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Introduction

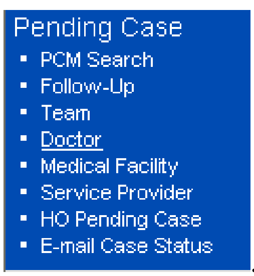
DataXchange Online - Service Provider Interface (SPI) is a SmartOffice service that enables a General Agency and a Service Provider (i.e., Portamedic) to exchange data using a secure connection through the DataXchange Server. The service enables users to electronically transmit Report Order requests to the service provider. In response, the service provider sends the General Agency a Report Status for each requirement. A background service automatically inserts the requirement status into SmartOffice notes.

- SPI's electronic means of receiving statuses from a service provider frees resources for the General Agency instead of dedicating employees to search for statuses on ordered requirements through phone calls or letters.
- DataXchange Online – Service Provider Interface currently supports the NAILBA 800 (Report Order) and NAILBA 850 (Report Status) formats.
- To use DataXchange Online – Service Provider Interface, users must first register with DXO 1.0.

Registering for DataXchange Online

Users must phone their E-Z Data customer service representative to register for DataXchange Online services. E-Z Data will assign the user a mailbox on the DataXchange (DX) Server. Users already signed up with the DataXchange Online – Pending Case Download service will be able to use the service provider interface in SmartOffice.

The same mailbox used for pending case downloads is used for the status files received from the service provider. The files are distributed by the DX Server to the same mailbox folder with different sub-folders.



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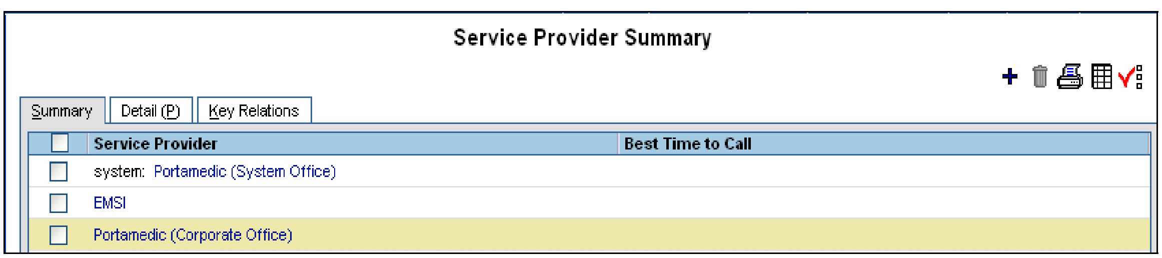
Adding a Job Agent

The Service Provider Interface starts with SmartOffice sending a Report Status (NAILBA 800) to the Service Provider. In order to send a file to the Service Provider through the DataXchange Server, create a job agent called DataXchange Request in either the system or current office. Create a job agent in the system office if the service is being shared by multiple offices. Add a record exactly how it appears in the image below. The text is case sensitive.

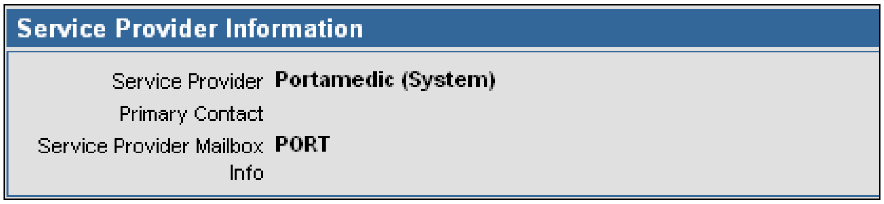
Adding a Service Provider

Prior to using the service provider interface, a SmartOffice Admin user must create a service provider record.

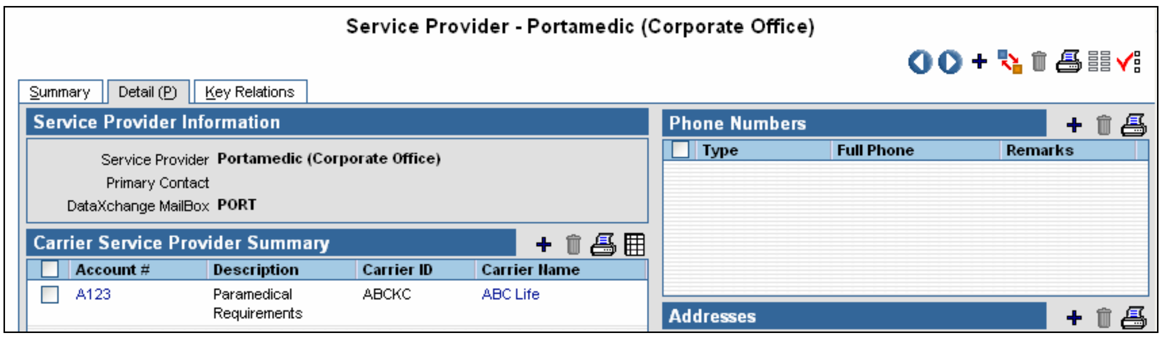
1. The Service Provider can be set up in several ways:
   - From the System Office: All offices can use the carrier accounts with the service provider in the system office.
   - From a Parent Office: Offices under the Enterprise View hierarchy can use the carrier accounts with the service provider in the parent office.
   - From a Current Office: Carrier accounts with the service provider can only be used by the current office.
2. To add a Service Provider, from the **Pending Case** side menu, select the **Service Provider** sub-menu. Click the **Add** button from the Service Provider Summary to enter detail information.



3. The Service Provider Name and the Service Provider Mailbox are mandatory fields. The record cannot be saved without this information. For the service provider Portamedic, the mailbox value is **PORT** (in uppercase).



4. To create accounts for carriers with Portamedic, from the Carrier Service Provider Summary section toolbar, click the **Add** button. Enter the Carrier and its Carrier ID, Account #, a brief Description of the account and then click the **Save** button.



File Content

The recognized Order Types in the NAILBA 800 file are New, Cancel and Completed.

- "I" for new means an initial request.
- "C" for cancel means that the request is no longer needed.
- "P" for completed means that the agency has been notified that the request has been completed.

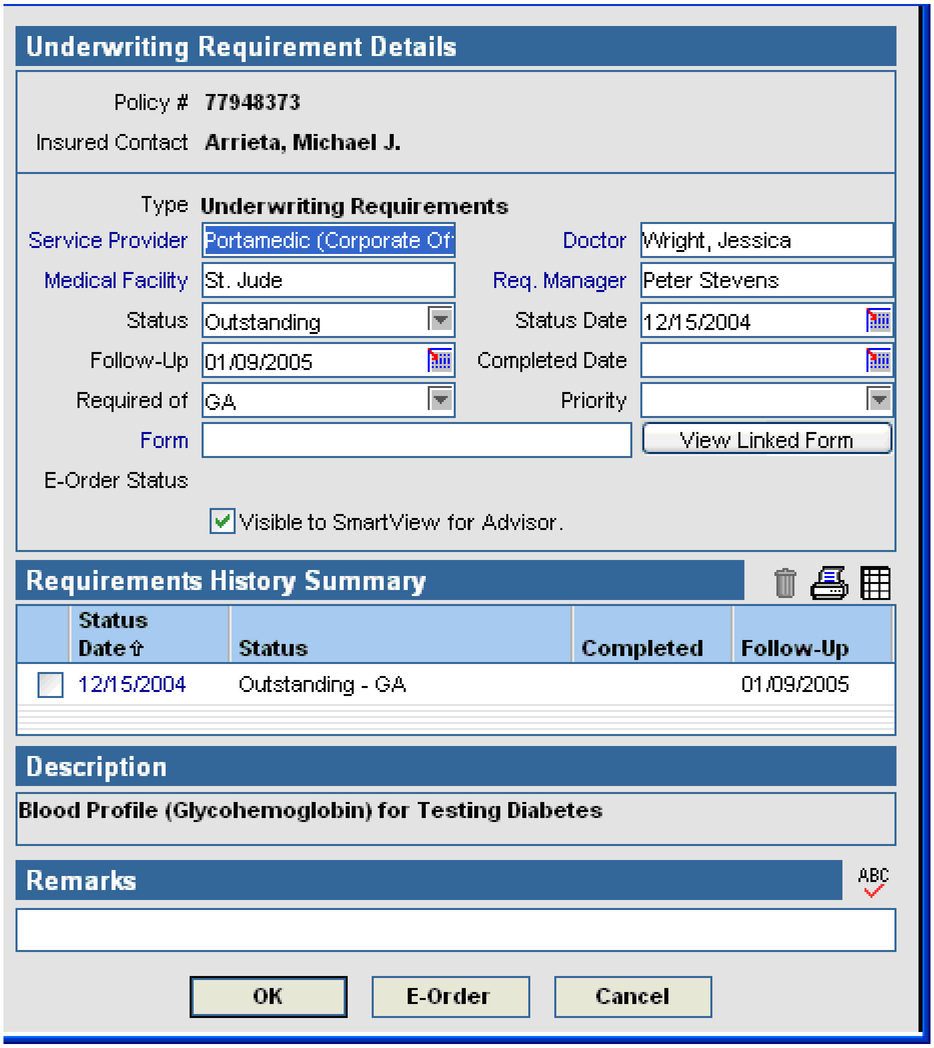
The Underwriting Requirements could be of any type but while sending the electronic order, SmartOffice supports the APS, MVR, IR and PARA types.

Sending a Service Provider Request

There are 2 ways of sending a request or an electronic order (E-Order):

- As a single request
- As multiple requests

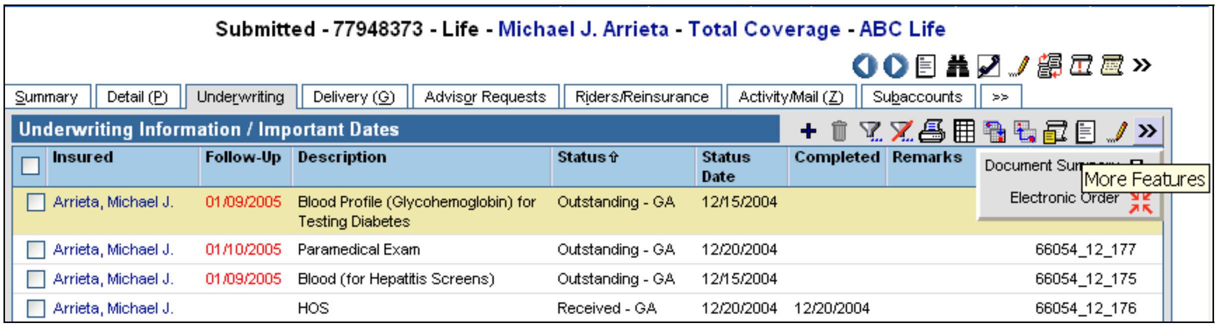
An E-Order can be sent directly from the Underwriting Requirement Details dialog box.



If required elements needed by the service provider are missing, SPI will display a warning message to ensure that the information for the missing elements is provided. A user may prefer to enter the required elements and then send all of the underwriting requirements for the case to the service provider.

Perform the following steps:

1. Click the **Tag All** option.
2. From the Underwriting Information / Important Dates toolbar, click the **More Features** button and then select **Electronic Order**.



Job Queue

The E-Order requests are processed as a job in the SmartOffice job queue. Jobs with a pending status are found in the Active Jobs spreadsheet. Those with a status of Done are in the Inactive Jobs spreadsheet. The ‘NAILBA 800 File Uploaded Successfully’ message that displays in the Job Detail Information window confirms that the request has been sent to the DX Server. Portamedic uses the service provider mailbox PORT to retrieve report orders.

Cancelled Requests

SmartOffice transmits a cancel transaction to the service provider if the user changes the Status of a case to any of the following:

- Waived
- Cancelled
- Closed
- Deleted
- Not taken
- Withdrawn

With the above case status change, the policy stage of the case also changes. If the user changes the Policy Stage of a case to Inactive, the system transmits a cancel transaction to the service provider.

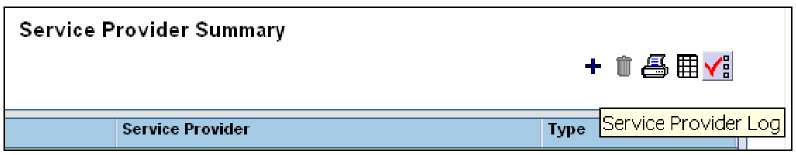
Receiving a Service Provider Report Status

From the NAILBA 800 request received from the agency user, the service provider (e.g., Portamedic) creates a NAILBA 850 report status file. Portamedic copies this file to another mailbox on the DX Server that serves as the repository for 850 report status files from Portamedic. From this Portamedic 850 mailbox, file delivery processes in the DX Server distribute the file to the user's mailbox. Both the NAILBA 800 and NAILBA 850 files contain the mailbox information which tells the process where to deliver the file.
SmartOffice reads and processes the report status file from the user mailbox at specified time intervals and automatically updates SmartPad requirement notes from a background service. Updates happen automatically with the background service; no user intervention is required.

Both the NAILBA 800 and NAILBA 850 files contain a unique identifier (the Quoteback #) that tells SmartOffice which requirement is to be updated.

Service Provider Logs

From the **Pending Case** side menu, select **Service Provider**, and then select the **Service Provider Log** button in the Service Provider Summary to display a report of electronic order status logs.



From the log, the status of electronic order requests can be tracked. The E-Order statuses are:

- Cancelled
- Error
- Received
- Reviewed
- Transmitted

From the Service Provider Request Log Summary, select any record to find the details of the service provider request. To easily correct errors (e.g., missing doctor and/or insured required information) click the **PCM** button to open the Pending Case Underwriting tab. Users sending service provider requests and expecting to receive statuses on the orders will need to run the Service Provider Request Logs to check for errors.
Once an 850 report status has been received, the E-Order status on a requirement is automatically updated to Received. The log is linked to requirements and reflects current E-Order statuses.

Click the **Mark Reviewed** button to update a Received electronic status to Reviewed. Requirements remain on the Log Request Status spreadsheet until marked as Reviewed. Note that a request for the same requirement can only be transmitted once.