Preparing for HIPAA Version 5010 Checklist
Electronic Data Interchange Transactions

The health care industry is preparing to implement the Health Insurance Portability and Accountability Act (HIPAA) 5010 standard transactions, and Anthem Blue Cross and Blue Shield (Anthem) is working to help ease the transition for your office or facility. Effective January 1, 2012, the switch from the current 4010 standard to the new HIPAA 5010 version requires changes to the claim information currently being submitted. We hope you find the checklist below helpful, as you evaluate your 5010 readiness and compliance. By preparing in advance for HIPAA 5010 version, you can help minimize potential disruptions in your business operations.

☐ Determine connectivity
  ✓ Direct to Payer
  ✓ Clearinghouse
  ✓ Practice Management (PM) Software to Clearinghouse

☐ Engage with vendors, clearinghouses and payers as appropriate

☐ Establish support contacts

☐ If you submit directly to Anthem:
  ✓ Identify the differences between versions 4010A1 and 5010, and determine what applications, systems and operating protocols need to change. This should be complete or under way now.
  ✓ Determine impact of Version 5010 changes to data reporting requirements, workflow modifications, staff training needs and testing.
  ✓ Implement changes to systems and protocols; test the changes as appropriate.
  ✓ Prepare test files using valid provider, member and claim information.
  ✓ Schedule and complete tests with your external trading partners (such as Anthem and other health insurance payers).
  ✓ Transition to the 5010 transactions, including any Errata, by the compliance date of January 1, 2012.

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☐ If you submit through a vendor, billing service or clearinghouse:

✓ Evaluate:
  ➢ Submission impacts
  ➢ New data requirements
  ➢ Staff training needs
  ➢ Timelines
  ➢ Testing criteria

✓ Review your contracts to determine what terms apply when major federally mandated data set changes must be made.

✓ Determine impact of Version 5010 changes to data reporting requirement changes, workflow modifications, staff training needs and testing with your software/PM vendor, service and/or clearinghouse.

✓ Prepare to test using valid provider, member and claim information.

✓ Your vendor, billing service, or clearinghouse should contact you about preparations being made to support your 5010 business requirements for the January 1, 2012, compliance date.