



Electronic Data Interchange (EDI) Agreement

Employer Name: _____

Employer Contact: _____

Employer Phone: _____

Employer Email: _____

Vendor Name: _____

Vendor Contact: _____

Vendor Phone: _____

Vendor Email: _____

Proposed Effective Date: _____

Service: ☐ FSA ☐ HSA ☐ HRA ☐ COBRA ☐ FMLA

(additional services may be added at any time and will be covered by this agreement)

These EDI guidelines document the terms and conditions for file transmittal of EDI files to BASIC for ongoing benefits eligibility management.

Employer Responsibilities:

- A. To manage all aspects of their Vendor to ensure progress and timeliness for setting up EDI files, ensuring the Vendor is following BASIC's process and data requirements for implementing EDI files
- B. To provide contact information for both Employer and Vendor representatives involved in the EDI setup process and ongoing support
- C. To ensure all electronic data by Vendor will:
 - a. Be in BASIC's provided format
 - b. Contain all information required by BASIC with accurate data values
 - c. Be submitted securely to BASIC using the appropriate protocol provided by BASIC
- D. To be solely responsible for the accuracy of all data submitted to BASIC by the Vendor
- E. To be solely responsible for the timely delivery of all EDI files submitted to BASIC; the Employer may want the EDI files also sent to them so they can monitor delivery and content
- F. To provide missing required data and understand files will not be processed until such data is provided by Employer; for example, many Vendors are unable to provide payroll data that is required
- G. Ensure Vendor provides EDI test files with notification that they've been transmitted to BASIC; BASIC will determine if and when the files can be implemented or if further testing is required
- H. Ensure review of monthly reports and notify BASIC of any discrepancies (emailed and/or on BASIC's online portal)
- I. Ensure EDI production files go live (production status) on a date agreed upon with BASIC and the Vendor:
 - a. The setup of EDI files with BASIC is separate from setting up new services with BASIC and in most situations EDI files may begin after the service start date with BASIC
 - b. Until EDI files go live (production status), the Employer is responsible to submit any ongoing data changes to BASIC through BASIC's typical mechanisms (online forms) in a timely manner
 - c. If the EDI files do not meet BASIC's requirements then a monthly processing fee will be established



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BASIC Responsibilities:

- A. To provide an overview of BASIC's EDI process and information to help manage EDI setup with the Vendor
- B. To coordinate with the Vendor, answering questions about data requirements, formats, and secure transmission
- C. To provide a designated secure protocol for Vendor to submit EDI files
- D. To review and test EDI files for accuracy; BASIC will determine if the EDI data meets the requirements and, if not, BASIC will determine if the files can be implemented and establish a monthly processing fee
- E. To work with the Employer and their Vendor to establish a go live date (production status) once testing is complete and EDI files are determined to meet BASIC's requirements
- F. To process all EDI files received

EDI Pricing:

No fees will be assessed without prior discussion and agreement with Employer.

- A. Setup Fees: There typically isn't a set-up fee. If BASIC spends more than 20 hours to establish the file(s) for a line of service, BASIC will charge \$115/hour for time spent over 20 hours.
- B. Monthly Fees (if applicable): Monthly fees will be assessed on a case by case basis for each line of service (likely between \$50 and \$250 per month) for EDI files with the following issues:
 - a. Files not provided in BASIC's format
 - b. Required data is missing/not provided
 - c. Data is inaccurate or conflicting data is provided
 - d. Files transmitted in a non-standard manner
 - e. Other reasons as determined by BASIC

Employer

Authorized Signature

Name

Title

Date

BASIC

Authorized Signature

Name

Title

Date