

**Updated:** August 23, 2012

## **EDEX CLIENT**

The EDEX Client is the “end user” of the data requested through EDEX. They are the initiator of requests for information and the ultimate recipient of responses from the EAMS database. The EDEX Client has the responsibilities outlined in the EDEX Client agreement.

DWC will not assign multiple EDEX Client ID’s to a single individual or company location. For instance, if a doctor’s office, operating out of one location, has multiple staff using EDEX services, only one EDEX Client ID will be issued for that doctor. If there is a need to keep track of the individual staff that is performing EDEX services on behalf of the doctor for billing purposes, etc., you will need to work with your EDEX software provider to provide that functionality. However, if there are multiple doctor’s operating out of a single office, each doctor for whom the EDEX transaction is being issued can and should have an EDEX Client ID that uniquely identifies that doctor.

**PREREQUISITES:** In order to perform EDEX functions, an EDEX Client must have EDEX software provided by a certified EDEX software vendor and an EDEX Service Provider (Subscriber) account or go through someone who offers such services.

## **EDEX SERVICE PROVIDER (formerly known as SUBSCRIBER)**

The EDEX Service Provider account is the interface between the EDEX Client and EDEX. It is through the service provider account that EDEX receives the electronic transactions from Clients and returns the responses. This is also the entity that receives invoices for EDEX transactions each quarter.

Only one service provider is typically assigned to a given EDEX client or group of clients. A service provider may have one or more clients. A service provider can have only one EDEX connectivity method and only one location to send and receive data from at any one point in time. If a service provider has multiple locations that they wish to perform EDEX services from, then they must apply for an additional account for each location as the account information is used to determine where to route the output. Identifying and signing up potential clients, is the responsibility of the EDEX Service Provider.

Additionally, it is the responsibility of the EDEX service provider to receive and review the EDEX Client applications from each of the clients utilizing their services to insure that the application(s) are complete and accurate. The EDEX service provider must then submit the completed application(s) to DWC EDEX Administration for final review and approval. Approved applications will be mailed to the client using the mailing address provided on the application. A copy of the approved application will also be mailed to the EDEX service provider who submitted the application.

PREREQUISITES: An EDEX service provider must have at least one EDEX Client ID and EDEX certified software in order to perform EDEX functions.

## **EDEX SOFTWARE VENDOR**

The Division of Workers' Compensation has developed a number of application programming interfaces (API's) that describe the required format for submitting transactions through EDEX as well as the format of responses from EDEX. Certified EDEX software vendors have gone through a certification process with DWC to assure that their software can correctly interface with EDEX. If you are a software developer and are interested in developing an EDEX application, you will need to study the EDEX specifications document and determine whether it is an effort you are willing to undertake.

Once a software vendor has passed DWC EDEX certification, they may develop specific application features that provide a wide range of case management functionality to meet a potential client's needs. An EDEX Client would either select an EDEX software vendor whose product best matches their workers' compensation data management requirements, or optionally, develop the software themselves using the published DWC EDEX proprietary transactions (API templates) referenced above.

Not all EDEX software vendors elect to market and/or sell their software. Some choose to develop the software for their own proprietary use while others develop software for the purpose of marketing and selling the product for others to use.

The California Division of Workers' Compensation (DWC) does not warrant or guarantee your satisfaction with a certified vendor's services. The certification process is solely for the purpose of ensuring that the vendor's software conforms to DWC minimal functional requirements with respect to data exchange services. Data quality and integrity are the responsibility of each EDEX software vendor.

Additionally, it is the responsibility of the EDEX software provider to receive and review both the EDEX Service Provider (formerly Subscriber) and EDEX Client applications from each of the service providers utilizing their software to insure that the application(s) are complete and accurate prior to submission to DWC. The EDEX software provider must then submit the completed application(s) to DWC EDEX Administration for final review and approval. Approved applications will be mailed to the subscriber and/or client using the mailing address provided on the application.

PREREQUISITES: An EDEX Software Vendor cannot perform EDEX functions without an EDEX Service Provider (Subscriber) account and at least one EDEX Client ID. The software alone cannot perform EDEX services.

## **EDEX CONNECTIVITY OPTIONS**

There are two methods for connecting to DWC EDEX Services, Secure File Transfer (SFT) and Value-Added Network (VAN) services. Typically, the EDEX software vendor determines which one of the two mechanisms their software package will use to connect to EDEX.

### **Secure File Transfer (SFT)**

This solution provides EDEX Service Providers (formerly Subscribers) with an IP-based mechanism for sending and receiving data via an encrypted connection. Each EDEX Service Provider (Subscriber) using SFT is assigned an SFT userid and password and SSH public key. The password allows for access to your mailbox via a web browser, while the SSH public key allows for a scripted (batch) connection to facilitate automation of the upload and download of EDEX transactions.

While there are no data transfer charges associated with this solution, there is a minimum, flat-rate, annual charge of \$500 for each SFT account. This charge is to cover the initial setup of the account and ongoing monthly service charges levied by the State's data center services.

The \$500 annual charge will be waived the following year for each year in which the EDEX service provider performs a minimum of \$5,000 in invoiced transactions.

### **Value-Added Network (VAN)**

This solution requires that the EDEX software vendor wishing to use VAN services as the mechanism to interface with EDEX to initially establish themselves as a "re-marketer" of the VAN services. Typically, the EDEX software vendor will bundle the proprietary telecommunications software necessary to interface with VAN into their software product. They will also arrange to be a re-marketer of the VAN services. This will allow them to set up VAN accounts for each EDEX Service Provider (Subscriber) who purchases their software and it is the responsibility of the EDEX software vendor to act as the agent of the VAN.

The advantage of this specific solution is that it allows for complete privacy of each transaction. The data is exchanged between DWC and the Service Provider (Subscriber) without anyone in the middle having access to the data. Only DWC and the individual subscriber/service provider will have visibility to the case-related, EDEX data. However, there is a charge levied by the VAN for the movement of data through their store-and-forward service. These charges are typically passed on to the EDEX subscriber/service provider by the VAN re-marketer (likely the EDEX software vendor).

GXS is the current vendor providing VAN services to the State's datacenter. If you are interested in pursuing this alternative, then the DWC EDEX Administration staff will provide you with contact information to obtain a full explanation of how to setup and become a re-marketer of GXS VAN services.

This method is most desirable for those EDEX Subscribers/service providers that have less than 25,000 EDEX transactions per year or who need the utmost privacy without the introduction of a middle-person to broker the transaction.

## FAQ

**QUESTION:** Can an EDEX Service Provider submit inquiries to EDEX services without clients?

**ANSWER:** No. Only EDEX Clients can perform EDEX services. The Service Provider is the “middle man” that brokers the transaction.

**QUESTION:** Can an EDEX Client set up communication with EDEX directly?

**ANSWER:** No. The EDEX Client would need to either apply for an EDEX Service Provider account, or work through an existing EDEX Service Provider.

**QUESTION:** I am a doctor in El Segundo and I have three clerical staff people working out of a single office and I would like for each person to be able to perform EDEX services. Can I get an EDEX Client ID for each of these staff members?

**ANSWER:** No. Only one EDEX client ID is issued per business entity or sole proprietorship, per location. That client ID must be the “end user” of the information. In this case, the doctor is the end user. The doctor’s staff are his/her agents and do not get their own EDEX Client ID’s.

**QUESTION:** What’s the difference between an EDEX service provider and an EDEX software vendor?

**ANSWER:** An EDEX “service provider” has software and EDEX connectivity at their site. In this configuration, the EDEX client will most often need only a computer with an internet browser and an internet connection to connect to the EDEX service provider.

An EDEX “software vendor” will provide you with software that you install on your computer. The software will provide the direct connectivity to EDEX. We encourage you to evaluate your needs and contact both software vendors and service providers to find the exact solution that works best for your business needs. There are different sizes to fit different needs and pocket books.

**QUESTION:** I have software that has been approved for EDEX. Now what?

**ANSWER:** You need to find companies that need access to adjudicated workers’ compensation case information. Typically, these are regular workers’ compensation case participants, e.g. medical service providers and others who may have a need to file liens, workers’ compensation attorneys or lawfirms and workers’ compensation claims administrators, etc. Those entities that have a low volume of workers’ compensation cases can find other ways in which to obtain case information. EDEX is typically, but not always, used by “regular” participants in the workers’ compensation process. Depending on how well you have designed your software, the functionality you offer and the price you charge will largely determine a potential client’s interest in your solution. Once you have clients, you will need an EDEX subscription/service provider account and at least one EDEX Client along with an EDEX connectivity option in order to send and receive data to and from EDEX.

**QUESTION:** I want to develop software for EDEX. How do I choose my connectivity option?

**ANSWER:** The decision largely depends on volume. If you have fairly significant volume (>25,000 EDEX transactions per year, you may want to consider the SFT filing option. This option requires an annual fee in addition to the DWC transaction charges.

If your potential customers require control of their own data and your software is client-based, you may want to consider becoming a reseller of Value-Added Network (VAN) services. DWC currently uses GXS for its value-added network. In addition, if your customers are relatively small volume filers, you may also want to consider the VAN approach as this is a pay-as-you-go solution. The cost is based on the volume of data exchanged by each customer.