

## EDI Implementation Timeline

The full EDI Implementation process can take four to six weeks; however, Ameriflex can accelerate this process in some cases. Mid-year implementations can take six to eight weeks due to additional review requirements for account balances.

### 1 Notice to Begin EDI: CLIENT RESPONSIBILITY

The vendor (party responsible for building/sending the files) should email [edisupportteam@myameriflex.com](mailto:edisupportteam@myameriflex.com) to begin EDI implementation. **This request should include:**

- Group name
- Segment of business:
  - Flex (all or specific plan types)
  - COBRA
- If the group plans to send optional file types:
  - Dependent information (ID files)
  - Payroll deposits (IH files)

### 3 Test Files Sent to Ameriflex SFTP: VENDOR RESPONSIBILITY

The vendor will send test files to Ameriflex in the format laid out by the specs.

### 5 Compare Data in the File Against Ameriflex System: AMERIFLEX AND CLIENT RESPONSIBILITY

Ameriflex will review the data sent in the file against the data in Ameriflex's system. If there are discrepancies, we will ask the vendor to get the group's contact involved to confirm whose system is correct. If the vendor/client needs assistance, we will schedule a phone call.

**(2-3 business days per test)**

### 7 Vendor Confirms We Can Move the Group Into Production: VENDOR RESPONSIBILITY

The vendor will confirm files are ready for production. The vendor should provide the date for the first file, what day the files will be sent, a contact for the vendor, and a contact(s) from the group.

### 2 Ameriflex EDI Welcome Email: AMERIFLEX RESPONSIBILITY

An EDI Specialist will send you a welcome email including: SFTP, spec, and group specific information.

**(1 business day)**

### 4 Test File Format and Provide Feedback: AMERIFLEX RESPONSIBILITY

Ameriflex will test the files to ensure all fields are formatted correctly. If there are errors, Ameriflex will email the vendor explaining what corrections need to be made for the next file. If the vendor/client needs assistance, we will set a phone call.

**(2-3 business days per test)**

### 6 Ready For Production: AMERIFLEX RESPONSIBILITY

Once all test files are formatted correctly and all data is correct the testing process is complete. Ameriflex will confirm what day the first file will be sent, who our vendor contact will be, and who will receive the EDI File Processing/Error Reports.

### 8 Group Moved Into Production: AMERIFLEX RESPONSIBILITY

Once confirmation is received, Ameriflex will move the group into production and monitor the first file running in production. The File Processing/Error Reports will then be monitored by our Operations team. If there are any errors, our team will reach out to the vendor or group for corrections.

