Provincial Health Services Authority
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EDI Process Overview

Purpose

This is a step by step overview to act as a guide to assist vendors complete the review of PHSA Supply Chain (**PHSA SC**) EDI requirements.

Background

PHSA SC has a mandate to maximize efficiencies gained by an EDI partnership, and to only accept compliant documents that will cleanly integrate with ordering systems province wide. To this end, PHSA SC has created **a single EDI standard compatible with systems province wide**, and will provide a set of specifications that define the parameters from which PHSA SC can engage in the use of EDI with trading partners. PHSA SC will also share documents outlining general rules and guidelines that help us make informed and relevant decisions about the implementation and ongoing EDI with trading partners.

Scope

PHSA Supply Chain deals with all of procurement for the following Health Authorities in the Province of British Columbia.

- Fraser Health Authority (**FHA**)
- Interior Health Authority (**IHA**)
- Northern Health authority (**NHA**)
- Providence Health Care (**PHC**)
- Provincial Health Services Authority (**PHSA**)
- Vancouver Coastal Heath Authority (**VCH**)
- Vancouver Island Health Authority (**VIHA**)

PHSA's objective is to onboard the compliant documents of the following 5 transaction types on EDI to benefit both, the trading partner and PHSA.

- 810
- 855
- 856
- 832
- 850

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Documents provided by PHSA

The following documents are provided by PHSA SC for the purposes of EDI engagement:

1. **Specification Review Feedback Template**
   - An Excel workbook listing the requirements for each transaction, instructions used as a consolidated document to communicate and track progress
2. **PHSA SC EDI guidelines**
   - An overview of the EDI Engagement project, background, guidelines and a list of specific notes for each EDI transaction type
3. **PHSA EDI Intake Questionnaire**
   - An assessment of your organization's EDI readiness
4. **810 Specification Detail**
   - This document will detail the requirements for segments and elements specific to the 810 transaction.
5. **856 Specification Detail**
   - This document will detail the requirements for segments and elements specific to the 856 transaction.
6. **832 Specification Detail**
   - This document will detail the requirements for segments and elements specific to the 832 transaction.
7. **855 Specification Detail**
   - This document will detail the requirements for segments and elements specific to the 855 transaction.
8. **850 Specification Detail**
   - This document will detail the requirements for segments and elements specific to the 850 transaction.

Approach

To allow all parties involved to make informed decisions about the implementation of EDI before engaging in work that might be unnecessary, unwanted, or incorrect, PHSA SC has broken down the engagement process into 2 phases – A specification review phase to track and confirm the supplier's EDI capabilities are compliant with PHSA SC standards and an implementation phase to begin the agreed upon work.

1. Read **all** the documents provided by PHSA
   a. PHSA SC EDI guidelines for process overview
      - Pay close attention to specific details
   b. Review EDI specifications for each document type and its corresponding tab in the workbook

Please note: While your organization may be transmitting the requested documents types to EDI partners today, it's crucial that any incoming documents will integrate with the varied and unique ordering systems used across the Province of British Columbia. The PHSA SC EDI Engagement team strongly recommends reviewing the guidelines and specification documents in full – even if the document type is being sent to BC Health Authorities today.

2. Proceed to **specification review**.
   PHSA estimates this review will take between 20 to 40 hours for EDI technical staff and about 5 to 10 hours for a business representative. The review will be considered complete when all mandatory elements and segments can be supplied by the vendor. PHSA SC will not start implementation until after the specification review is complete.

   a. Each tab on the workbook corresponds to an EDI document type in scope
   b. Please be sure to document and track all progress and questions using the **Specification Feedback Template** - a single unified location will allow better communication.
   c. Review the **Specification Feedback Template** and determine whether your system can provide each segment and element, as indicated in more detail in the **Specification Detail**.
      - PHSA is interested in whether compliance can be met (Future state), not whether current documents comply with our specifications today.
      - If complying will require considerable time or resources, please note that as a Yes on the **Specification Feedback Template** with details.
   d. Requirements for each element are identified by a single letter to indicate whether the element is **M**andatory, **R**ecommended or **O**ptional
   e. On the Review Specification Feedback Template, note any findings with a single letter under **column G** - **Y**es/**N**o/**M**aybe. All mandatory attributes must have a 'Yes' in order to proceed with Implementation - elements indicated as Maybe will be presumed to be a No for the purposes of moving onto implementation.
   f. Note any questions about an element and its requirements in **column D** corresponding to the element in question.
   g. Once Specification Review Feedback is completed for all document types, send the completed file to PhsaEdiEngagement@phsa.ca
   h. For any vendor inquiries and comments, PHSA SC will fill in the responses under the comments section and return the updated workbook for the supplier's team to review.
   i. Once PHSA is satisfied that the vendor can comply with PHSA SC specifications, the PHSA SC EDI Engagement team will book a meeting with the vendor's implementation team. It is important all relevant stakeholders must attend this meeting and includes technical staff that will be doing implementation tasks on the vendor's side. Implementation steps and timelines will be discussed at this meeting.

3. Implementation phase

   a. Implementation starts with 832 catalogue updates. The reason for this is simple – the key to clean automated transactions of every document type is by synchronizing data between sender and receiver. Match Exceptions are mainly caused by price discrepancies, and price discrepancies are best addressed through catalogue updates.

PHSA SC has many ongoing initiatives that improve our data integrity, but catalogue updates remain the most effective way to update item data in our ERP systems.

b. PHSA SC assumes a provincial pricing model is in place, and thusly will require a single 832 file for the province. This same file will be used to update the price in each system. If there are concerns around non-alignment of prices across Health Authorities, please pull the pricing data and send it to PHSA. Please include the following data points : Vendor Part Number, Contract Start/End date, Price, GTIN (if possible), Unit of Purchase, Manufacturer, Manufacturer Part Number and Customer Name

The 832 file should contain all items and units of measure that can be purchased with contract pricing where an item is on contract and PHSA specific pricing where available.[1]

The following are NOT acceptable alternatives for the above options for a complete 832 file:

- A catalogue containing only items that are on contract or price agreement
- A catalogue containing only items that have undergone recent updates and changes since the last catalogue transmission

Associated benefits and concerns: Why PHSA requires a complete catalogue

1. PHSA SC uses 5 ERP systems – constant changes to each ERP require an entire catalogue and not just deltas to maintain synchronized pricing
2. Significant off contract spend. Price exceptions are mostly driven by off contract spend.
3. A complete 832 offering helps reduce price match exceptions significantly, by as much as 90%.
4. Our case studies and proof of concepts show that to get most value, PHSA requires the entire catalogue
5. 832s also help provide visibility to our clinical end users into the range of products available from a vendor, identify substitutes, support new initiatives
6. A complete catalogue will help us clean our internal data such as part numbers, units and tax information to ensure they are synchronized with our partners.
7. PHSA only uses 832s to update pricing for items already listed in our ERP systems and not automatically create new item records
8. PHSA does not expect our vendors to maintain PHSA specific price on thousands of unordered products, only to use PHSA specific price when available

c. Once 832s are fully onboarded and after 2-3 catalogues from the vendor have been successfully processed, PHSA SC will consider pricing data to be synchronized enough to go live with other document types.

d. The vendor will roll out 810s and 855s at FHA for a burn in period of two months before expanding them to the rest of the Health Authorities one by one. The determination when to go live is made solely by PHSA supply chain.

[1] If file size and EDI transmission costs are a concern, PHSA Supply Chain has partnered with a separate VAN exclusively for the transmission of 832 files – monthly 832 transmission fees for this alternative will be picked up by PHSA Supply Chain

e. During these implementation steps, 850 PO Dispatch will be discussed.
   - If the supplier isn't receiving 850 Purchase Orders province wide, the infrastructure to transmit them will be created as much of this is shared with the infrastructure to accept 855s and 810s.
   - A comprehensive review of shipping locations and account codes will be done.