



**Oklahoma Workers' Compensation Commission  
(OK WCC)  
Trading Partner Profile Registration Instructions**

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## Overview:

This OK WCC EDI Trading Partner Profile Registration provides each trading partner with the ability to create and submit a New Profile or an Updated Trading Partner Profile. This form will uniquely identify a trading partner as the sender of the data, how the data will be sent, the business & technical contacts, and the demographics for the Subsidiary Insurers and Claim Administrators.

Upon **completion** of the EDI Trading Partner Profile online, an auto response email will be sent to the primary contact and to the OK WCC. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Please see the email example in the [OK WCC Trading Partner Profile Registration Email Example](#) section.

Upon **approval** of the EDI Trading Partner Profile by the OK WCC, the EDI Support Team will contact the primary contact to indicate when the profile will become effective for EDI reporting.

In addition to registering electronically, in accordance with 85A O.S., §6(A)(1)(a) and 85A O.S. §123, trading partners must also complete the Trading Partner Agreement located on the left-hand side of OK WCC's EDI Website, underneath the Trading Partner Registration Instructions document link. The signed agreement must be emailed to [okwccedi@iso.com](mailto:okwccedi@iso.com).

The following provides information for accessing and completing a NEW or UPDATED OK WCC EDI Trading Partner Profile.

# Accessing and Creating an Account for the Trading Partner Profile:

In order to access and complete a Trading Partner Profile, the Trading Partner will need to sign in to [ISO's Trading Partner Registration system](#) (if previously registered).

If this is the **first time** accessing the OK WCC FROI/SROI Trading Partner Registration system, create an account by clicking on the 'Get Started' button. Once the 'Get Started' button is selected, enter your e-mail address and choose a password for your new account.

After your account has been created, a message will be sent to the specified e-mail address from [www-data@wccapture.com](mailto:www-data@wccapture.com) with an activation code to activate your account. Once the activation code is obtained, enter the code in the 'Activation Code' box and click 'Continue'.

Sign In

Username

Password

[Sign In](#) [Forgot Password?](#)

Create Account

**New user?** Create an account below to begin using the ISO Trading Partner Registration system.

[Get Started](#)

Once signed in the Trading Partner will have the option to create a new profile if it's the first time or update a previously submitted profile. Any previously submitted Trading Partner would be available on the below screen:

Trading Partner Profiles	<h2>Trading Partner Profiles</h2> <p>Welcome to the Trading Partner Registration system. Get started creating your first profile by clicking the button below.</p> <p style="text-align: center;"><a href="#">Create New Profile</a></p>
My Profiles	
New Profile	

The Trading Partner Profile Registration system is made up of the following sections which will be explained in the How to complete a New OK WCC FROI/SROI EDI Trading Partner Profile section below:

Profile Sections
EDI Sender/Receiver
Preparer Contact Info
Primary Contact Info
Secondary Contact Info
Insurers
Claim Administrators
Filing Method
Comments
Submit Profile

## How to complete a New OK WCC FROI/SROI EDI Trading Partner Profile:

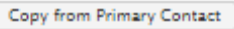
In order to create a New Profile, click on the 'Create New Profile' button.

Required fields are indicated throughout the instructions in bold formatting. Upon clicking on the 'Continue' button or 'Next Page' button, any required fields that are not completed will be noted with a red box around the required field.

When filling out the profile, if you see a reference to a DN, e.g., Insurer Name (DN0007), this will indicate that the information requested is a Data Element (DN) that is part of the Claims EDI Release 3 report and will be reported to OK WCC in EDI reports.

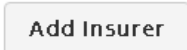
- a. **EDI Sender:** This section provides identifying information about the Master Trading Partner (Sender).
  - a. **Sender Master FEIN:** Enter the Federal Employer Identification Number (FEIN) of your business entity. Please enter 9 digits with no punctuation.
  - b. **Sender Postal Code:** Enter the Postal Code (Zip+4) of your business entity. Please enter 9 digits with no punctuation. Once Sender Master FEIN and Sender Postal Code fields are populated click on 'Continue'.
  - c. **Company Name:** Enter the Company Name of the EDI Sender. The Company Name should be the entire name as listed on any licensing/registration applications filed with the OK WCC and OK Insurance Department and not an acronym.
  - d. **Company Type:** Please indicate the Company Type of the EDI Sender if either Third Party Administrator, Insurer, Self-Insurer or Employer.
  - e. **Group FEIN:** This will be automatically populated with the Sender Master FEIN entered in the previous screen. Group FEIN will be utilized to allow a sender/company that purchased another company to be able to update the Claim Admin FEIN, etc on a given claim in the same group even though they will have a different Sender ID (FEIN/PC).
  - f. **Release 3 Jurisdictions:** Please indicate the number of Release 3 Jurisdictions that your company currently reports to.

Note: Sender Master FEIN and Sender Postal Code should be the same as those that the partner will use as the Sender ID (DN0098) in the Header Record of all of its EDI transmissions. Once the Company Name is populated and the Company Type is selected, click on 'Next Page'.

- b. Preparer Contact Information: This section provides identifying information about the person completing the EDI Trading Partner Profile.
  - a. **Preparer Name:** Enter the contact name of the person completing the EDI Trading Partner Profile.
  - b. **Preparer Job Title:** Enter the preparer's job title.
  - c. **Preparer Address, City, State, and Zip:** Enter the preparer's address.
  - d. **Preparer Phone, Fax, and Email:** Enter the preparer's phone, fax and email address.
  
- c. Primary/Secondary Contact for EDI Implementation/Setup: This section provides the ability to identify individuals within your business entity who can be used as the main contacts for this trading partner profile. Two types of contacts should be identified: one for business practices and issues, and one for technical issues. Enter the information below for both a business and technical contact that is the main contact for your company. In the event there is any communication on the EDI reporting, claims, requirements, etc. these contacts will be notified. On the form, click the 'radio button' beside Business or Technical and complete the following information for each specific contact. The first contact entered will be the primary contact. If the secondary contact is the same as the primary, click on 'Copy from primary contact' 
  - a. Primary Contact Type: Business or Technical
  - b. Contact Name: **First**, Middle, **Last**, Suffix
  - c. Job Title: **Contact's Job Title**
  - d. **Address Line 1**, Address Line 2, **City, State, Zip**
  - e. **Phone, Fax, Email**
  - f. Secondary Contact Type: Business or Technical
  - g. Contact Name: **First**, Middle, **Last**, Suffix
  - h. Job Title: Enter **Contact's Job Title**
  - i. **Address Line 1**, Address Line 2, **City, State, Zip**
  - j. **Phone, Fax, Email**

d. Subsidiary Insurer(s):

This section of the form identifies the trading partners using this Sender to transmit data electronically to the OK WCC. At least one Subsidiary Record is required for a new trading partner profile. If the Sender is also an insurer (Subsidiary), add a Subsidiary record with the Sender's information. If there is more than one Subsidiary, complete a subsidiary section for each one. Provide the full Insurer Legal Name (DN0007), Insurer FEIN (DN0006) and Insurer Type for each insurer (insurer or self-insurer) for whose claims the Sender will be transmitting data. OK WCC will notify the Sender of any discrepancy between the identifying information entered and the OK WCC's present records. This list will be used to reconcile identification tables, and it will be used as part of the edit on Insurer FEIN to match the OK WCC's database. Complete an UPDATED OK WCC EDI Trading Partner Profile to add or remove subsidiaries.



: This button is used to allow you to access the entry to add new Insurer on a NEW or UPDATED EDI Trading Partner Profile.

**ACTIONS**

Edit -

Remove

: This button is used to allow you to remove the last Insurer that was entered during the current EDI Trading Partner Profile submission.

a. To 'Add an Insurer':

- Click on the 'Add Insurer' button
- Enter the applicable Insurer information. Required fields are highlighted in red below; **Insurer FEIN**, **Insurer Name** and **Insurer Type**:

**Insurer FEIN**   
Required field

**Insurer Name**   
Required field

**Insurer Type**   
Required field

b. To continue 'Adding Insurers':

- Click the 'Add Insurer' button again, otherwise proceed to the Add Claim Administrator(s) section.
- By clicking 'Add Insurer' another Insurer entry will be presented (# 2 in this case). Complete the required information and repeat the process to add the Insurer until completed, and then move to the Claim Administrator section.

**Insurer(s)**


FEIN	INSURER NAME	STATUS	ACTIONS
123456789	Insurer #1		Edit -
753159789	Insurer #2		Edit -

Add Insurer    Next Page

c. To remove the last Subsidiary Insurer entered during the entry of the profile:

- Click on the downward arrow alongside the 'Edit' button in the Action column of the Subsidiary Insurer and select 'Remove'.

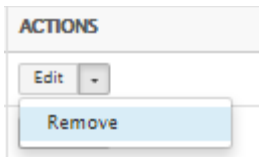


- Once selected, then confirm you wish to delete this entry just added by clicking on 'Delete Insurer':  and the entry that has not been submitted previously, (i.e. was just added when editing), then is deleted.

e. **Claim Administrator(s):** Provide the Claim Administrator’s information including the physical address and mailing address that will correspond to that of the Claim Administrator recorded on the claim(s) that will be reported by the Sender (Trading Partner). If the claim administrator is the same entity as the Sender then enter the Sender claim contact information. This information will be used to identify and reconcile Trading Partner relationships. It is understood that this list will have entries added or removed from time to time for which an updated report should be sent to the OK WCC as outlined within this document.



: This button is used to allow you to access the entry to add a new Claim Administrator on a NEW EDI Trading Partner Profile or to add Claim Administrators on an UPDATED EDI Trading Partner Profile.



: This button is used to allow you to remove the last Claim Administrator that was entered during the current EDI Trading Partner Profile submission.

- To 'Add a Claim Administrator':
  - Click on the 'Add Claim Admin' button
  - Enter the applicable Claim Administrator information. Required fields are highlighted in red below; **Claim Administrator FEIN (DN0187), Claim Administrator Name(DN0188), Claim Administrator Information/Attention Line (DN0135), Claim Administrator or Claim Representative Name(DN0140), Claim Administrator Claim Representative Phone Number(DN0137), Claim Administrator Mailing Address(DN0010), Claim Administrator Mailing Secondary Address, Claim Administrator Mailing City (DN0012), Claim Administrator Mailing State Code(DN0013), Claim Administrator Mailing Postal Code(DN0014), Claim Administrator Physical Address, Claim Administrator Physical Secondary Address, Claim Administrator Physical City, Claim Administrator or Physical State Code, Claim Administrator Physical Postal Code (DN0200).**



**Claim Admin FEIN**

DN0187

Required field

**Claim Admin Name**

DN0188

Required field

**Information/ Attention Line**

DN0185

Required field

**Claim Representative Name**

DN0140

Required field

**Claim Representative Phone**

Required field

#### Claim Admin Mailing Address

**Primary Address**

Required field

**Secondary Address**

**City**

Required field

**State**

Required field

**Postal Code**

Required field

#### Claim Admin Physical Address

**Primary Address**

Required field

**Secondary Address**

**City**

Required field

**State**

Required field

**Postal Code**

Required field

b. To continue 'Adding Claim Administrators':

- Click the Add Claim Admin button otherwise proceed to complete the EDI Trading Partner Profile.
- By clicking 'Add Claim Admin' another Claim Admin entry screen will be presented (# 2 in this case). Complete the required information and repeat the process to add the Claim Administrators until completed, and then proceed to complete the EDI Trading Partner Profile.

**Claim Administrators**

FEIN	CLAIM ADMIN NAME	STATUS	ACTIONS
753159789	Claim Admin #1		Edit ▾
951234567	Claim Admin #2		Edit ▾

c. To remove the last Claim Administrator entered:

- Click on the downward arrow alongside the 'Edit' button in the Action column of the Claim Administrator and select 'Remove'.

951234567	Claim Admin #2	Added	Edit ▾ Remove
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- Once selected, then confirm you wish to delete this entry just added by clicking on 'Delete Claim Administrator':  and the entry that has not been submitted previously, (i.e. was just added when editing), then is deleted.

f. Filing Method: At least one method required.

- a. **EDI Vendor:** If you are using an EDI Vendor to submit your EDI reporting, complete this section.

First click the 'radio button' beside EDI Vendor. Then complete the following information.

Vendor Company Name: Enter the Vendors Company Name.

Vendor Contact Name: Enter the Vendors Contact Name.

Vendor Phone: Enter the Vendors Phone Number.

Vendor Email: Enter the Vendors Email Address.

- b. **Jurisdiction Web Entry:** Select Jurisdiction Web Entry if Sender will be entering reports manually via web entry.
- c. **Direct SFTP:** Select Direct SFTP if Sender will be exchanging EDI files directly with the OK WCC's vendor using SFTP.

- d. **Other, please explain:** First click the 'radio button' beside 'other, please explain'. Then enter the information in the area provided.
- g. **Comments:** Please include any comments in this section. Clicking on 'Next Page' will direct you to the 'Submit Profile' section.

Comments

- h. **Submit the OK WCC EDI Trading Partner Profile:** Click the 'Submit Profile' button on the Submit Profile section to complete the registration process. An email confirmation will be generated per the example in [OK WCC Trading Partner Profile Registration Email Example section](#). OK WCC will respond via email on confirmation and approval of the OK WCC EDI Trading Partner relationship


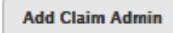
## How to Update an Existing OK WCC FROI/SROI EDI Trading Partner Profile:



To update a previously submitted Trading Partner Profile, select 'Update' in the actions column of the Trading Partner Profile to be updated:



Trading Partner Profiles		Trading Partner Profiles					
My Profiles		JUR	TYPE	COMPANY FEIN	COMPANY NAME	STATUS	ACTIONS
New Profile		ST	FROI/SRO	111111111	Trading Partner (Sender)	Submitted	Update

### a. To Update Subsidiary Insurers or Claim Administrators:

There are 3 options for updating Subsidiary Insurers (Insurer Section) and/or Claim Administrators (Claim Administrators Section) within the EDI Trading Partner Profile Update:


- Click the 'Add Insurer' button:  to add a new Subsidiary-Insurer or click on the 'Add Claim Admin' button:  to add a Claim Administrator to your EDI Trading Partner Profile (one that has never been added or was added and removed).

- Click on 'Remove':  (drop-down of the 'Edit' button) then click on 'Mark Inactive' , to set a Subsidiary Insurer or Claim Administrator from your EDI Trading Partner Profile that has been submitted to the OK WCC previously as inactive.

- Click on the 'Edit' button:  to update the Subsidiary Insurer or Claim Admin entry fields previously submitted to the OK WCC.
- Once all updates necessary are completed, submit the profile by selecting the 'Submit Profile' button:  in the Submit Profile Section.

### b. To Update Additional Sections of the Trading Partner Profile:

To update any of the other sections (EDI Sender, Preparer Contact Info, Primary Contact Info, Secondary Contact Info, and Filing Method) select the corresponding section and update the fields that need to be updated. Then provide a comment of any additional changes made in the Comments section.

- Once all updates necessary are completed, submit the profile by selecting the 'Submit Profile' button:  in the Submit Profile Section.

c. To Change Sender ID:

There is an option available to update any portion of the Sender ID (Sender FEIN or Sender Postal Code) of a previously submitted Trading Partner Profile. Click on 'Change Sender ID' (drop-down of the 'Update' button) and you will be redirected to the Sender ID section where you may edit either the Sender FEIN or Sender Postal Code.



JUR	TYPE	COMPANY FEIN	COMPANY NAME	STATUS	ACTIONS
ST	FROI/SROI	111111111	Trading Partner (Sender)	Submitted	Update <input type="button" value="v"/>

Change Sender ID

Note: If all updates made to the existing Trading Partner Profile need to be canceled, in the

Submit Profile section , select the 'Cancel Updates' button.

Cancel Updates

## OK WCC Trading Partner Profile Registration Email Example

Upon **completion** of the EDI Trading Partner Profile online, an auto response email will be sent to the primary contact and to the OK WCC. This will serve as notification to all parties of the EDI Trading Partner information for EDI implementation. Below is an example of the OK WCC EDI Trading Partner Profile registration. The information that is completed on the profile will be included in the email.

-----Original Message-----

From: [www-data@wccapture.com](mailto:www-data@wccapture.com) [mailto:[www-data@wccapture.com](mailto:www-data@wccapture.com)]

Sent: Wednesday, September 7, 2016 2:34 PM

To: [okwccedi@wcc.ok.gov](mailto:okwccedi@wcc.ok.gov)

Cc: OKWCCEDI; *Preparer's Email; Primary Contact's Email here*

Subject: EDI New Profile OK - *Your Company's Name here*

-- Electronic Data Interchange Profile --

Jurisdiction: OK

EDI Profile: *New or Update here*

-- EDI Sender/Receiver (Primary Insurer/TPA) --

Company Name:

Master FEIN:

Postal Code:

-- Preparer Contact Information --

Preparer Name:

Preparer Title:

Preparer Addr 1:

Preparer Addr 2:

Preparer City:

Preparer State:

Preparer Zip:

Preparer Phone:

Preparer Fax:

Preparer Email:

-- Filing Information --

Filing Method:

-- Primary Contact for EDI Implementation/Setup --

Primary Contact Type: Business

Primary Contact First Name:

Primary Contact Middle Name:

Primary Contact Last Name:

Primary Contact Suffix:

Primary Contact Title:

Primary Contact Addr 1:

Primary Contact Addr 2:

Primary Contact City:

Primary Contact State:

Primary Contact Zip:

Primary Contact Phone:

Primary Contact Fax:

Primary Contact Email:

-- Secondary Contact --  
Secondary Contact Type: Technical  
Secondary Contact First Name:  
Secondary Contact Middle Name:  
Secondary Contact Last Name:  
Secondary Contact Suffix:  
Secondary Contact Title:  
Secondary Contact Addr 1:  
Secondary Contact Addr 2:  
Secondary Contact City:  
Secondary Contact State:  
Secondary Contact Zip:  
Secondary Contact Phone:  
Secondary Contact Fax:  
Secondary Contact Email:

-- Subsidiary Insurers --  
-- Subsidiary (1) --  
Subsidiary Status: [Remove](#)  
Status Effective: 09/28/2016  
Insurer Name (DN0007):  
Insurer FEIN (DN0006):  
Subsidiary Type: Insurer

-- Subsidiary (2) --  
Subsidiary Status: [Add](#)  
Status Effective: 09/28/2016  
Insurer Name (DN0007):  
Insurer FEIN (DN0006):  
Subsidiary Type: Insurer

-- Claim Administrators --

-- Claim Administrator (1) --  
Claim Administrator Status: [Add](#)  
Status Effective Date: 09/28/2016  
Claim Admin Name (DN0188):  
Claim Admin FEIN (DN0187):  
Representative Name (DN0140):  
Representative Business Phone:  
Mailing Primary Addr (DN0010):  
Mailing Secondary Addr (DN0011):  
Mailing City (DN0012):  
Mailing State Code (DN0013):  
Mailing Postal Code (DN0014):  
Physical Primary Address:  
Physical Secondary Address:  
Physical City:  
Physical State Code  
Physical Postal Code (DN0200):

-- Claim Administrator (1) --  
Claim Administrator Status: [Remove](#)

Status Effective Date: 09/28/2016  
Claim Admin Name (DN0188):  
Claim Admin FEIN (DN0187):  
Representative Name (DN0140):  
Representative Business Phone:  
Mailing Primary Addr (DN0010):  
Mailing Secondary Addr (DN0011):  
Mailing City (DN0012):  
Mailing State Code (DN0013):  
Mailing Postal Code (DN0014):  
Physical Primary Address:  
Physical Secondary Address:  
Physical City:  
Physical State Code  
Physical Postal Code (DN0200):

Number of Release 3 Jurisdictions currently reporting to: 5

Comments:  
Please update Trading Partner Profile. Thank you.