. Click the **Download** button.

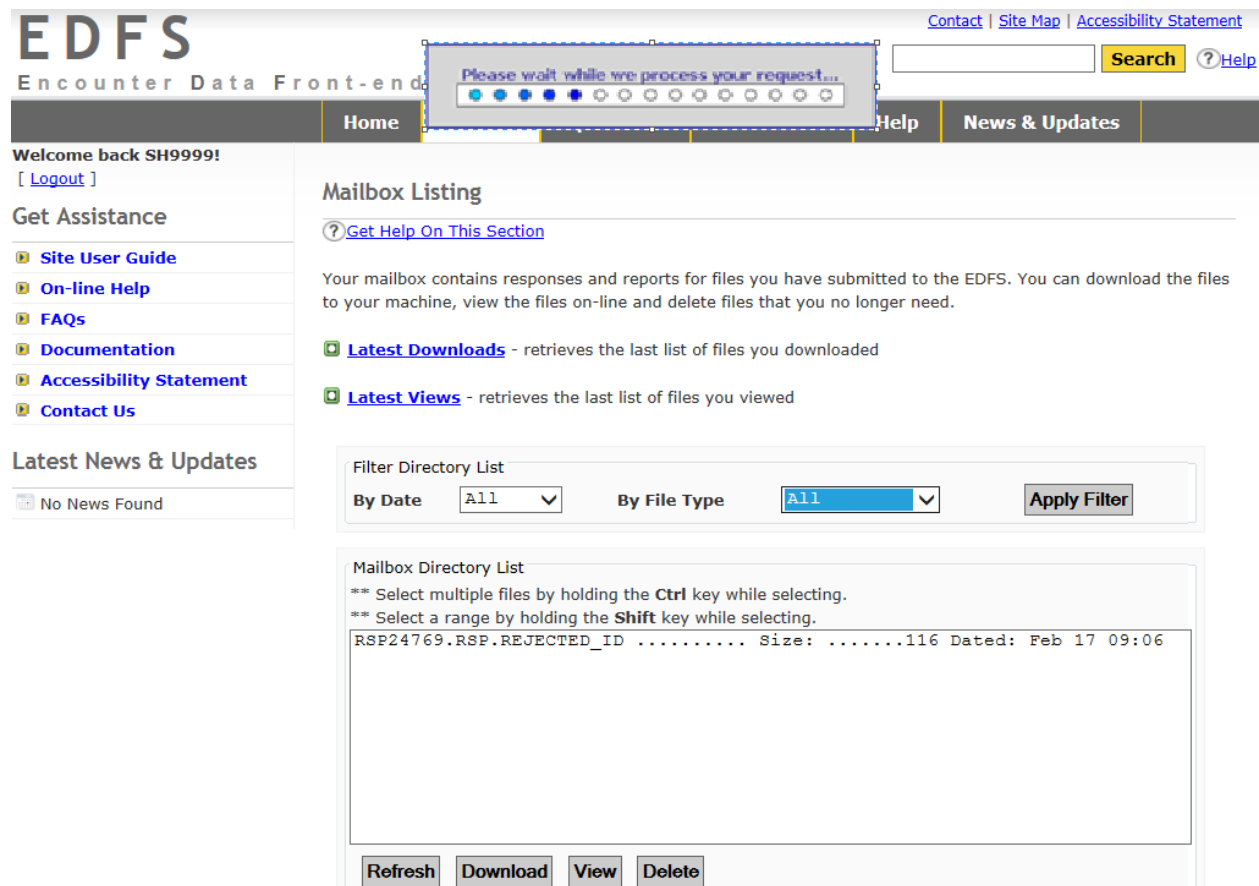


Figure 7 – Mailbox Page

The selected files will be returned once they are retrieved. After the downloads are prepared, you will receive the page shown in **Figure 8**.

This page will list the files you chose to download to your computer. To begin a download **click (left-click) on the filename** and choose **Save**. The files may be downloaded one file at a time, or simultaneously.

The file names chosen will be modified to replace all period separators with underscores, and a file extension will be added. Compressed (zipped) files will receive a **.zip** extension; all other files will receive a **.txt** extension. The added extension eliminates the need to rename zipped files so they are recognized as such by your compression software.

**ED FS**  
Encounter Data Front-end System

[Contact](#) | [Site Map](#) | [Accessibility Statement](#)

**Search** [? Help](#)

**Home** | **Mailbox** | Upload File | Code Search | Help | News & Updates

Welcome back SH9999!  
[ [Logout](#) ]

**Get Assistance**

- Site User Guide
- On-line Help
- FAQs
- Documentation
- Accessibility Statement
- Contact Us

**Latest News & Updates**

No News Found

### View Files

[? Get Help On This Section](#)

**Notes:**  
- The latest set of files downloaded will be removed from the system at midnight.

**How to view the file(s):**  
- Left click on the file name.

File Name	File Date	File Size (bytes)
<a href="#">RSP24737.RSP.REJECTED_ID</a>	Feb 16 16:46	116

You can return to this list by clicking the **Latest Views** link on the mailbox directory page.

**Back To My Mailbox**

If you have problems with the viewing the file, please contact the [CSSC](#).

**Figure 8 – Preparing Downloads**

**NOTE:** Left-clicking on the file may cause some browsers to attempt to display the file. In such a case, you can right-click on the file and choose **Save-as...** option.

To return to the most current list of downloads click the **Back To My Mailbox** button from the **Mailbox** page.



DELETING FILES FROM YOUR MAILBOX

To delete a file(s) from your EDFES mailbox, follow these instructions:

1. Select the file(s) from the list of files, see **Figure 7**.
2. Click the **Delete** button to bring up the confirmation page in **Figure 9**.
3. Select **Delete File(s)** to delete the file(s),

**NOTE:** When **Delete File(s)** is selected, the file will be permanently deleted from your EDFES mailbox as shown in **Figure 9**.

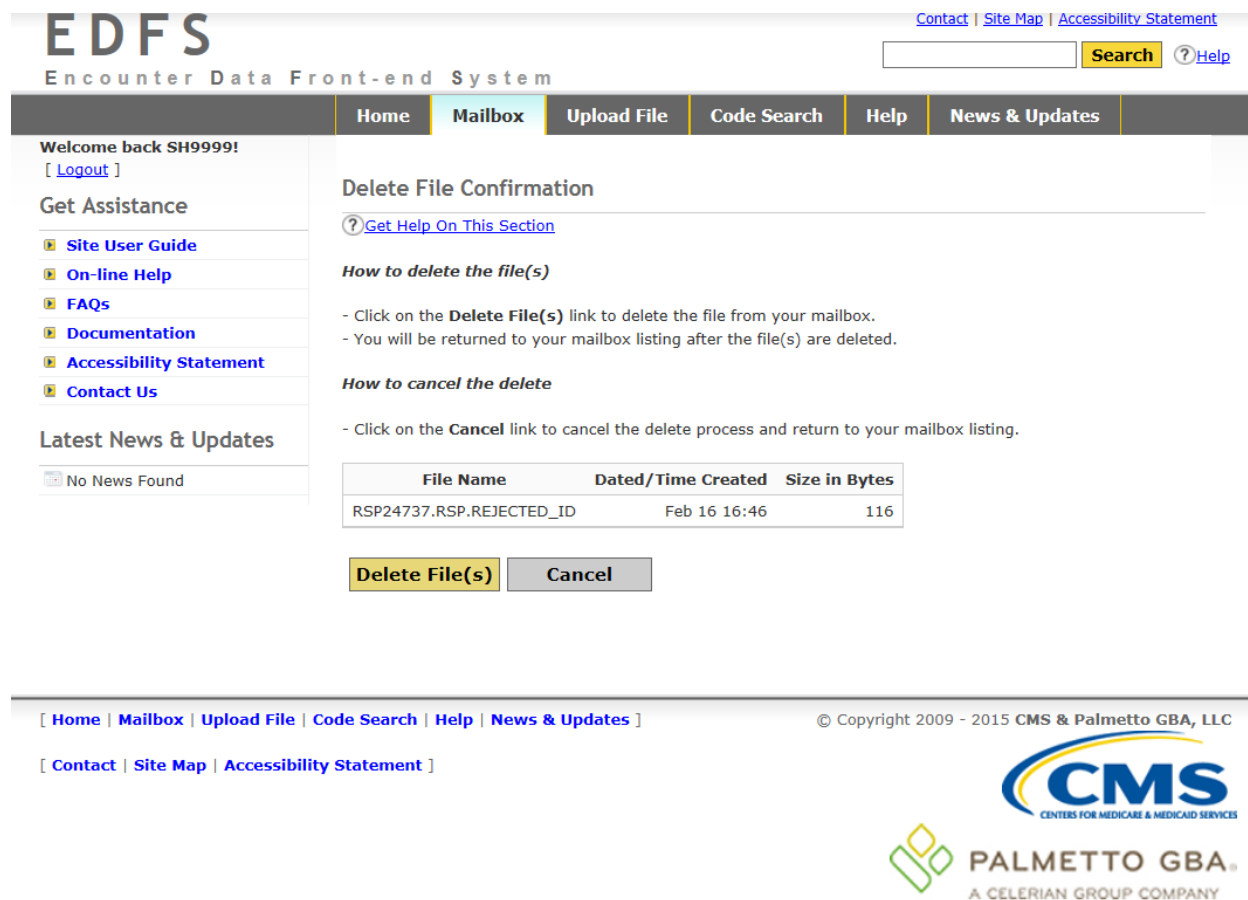
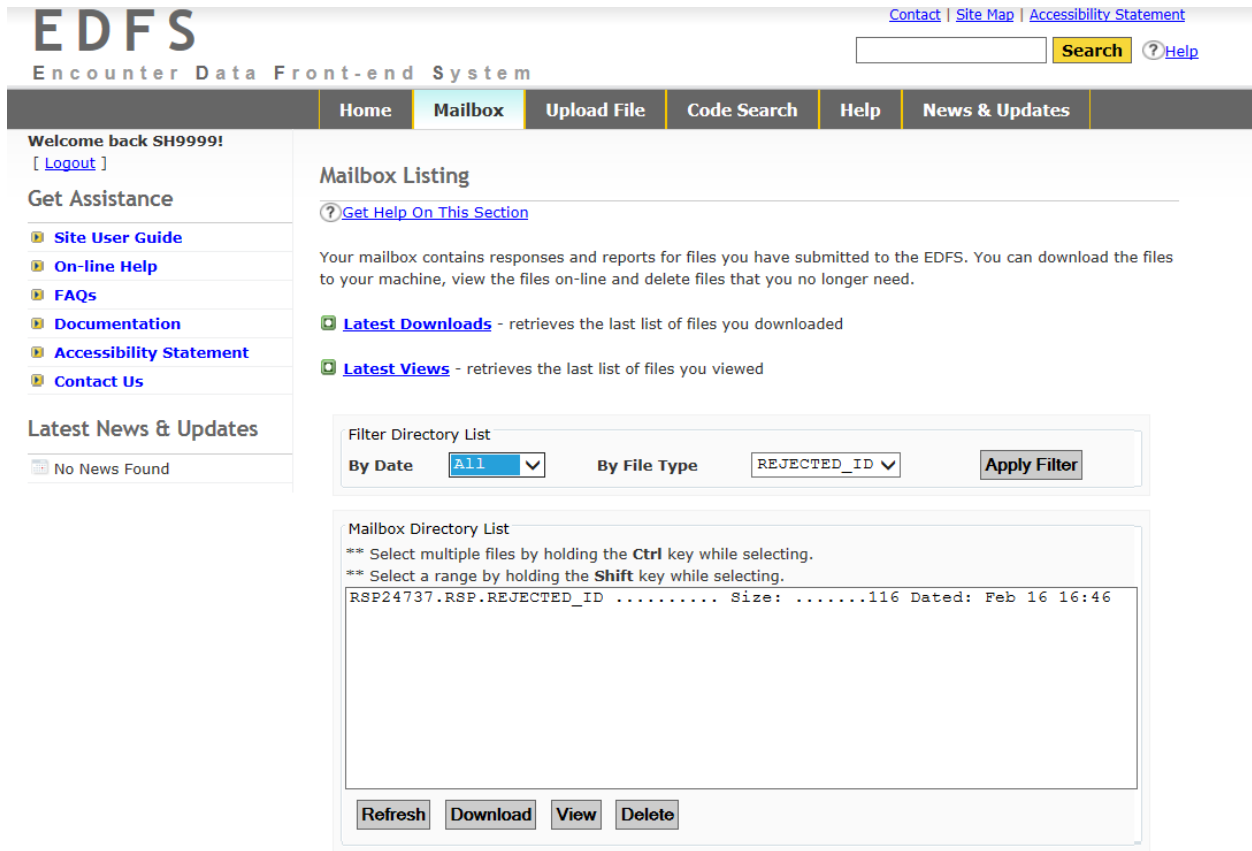


Figure 9 – File Delete Confirmation Page

## VIEWING FILES IN YOUR EDFES MAILBOX

To view files in your EDFES mailbox, follow these instructions:

1. Select up to 5 files from the available list.
2. Click **View**.
3. A dialog box will appear to inform you that the download is being prepared, as shown in **Figure 10**.



**Figure 10 – Lists of Selected Files**

This window below (in **Figure 11**) displays the contents of the file selected.

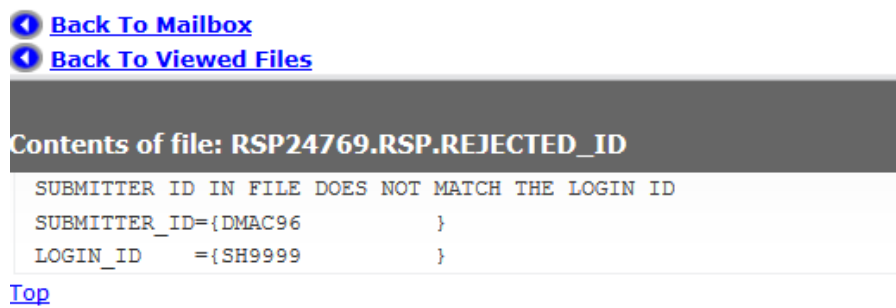


Figure 11 – Viewing a File

To return to the most current list of files click the **Back To Mailbox** link from the **Mailbox** page.

## ERROR CODE LOOKUP PAGE

The **Error Codes** menu option will take you to the window shown in **Figure 12** where you may search for specific Medicare Encounter Data errors. To perform an Error Code search, key the Error Code into the text box and click **Search**.

Error codes can be returned from the response files previously discussed.



Figure 12 – Error Code Search Page

When a successful search is performed, the results will appear as shown in **Figure 13**.

# EDFS

Encounter Data Front-end System

[Contact](#) | [Site Map](#) | [Accessibility Statement](#)  
 Search [? Help](#)

---

Home
Mailbox
Upload File
Code Search
Help
News & Updates

**Welcome back SH9999!**  
[ [Logout](#) ]

**Get Assistance**

- [▶ Site User Guide](#)
- [▶ On-line Help](#)
- [▶ FAQs](#)
- [▶ Documentation](#)
- [▶ Accessibility Statement](#)
- [▶ Contact Us](#)

**Latest News & Updates**

No News Found

### Error Code Search Results

[? Get Help On This Section](#)

<b>Code</b>	131
<b>Code Type</b>	CLAIM ADJUSTMENT REASON CODES
<b>Begin Date</b>	19970228
<b>End Date</b>	
<b>Definition</b>	Claim specific negotiated discount.

**View Full Listings**

- [CLAIM ADJUSTMENT REASON CODES](#) < current chosen listing
- [HEALTH CARE SERVICES DECISION REASON CODES](#)
- [PROVIDER TAXONOMY](#)
- [REMITTANCE ADVICE REMARK CODES](#)
- [CLAIM STATUS CATEGORY CODES](#)
- [CLAIM STATUS CODES](#)
- [INTERCHANGE ACKNOWLEDGEMENT CODES](#)

New Search

---

[\[ Home | Mailbox | Upload File | Code Search | Help | News & Updates \]](#)

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Figure 13 – Successful Error Code Search

## GET ASSISTANCE

There are several types of assistance available in the **Get Assistance** area of the EDFES home page (as shown in **Figure 14**).



**Figure 14 – Documents Page**

- The **Documentation** menu item (as shown in **Figure 14**) located beneath **Get Assistance** provides EDFES support documents such as the EDFES Record Layout. Updates to this page are captured on the “**News & Updates**” page (see Figure 2).
- The **Frequently Asked Questions (FAQs)** menu option provides a list of frequently asked questions pertaining to the EDFES.
- The **On-line Help** menu option provides various help topics for the EDFES, the on-line version of this document.
- The **Contact Us** menu option provides contact information for the CSSC Help Desk.

## CONNECT USING SFTP

### SFTP Application Software

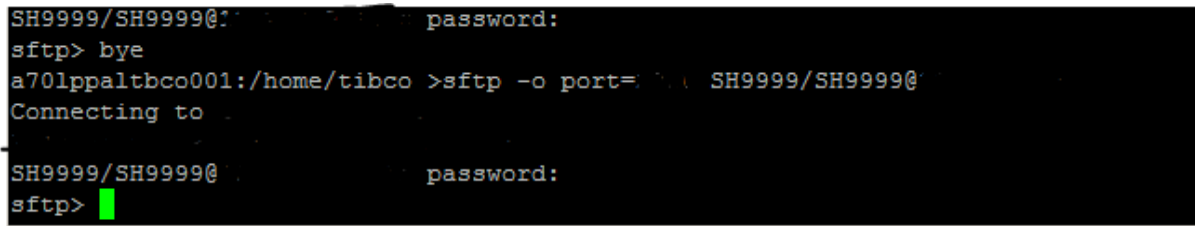
SFTP is a program in UNIX shell interface. For demonstration purposes, the figures in this section are examples of a UNIX client with a user ID ENH9999. Please reference UNIX client documentation.

### Connect to Palmetto GBA using SFTP

The **PORT ID** must equal: **22** and the **HOST ID** has not changed. For information regarding the HOST ID, please contact CSSC Operations at 877-534-CSSC. Consult with your Network Service Provider when utilizing SFTP.

Customers will be required to enter the submitter id and password issued to them by Palmetto GBA. The CSSC will assign a Submitter ID and an original password. If your password is misplaced or becomes compromised, you must contact the CSSC Help Line at (877) 534-CSSC.

The “userid/userid” format should be used when entering the submitter ID. Once connected via SFTP, the customer will be prompted for a password. Current passwords will be transferred to the new application.



```
SH9999/SH9999@: password:
sftp> bye
a70lppalbtco001:/home/tibco >sftp -o port=22 SH9999/SH9999@
Connecting to
SH9999/SH9999@ password:
sftp>
```

Figure 15 – SFTP Screen Shot #1

The “ls” command will list the “inbox” and “outbox”. The inbox will house reports such as the *Error Summary and Transaction Validation*. The outbox is used for the submission of Medicare Encounter Data files. Follow the steps outlined below for data submissions and report retrievals.

## Sending Files

At the sftp> command prompt type: **cd /outbox/EZComm/BC/1.0/Notify**. To display the current working directory, type the command **pwd**, as shown in **Figure 16** below.

```
sftp>
sftp>
sftp> cd /outbox/EZComm/BC/1.0/Notify
sftp> pwd
Remote working directory: /outbox/EZComm/BC/1.0/Notify
sftp>
```

Figure 16 – SFTP Screen Shot #2

Once in the outbox/EZComm/BC/1.0/Notify directory, using the “put” command, enter the file name to upload. For example: **put ENH9999\***. The file upload will display and the sftp> prompt will appear once the upload is complete (See **Figure 17**).

```
sftp> ls
sftp> put SH9999*
Uploading SH9999.Jun25.T114054408.0010871 to /outbox/B2B-
X12/EDI/Inbound/Interchange/SH9999.Jun25.T114054408.0010871
SH9999.Jun25.T114054408.0010871 100% 1096 0.4KB/s 00:03
Uploading SH9999.Jun25.T114119776.005844 to /outbox/B2B-
X12/EDI/Inbound/Interchagne/SH9999.Jun25.T114119776.005844
SH9999.Jun25.T114119776.005844 100% 1310 1.3KB/s 00:00
sftp>
```

Figure 17 – SFTP Sending File Screen Shot

## Receiving Files

If the connection remains intact following a file upload, you may switch to the inbox directory by typing: **cd /inbox/EZComm/BC/1.0/Notify**, as shown in **Figure 18**.

```
sftp>
sftp>
sftp>
sftp>
sftp>
sftp> cd /inbox/EZComm/BC/1.0/Notify
sftp> pwd
Remote working directory: /inbox/EZComm/BC/1.0/Notify
sftp>
```

Figure 18 – SFTP Receiving File Screen Shot

Once in the inbox/EZComm/BC/1.0/Notify directory, using the “get” command enter the file name to download. For example: **get \*.\***. The screen will display the file being downloaded and the sftp> prompt will appear once the download is complete.



## HELPFUL HINTS

- By zipping upload files in a PK-ZIP 14+ compatible format the upload time can be decreased by as much as 90%.
- Do not use the same filename for Medicare Encounter Data files as this may potentially overwrite files that are waiting for processing. Try using sequential names (i.e., FILE1, FILE2, etc.).
- Visit our **News & Updates** page periodically to check for new features, changes or updates.
- Watch for the red alert box on the EDFES web site informing you of any system and/or report distribution problems.
- Visit [www.cssoperations.com](http://www.cssoperations.com) for system status and report distribution messages and alerts.

## Acronyms

Acronym	Literal Translation
<b>CMS</b>	Centers for Medicare & Medicaid Services
<b>CSSC</b>	Customer Service and Support Center
<b>ED</b>	Encounter Data
<b>EDFES</b>	Encounter Data Front-End System (also referred to as EDFS)
<b>ET</b>	Eastern Time
<b>FAQ</b>	Frequently Asked Questions
<b>GBA</b>	Government Benefit Administrators
<b>ID</b>	Identification Data
<b>IP</b>	Internet Protocol
<b>LLC</b>	Limited Liability Corporation
<b>NSV</b>	Network Service Vendor
<b>SFTP</b>	Secure File Transfer Protocol
<b>URL</b>	Uniform Resource Locator

**Table 1: Acronyms**

## Record of Change

Version Number	Date	Author/Owner	Description of Change
1.0	2011	Ray Dailey	Initial Creation
2.0	2015	Edmond Melkomian Brooke Moore Gladys Brown	Revisions for TIBCO

**Table 2: Record of Change**