

TCS Trading Partner Survey

Survey of Trading Partners

Name of Trading Partner: _____

1. The agreement includes provisions that address the exchange of information?
- Yes. Continue with question 2.
- No. Trading partner agreement not needed.
2. Does the agreement specify, either directly or by reference to other documents, how information should be transmitted and the data elements that are to be transmitted between the practice and the organization?

- Yes. Continue with question 3.
- No. Trading partner agreement not needed.

3. What transactions will be conducted with the organization? (Check all that apply.)

- Claims (including coordination of benefits)
- Claims status inquiries
- Remittance and electronic funds transfer
- Eligibility inquiries
- Referral authorization
- Health plan enrollment
- Premium payment

If any of the above transactions are checked, the trading partner agreement must be modified to specify that transactions will comply with the federal standards for electronic transactions.

Continue with questions 4 through 8 to identify specific issues that must be addressed with the trading partner.

4. Does the agreement provide definitions of data elements or guidelines for the use of any data elements in transactions?
- Yes. Continue with question 5.
- No. The agreement needs to reference the relevant federal transaction standards. Continue with question 6.

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5. If the agreement *does* define or prescribe how to use data elements, do the requirements conflict with the relevant HIPAA transaction standard implementation guide?
- Yes. The agreement must be modified so as not to alter the definition or usage of HIPAA transaction data elements. Continue with question 6.
 - No. The agreement should reference the relevant federal transaction standards. Continue with question 6.
6. Does the agreement include specific instructions for coding data elements, for example data elements related to coding medical procedures?
- Yes. Continue with question 7.
 - No. The agreement needs to reference the relevant federal transaction standard code sets.
7. If the agreement *does* directly or indirectly include coding instructions, do these coding instructions result in the use of codes that are not part of the HIPAA code sets?
- Yes. The agreement must be modified to require the use of HIPAA code sets. Alternative instructions for coding the specified elements should be negotiated.
 - No. The agreement should reference the relevant federal transaction standards.

Briefly summarize changes needed in agreement:
