



EDI COMPANION GUIDE

Real Time Eligibility and Benefits (270/271)
and
Real Time Claim Status (276/277)

Revised 5/29/2025

The purpose of this Companion Guide is to outline format and content requirements for the Real Time exchange of 270/271 Eligibility and 276/277 Claim Status transaction messages with Office Ally. This guide does not include any payer-specific data elements or transaction requirements. Please refer to the individual payer's specification documents for that level of detail, as they vary from payer to payer.

As defined under HIPAA, documents like this are intended to supplement, not replace, the standard HIPAA X12 Technical Report Type 3 (TR3) and mandated Operating Rules for each transaction set. Transmissions based on this companion guide, used in tandem with v5010 ASC X12N TR3s, are compliant with both ASC X12 syntax and those guides. Information in this guide is not intended to modify the definition, data condition, or use of any data element or segment in these overarching governing rules. This guide does not utilize any code or data values that are not valid in the standard X12 TR3s. It also does not change the meaning or intent of any implementation specifications in the standard TR3s.

This companion guide is intended for Real Time EDI submitters sending X12 270 and X12 276 transactions to Office Ally through one of the available connectivity methods. This guide is not intended for Office Ally portal products.

TABLE OF CONTENTS

Contents

<i>Introduction</i>	<i>4</i>
<i>Disclosure Statement</i>	<i>4</i>
<i>Getting Started</i>	<i>4</i>
<i>Connectivity</i>	<i>5</i>
SOAP Example 270	6
SOAPCurl Example 270	6
SOAP Example 276	7
SOAPCurl Example 276	7
MIME Example 270	8
MIMECurl Example 270	9
MIME Example 276	10
MIMECurl Example 276	11
<i>Transaction Data Requirements</i>	<i>12</i>
Interchange Control Header (ISA) segment.....	12
Interchange Control Trailer (IEA) segment.....	13
Functional Group Header (GS) segment.....	13
Functional Group Trailer (GE) segment	13
<i>Office Ally Error Responses</i>	<i>14</i>
<i>Contact Information.....</i>	<i>15</i>

Introduction

The document describes how ASC X12N TR3s adopted under HIPAA will be implemented and integrated into the services provided by Office Ally. Expectations over and above the information in the TR3s will be detailed here.

Disclosure Statement

Disclosure, distribution, and copying of this guide is permitted, however, changes to items found in this guide may occur at any time without notice. The intended purpose and use of this guide is to provide information in reference to the Eligibility (270/271) and Claim Status (276/277) transaction sets.

Office Ally, Inc. will be referred to as OA throughout this guide.

Getting Started

To get started, you must be an Office Ally customer with an Office Ally account number, and you also need to be set up as a Realtime EDI Submitter with Office Ally.

If you would like to become a customer, please visit www.officeally.com.

To request to be setup as a Realtime EDI Submitter, please send an email to the Realtime Support team at realtime_support@officeally.com and provide your Office Ally account number.

Transactions submitted to OA for real time EDI are required to be in ANSI X12 5010 compatible 270 or 276 EDI formats. All OA Real Time Trading partners are expected to obtain and follow the applicable X12 TR3 documents and mandated Operating Rules for each transaction set you will be exchanging with OA. Additionally, trading partners are expected to have access to the X12 999 TR3 to be able to properly interpret X12 standard errors returned by OA.

- Access to the 270/271, 276/277, and 999 TR3s can be obtained through X12 licensing: <https://x12.org/products/licensing-program>
- HIPAA Mandated Operating Rules can be downloaded from: www.caqh.org

Connectivity

OA supports real-time transaction processing through SOAP WSDL and HTTPS MIME Web services. These transactions must each include a standard envelope for wrapping ASC X12 transaction data.

The following transaction types are supported through these services:

- Eligibility and Benefits Inquiry/Response (270/271)
- Claim status Inquiry/Response (276/277)

All rules defined in the CAQH CORE Operating Rules should be followed for the construction of these envelopes. These are available at: <https://www.caqh.org/sites/default/files/core/phase-ii/policy-rules/Connectivity-Rule-vC220.pdf>

Both formats require the inclusion of a Username and Password which will be supplied upon signing up to be a trading partner with OA. OA's default Receiver ID is "OFFALLY". Sender ID's will be assigned during the Realtime onboarding process.

To ensure online security, OA may require the use and/or exchange of SSL Certificates. In the event a certificate is necessary, OA acts as its own CA (Certification Authority) and upon completion and signing of the Trading Partner Agreement, will provide an SSL Certificate to the Trading Partner. OA typically provides these certificates in P12 or P7B format, unless otherwise requested.

The following endpoints are to be used to connect to OA:

- SOAP: <https://wsd.officeally.com/TransactionService/rtx.svc>
- MIME: <https://wsd.officeally.com/TransactionSite/realtime-request/MIME>

Note: These URLs are only to be used for SOAP or MIME connectivity, they are not intended to be usable website links.

During the Real Time EDI onboarding process, OA will provide the appropriate permission information.

SOAP Example 270

```
<soapenv:Envelope xmlns:soapenv="http://www.w3.org/2003/05/soap-envelope">
  <soapenv:Header>
    <wsse:Security xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
      <wsse:UsernameToken>
        <wsse:Username>USERNAME</wsse:Username>
        <wsse:Password>PASSWORD</wsse:Password>
      </wsse:UsernameToken>
    </wsse:Security>
  </soapenv:Header>
  <soapenv:Body>
    <ns1:COREEnvelopeRealTimeRequest xmlns:ns1="http://www.cagh.org/SOAP/WSDL/CORERule2.2.0.xsd">
      <PayloadType>X12_270_Request_005010X279A1</PayloadType>
      <ProcessingMode>RealTime</ProcessingMode>
      <PayloadID>f81d4fae-7dec-11d0-a765-00a0c91e6bf6</PayloadID>
      <TimeStamp>CCYY-MM-DDTHH:MM:SSZ</TimeStamp>
      <SenderID>SENDERID</SenderID>
      <ReceiverID>OFFALLY</ReceiverID>
      <CORERuleVersion>2.2.0</CORERuleVersion>
      <Payload>
        <![CDATA[ISA*00* *00* *ZZ*...IEA*1*00000001~]]>
      </Payload>
    </ns1:COREEnvelopeRealTimeRequest>
  </soapenv:Body>
</soapenv:Envelope>
```

SOAP Curl Example 270

```
curl --location 'https://wsd.officeally.com/TransactionService/rtx.svc' \
--header 'Content-Type: application/soap+xml; charset=utf-8;action=RealTimeTransaction;' \
--header 'Action: RealTimeTransaction' \
--data '<soapenv:Envelope xmlns:soapenv="http://www.w3.org/2003/05/soap-envelope">
  <soapenv:Header>
    <wsse:Security xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
      <wsse:UsernameToken>
        <wsse:Username>USERNAME</wsse:Username>
        <wsse:Password>PASSWORD</wsse:Password>
      </wsse:UsernameToken>
    </wsse:Security>
  </soapenv:Header>
  <soapenv:Body>
    <ns1:COREEnvelopeRealTimeRequest xmlns:ns1="http://www.cagh.org/SOAP/WSDL/CORERule2.2.0.xsd">
      <PayloadType>X12_270_Request_005010X279A1</PayloadType>
      <ProcessingMode>RealTime</ProcessingMode>
      <PayloadID>f81d4fae-7dec-11d0-a765-00a0c91e6bf6</PayloadID>
      <TimeStamp>CCYY-MM-DDTHH:MM:SSZ</TimeStamp>
      <SenderID>SENDERID</SenderID>
      <ReceiverID>OFFALLY</ReceiverID>
      <CORERuleVersion>2.2.0</CORERuleVersion>
      <Payload>
        <![CDATA[ISA*00* *00* *ZZ*...IEA*1*00000001~]]>
      </Payload>
    </ns1:COREEnvelopeRealTimeRequest>
  </soapenv:Body>
</soapenv:Envelope>'
```

SOAP Example 276

```
<soapenv:Envelope xmlns:soapenv="http://www.w3.org/2003/05/soap-envelope">
  <soapenv:Header>
    <wsse:Security xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
      <wsse:UsernameToken>
        <wsse:Username>USERNAME</wsse:Username>
        <wsse:Password>PASSWORD</wsse:Password>
      </wsse:UsernameToken>
    </wsse:Security>
  </soapenv:Header>
  <soapenv:Body>
    <ns1:COREEnvelopeRealTimeRequest xmlns:ns1="http://www.caqh.org/SOAP/WSDL/CORERule2.2.0.xsd">
      <PayloadType>X12_276_Request_005010X212</PayloadType>
      <ProcessingMode>RealTime</ProcessingMode>
      <PayloadID>f81d4fae-7dec-11d0-a765-00a0c91e6bf6</PayloadID>
      <TimeStamp>CCYY-MM-DDTHH:MM:SSZ</TimeStamp>
      <SenderID>SENDERID</SenderID>
      <ReceiverID>OFFALLY</ReceiverID>
      <CORERuleVersion>2.2.0</CORERuleVersion>
      <Payload>
        <![CDATA[ISA*00*          *00*          *ZZ*...IEA*1*000000001~]]>
      </Payload>
    </ns1:COREEnvelopeRealTimeRequest>
  </soapenv:Body>
</soapenv:Envelope>
```

SOAP Curl Example 276

```
curl --location 'https://wsd.officeally.com/TransactionService/rtx.svc' \
--header 'Content-Type: application/soap+xml; charset=utf-8;action=RealTimeTransaction;' \
--header 'Action: RealTimeTransaction' \
--data '<soapenv:Envelope xmlns:soapenv="http://www.w3.org/2003/05/soap-envelope">
  <soapenv:Header>
    <wsse:Security xmlns:wsse="http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd">
      <wsse:UsernameToken>
        <wsse:Username>USERNAME</wsse:Username>
        <wsse:Password>PASSWORD</wsse:Password>
      </wsse:UsernameToken>
    </wsse:Security>
  </soapenv:Header>
  <soapenv:Body>
    <ns1:COREEnvelopeRealTimeRequest xmlns:ns1="http://www.caqh.org/SOAP/WSDL/CORERule2.2.0.xsd">
      <PayloadType>X12_276_Request_005010X212</PayloadType>
      <ProcessingMode>RealTime</ProcessingMode>
      <PayloadID>f81d4fae-7dec-11d0-a765-00a0c91e6bf6</PayloadID>
      <TimeStamp>CCYY-MM-DDTHH:MM:SSZ</TimeStamp>
      <SenderID>SENDERID</SenderID>
      <ReceiverID>OFFALLY</ReceiverID>
      <CORERuleVersion>2.2.0</CORERuleVersion>
      <Payload>
        <![CDATA[ISA*00*          *00*          *ZZ*...IEA*1*000000001~]]>
      </Payload>
    </ns1:COREEnvelopeRealTimeRequest>
  </soapenv:Body>
</soapenv:Envelope>'
```

MIME Example 270

```
POST /core/eligibility
HTTP/1.1 HOST: server host:
server port Content-Length:
2408
Content-Type: multipart/form-data; boundary=XbCY

--XbCY
Content-Disposition: form-data; name="PayloadType" X12_270_Request_005010X279A1

--XbCY
Content-Disposition: form-data; name="ProcessingMode" RealTime

--XbCY
Content-Disposition: form-data; name="PayloadId" f81d4fae-7dec-11d0-a765-
00a0c91e6bf6

--XbCY
Content-Disposition: form-data; name="Timestamp" CCYY-MM-DDTHH:MM:SSZ

--XbCY
Content-Disposition: form-data; name="UserName"
USERNAME

--XbCY
Content-Disposition: form-data; name="Password"
PASSWORD

--XbCY
Content-Disposition: form-data; name="SenderId"
SENDERID

--XbCY
Content-Disposition: form-data; name="ReceiverId"
OFFALLY

--XbCY
Content-Disposition: form-data; name="CORERuleVersion" 2.2.0

--XbCY
Content-Disposition: form-data; name="Payload"
ISA*00*          *00*          *ZZ*...IEA*1*000000001~

--XbCY--
```


MIME Curl Example 270

```
curl --location 'https://wsd.officeally.com/TransactionSite/realtime-request/MIME' \
--form 'PayloadType="X12_270_Request_005010X279A1"' \
--form 'PayloadId="2457fe0c-568c-4769-9d76-b481804253ec"' \
--form 'ReceiverId="OFFALLY"' \
--form 'Payload="ISA*00*      *00*      *ZZ*...IEA*1*000000001~"' \
--form 'SenderId="SENDERID"' \
--form 'TimeStamp="CCYY-MM-DDTHH:MM:SSZ"' \
--form 'UserName="USERNAME"' \
--form 'ProcessingMode="RealTime"' \
--form 'Password="PASSWORD"' \
--form 'CoreRuleVersion="2.2.0"'
```

MIME Example 276

```
POST /core/eligibility
HTTP/1.1 HOST: server host:
server port Content-Length:
2408
Content-Type: multipart/form-data; boundary=XbCY

--XbCY
Content-Disposition: form-data; name="PayloadType" X12_276_Request_005010X212

--XbCY
Content-Disposition: form-data; name="ProcessingMode" RealTime

--XbCY
Content-Disposition: form-data; name="PayloadId" f81d4fae-7dec-11d0-a765-
00a0c91e6bf6

--XbCY
Content-Disposition: form-data; name="Timestamp" CCYY-MM-DDTHH:MM:SSZ

--XbCY
Content-Disposition: form-data; name="UserName"
USERNAME

--XbCY
Content-Disposition: form-data; name="Password"
PASSWORD

--XbCY
Content-Disposition: form-data; name="SenderId"
SENDERID

--XbCY
Content-Disposition: form-data; name="ReceiverId"
OFFALLY

--XbCY
Content-Disposition: form-data; name="CORERuleVersion" 2.2.0

--XbCY
Content-Disposition: form-data; name="Payload"
ISA*00*                *00*                *ZZ*...IEA*1*000000001~

--XbCY--
```

MIME Curl Example 276

```
curl --location 'https://wsd.officeally.com/TransactionSite/realtime-request/MIME' \  
--form 'PayloadType="X12_276_Request_005010X212"' \  
--form 'PayloadId="2457fe0c-568c-4769-9d76-b481804253ec"' \  
--form 'ReceiverId="OFFALLY"' \  
--form 'Payload=" ISA*00*      *00*      *ZZ*...IEA*1*000000001~"' \  
--form 'SenderId="SENDERID"' \  
--form 'TimeStamp="CCYY-MM-DDTHH:MM:SSZ"' \  
--form 'UserName="USERNAME"' \  
--form 'ProcessingMode="RealTime"' \  
--form 'Password="PASSWORD"' \  
--form 'CoreRuleVersion="2.2.0"'
```

Transaction Data Requirements

The purpose of this section is to outline the OA specific ASC X12N Control Segment specifications for real-time transmissions. These include the Interchange Control Header Segment (ISA), the Functional Group Header Segment (GS), the Functional Group Trailer Segment (GE) and the Interchange Control Trailer Segment (IEA).

Interchange Control Header (ISA) segment

The ISA segment is the only EDI segment with a fixed length. A total of 105 positions are allowed in the ISA segment, including the letters ISA, the asterisk (*) or another value used as a data element separator (also known as an element delimiter), and the colon (:) or other sub-element separator (also known as a composite element delimiter). The value in position 106 is reserved for the tilde (~) or other segment terminator character used to denote the end of each segment.

Once specified in the interchange header, the delimiters and terminators cannot be used in a data element value elsewhere in the file. OA can accept as a data element any value in the Basic and Extended Character Sets referenced in Appendix B.1.1.2 of 5010 ANSI X12N TR3s.

The following table defines the OA-specific requirements for the Interchange Control Header (ISA) segment.

Data Element	Name	Element	Office Ally Requirement
ISA01	Authorization Information Qualifier	2	00
ISA02	Authorization	10	Exactly 10 spaces
ISA03	Security Information Qualifier	2	00
ISA04	Security Information	10	Exactly 10 spaces
ISA05	Interchange ID Qualifier	2	ZZ
ISA06	Interchange Sender ID	15	OA assigned Sender ID padded with trailing spaces
ISA07	Interchange ID Qualifier	2	01
ISA08	Interchange Receiver ID	15	OFFALLY padded with trailing spaces
ISA09	Interchange Date	6	YYMMDD
ISA10	Interchange Time	4	HHMM
ISA11	Repetition Separator	1	This value must be different than the data element separator, component element separator, and the segment terminator.
ISA12	InterchangeControl Version Number	5	00501
ISA13	InterchangeControl Number	9	Tracking number assigned by the sender for the transaction. Must be a positive unsigned number and be identical to the value in IEA02.
ISA14	AcknowledgementRequested	1	0
ISA15	UsageIndicator	1	P
ISA16	Component Element Separator	1	This value must be different from the data element separator, repetition separator, and segment terminator.

Interchange Control Trailer (IEA) segment

The following table defines the OA-specific requirements for the Interchange Control Trailer (IEA) segment, which is paired with the Interchange Control Header (ISA) segment.

Data Element	Name	Element Length	Office Ally Requirement
IEA01	Number of Included Functional Groups	1	1
IEA02	Interchange Control Number	9	Tracking number assigned by the sender for the transaction. Must be identical to the Interchange Control Header ISA13 element.

Functional Group Header (GS) segment

The following table defines the OA-specific requirements for the Functional Group Header (GS) segment.

Data Element	Name	Element Length	Office Ally Requirement
GS01	Functional Identifier Code	2	For 270: HS For 276: HR
GS02	Application Sender's Code	2 - 15	OA assigned Sender ID
GS03	Application Receiver's Code	7	OFFALLY
GS04	Date	8	CCYYMMDD
GS05	Time	4	HHMM
GS06	Group Control Number	1 - 9	Tracking number assigned by the sender for the transaction. Must be identical to the Trailer GE02.
GS07	Responsible Agency Code	1	X
GS08	Version / Release / Industry Identifier Code	10 or 12	For 270: 005010X279A1 For 276: 005010X212

Functional Group Trailer (GE) segment

The following table defines the OA-specific requirements for the Functional Group Trailer (GE) segment, which is paired with the Functional Group Header (GS) segment.

Data Element	Name	Element Length	Office Ally Requirements
GE01	Number of Transaction Sets	1	1
GE02	Group Control Number	1 - 9	Tracking number assigned by the sender for the transaction. Must be identical to the Functional Group Header GS06 element.

Office Ally Error Responses

Error Condition: 270 or 276 transaction contains syntax or TR3 compliance issues

- ❖ Response: The appropriate X12 compliant 999 or TA1 response. These errors will explicitly define the issue. The 999 TR3 should be consulted to fully understand the contents of the response.

Error Condition: 270 transactions where the payer system is down or encounters a system error

- ❖ Response: A 271 including a AAA error containing AAA03 error code of '42' (Unable to Respond at Current Time).

Transactions receiving this error type can be resubmitted at a later time, but Submitters are encouraged not to auto-resubmit on a continuous basis. If such a AAA error persists, it may be a good idea to contact Real Time Support at realtime_support@officeally.com to inquire.

Error Condition: 270 transactions where there is a lack of payer response within timeout threshold

- ❖ Response: A 271 including a AAA error containing AAA03 error code of '80' (No Response Received - Transaction Terminated).

Transactions receiving this error type can be resubmitted at a later time, but Submitters are encouraged not to auto-resubmit on a continuous basis. If such a AAA error persists, it may be a good idea to contact Real Time Support at realtime_support@officeally.com to inquire.

Error Condition: 270 transactions with an unrecognized or invalid NPI

- ❖ Response: A 271 including a AAA error containing an appropriate 2100B level AAA03 error code.

Most payers require that Submitters have signed service agreements with them. When a Transaction is sent to a payer and the payer does not find that NPI in its database of approved providers, they may send a AAA response.

Error Condition: 270 transaction does not meet the X12 minimum Search Option criteria or that does not result in a match of the patient to a member in the Payer's system

- ❖ Response: A 271 including a AAA error containing AAA03 error code of '15' (Required Application Data Missing).
OR
- ❖ Response: A 271 including a AAA error containing an appropriate 2100C level AAA03 error code.

Additional Search Option offerings may vary by payer, but at a minimum, Office Ally's search criteria mirrors that of the ASC X12 Standards 5010 Search Option criteria.

Error Condition: 270 transaction contains a Date of Service request date or date range that is outside of the Payer's supported date of service inquiry period.

- ❖ Response: A 271 including a AAA error containing an appropriate 2100C level AAA03 error code.

Every Payer has different past and future cutoff dates for Eligibility Verification.

Error Condition: 270 transaction violates any other payer-defined requirement

- ❖ Response: A 271 including the appropriate AAA error.

Contact Information

- Realtime Support
Email: realtime_support@officeally.com
- Client Services
Days Available: Monday thru Friday
Times Available: 6:00 am to 6:00 pm
PST Phone: 360.975.7000
Fax: 360.896.2151
Web/Chat: <https://cms.officeally.com/form-contact-form-new>