



ITRANS 2.0

Getting Started for Dental Software Vendors

UPDATED FOR ICD v4.1

Revision History

Date	Revision	Changes	ICD Version
2018-08-15	1.0	<ul style="list-style-type: none">Initial version	1.0
2019-01-29	1.1	<ul style="list-style-type: none">Additional details on installation, testing, CDA Digital IDs and user accounts related to running the ICD and CCDWS services.	1.2
2021-04-22	1.2	<ul style="list-style-type: none">Addition of information related to connecting to ICD via API.Addition of information on obtaining a test CDA Digital IDAddition of information for end-to-end testing.	2.0.1.0
2022-04-01	1.3	<ul style="list-style-type: none">Addition of information for certificate auto-renewal	3.1.0
2023-08-05	1.4	<ul style="list-style-type: none">Updated for ICD v4Modification of information for ICD sending directly to networks as CCDWS is no longer required for DentistsAddition of CDA Services tray applicationNew section 6: Non-dental offices	4.0.0
2023-11-03	1.4.1	<ul style="list-style-type: none">Added comment for easier copying of text claim content at 4.1.2	4.0.2
2025-04-07	1.5	<ul style="list-style-type: none">Updated for ICD v4.1Added Silent Installation details for Windows ICD	4.1.0

Table of Contents

1	INTRODUCTION	1
1.1	New in ICD v4, and building on v3	1
2	WHY ITRANS 2.0?	2
2.1	ITRANS 2.0 Benefits: Installation and Integration	3
3	ITRANS 2.0 INSTALLATION: PRODUCTION CONFIGURATION	4
3.1	Installation Overview	4
3.2	Background	5
3.3	Decide what user the ICD service will run under	6
3.3.1	Consider exporting existing CDA Digital IDs	6
3.4	Install CDA Digital IDs	7
3.5	Install the ICD	7
3.5.1	Run the ICD Installer	7
3.5.2	Services error	10
3.5.3	Configure the PMS Application	10
3.5.4	Installation Summary	10
3.5.5	Silent Installation	11
4	TESTING ITRANS 2.0	12
4.1	Functional Testing	12
4.1.1	Test N-CPL Updating	12
4.1.2	Test Message Sending	13
4.1.3	Testing Message Storage	15
5	INTEGRATION: MAKE ITRANS 2.0 WORK FOR YOU	17
5.1	What's Next?	17
6	ITRANS 2.0 AND NON-DENTAL CLAIMS	18

1 Introduction

This document explains how to install, configure, and run the ITRANS Claims Director (ICD) software of ITRANS 2.0 for both testing and production. It is intended for vendors of CDAnet certified Practice Management Software (PMS) systems, and assumes the reader is familiar with CDAnet, ITRANS, the CDA Digital ID and the ICA and CCDWS communication drivers.

Additional vendor documentation is available:

- ITRANS 2.0 – Technical Reference for Dental Software Vendors: details related to installation, ongoing operation, and troubleshooting of the ICD, as well as details of the N-CPL and ITS.
- CDAnet Development Tools: This document describes how to connect to the CDAnet simulator with an ITRANS 2.0 office configuration.

Related software:

- CCDWS – Common Communication Driver for Web Services, Technical Reference and Operating Manual: information for installing, configuring, and operating the CCDWS communication driver. (NEW: With ICD v4, CCDWS is only required when non-dental (hygiene and denturist) claims will be sent from the office.)

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1.1 New in ICD v4, and building on v3

Version 4 of the ICD is a significant upgrade that includes the following functionality:

- ICD v4 is now also the communication agent for dentist claims. The CCDWS is no longer needed in dentist-only offices. The ITRANS 2.0 installation in a dental office requires only the ICD, making installation simpler.
- For non-dental offices, or offices that also send claims for denturists or independent dental hygienists, the ICD continues to provide non-dental claims to the CCDWS – see Section 6.
- Version 4.1 adds the option for a silent, unattended installation. This option has been added at the request of dental software vendors to provide automation options for installing the ICD at dental offices.

Building on ICD v3—the ICD retains the following functionality introduced in ICD v3:

- CDA Digital ID auto-renewal—the ICD routinely scans the CDA Digital IDs and automatically replaces IDs soon to expire, provided the dentist is still subscribed for CDA services in the office and is a member in good standing.
- CDA Practice Support tools. When the ICD is installed the CDA Practice Support tools application is also installed. Accessed from the Windows tray, this application has functionality to install CDA Digital IDs, start and stop the ICD service, update the ICD credentials, update the N-CPL carrier list, and more.

2 Why ITRANS 2.0?

Sending a CDAnet dental claim with ITRANS 2.0 is virtually the same as with the original ITRANS. However, ITRANS 2.0 has a completely different architecture that provides benefits for all parties involved—some of these are listed below:

For Software Vendors:

- Reduce support costs, claims processor changes—the automated Network-Claims Processor List, once integrated, will eliminate the need to assist offices with claims processor configuration changes, such as switching networks, adding new message types, or moving from v2 to v4 of CDAnet.
- Reduce support costs, Help Desk—with the CDA Help Desk and dental offices being able to see all the offices' CDAnet message traffic, issues may be resolved before they reach the software vendor. The standardized installation approach will help with troubleshooting too.
- Reduce support costs, future updates—the automatic update feature of the ICD has been designed to provide software updates without “breaking” existing configurations. This is helped by the standard installation recommendations.
- Reduce support costs, automatic certificate updates – the automatic certificate updates feature of the ICD has been designed to ensure dentists remain authorized to send CDAnet message traffic without needing to manually update their CDA Digital IDs when they expire.
- Improve security, API support – the API method of the ICD allows transactions to be sent to the ICD without having to put patient health information (PHI) in an unencrypted file. Traffic is kept secure and encrypted.

For Dentists:

- More supportable—all claims and messages will be visible to the CDA Help Desk, and to the dental office by logging into our PSS website, enabling better troubleshooting. Plus, the installation IDs created and sent to the Help Desk, along with operating system and other information, will provide for a better support experience.
- Automatic configuration—when software vendors integrate the automated Network-Claims Processor list, offices will always have the correct configuration information for each claims processor.
- System stability—with a distributed system and no ITRANS host receiving and switching all the claims, there is no single point that can cause system slowdowns or outages.
- Automatic Digital ID Updating – CDA Digital IDs are automatically updated by the ICD, preventing unexpected service interruptions when a Digital ID expires.
- PHI protection – when using the API method of the ICD, PHI is kept secure and encrypted.

For Claims Processors:

- Rapid return on investment—When claims processors make a change like a network change, moving from v2 to v4 or adding a transaction, when you have integrated the automated Network-Claims Processor, the change will be transmitted to all offices almost immediately, providing immediate return on investment for upgrades.

- More control—ITRANS 2.0 enables claims processors who use more than one network to direct the proportion of traffic that goes to one network or the other, and through CDA can change this in almost real time, providing redundancy and flexibility.
- Maximize capability of COBs—with fully encoded COB capabilities, once these are integrated by the software vendor, dental offices staff will know the answer to the question, “Can I send the secondary benefits claim electronically?”

2.1 ITRANS 2.0 Benefits: Installation and Integration

Some of these benefits, such as the auto-updating of CDA Digital IDs, occur as soon as ITRANS 2.0 is installed at an office. Others, like the auto-configuration of the claims processors, occur when you, the software vendor, have integrated the automated Network-Claims Processor List (N-CPL) into your application. With ITRANS 2.0, it is helpful to think of “installation” and “integration” as separate but related aspects.

Installation

This Getting Started guide is mostly about installation—installing ITRANS 2.0 into offices such that they no longer rely on the ITRANS host system, and claims are transmitted from the dental office directly to the network of the claims processor.

Installation involves installing the ITRANS software, called the ICD. Note that the ITRANS ICA communication driver is not used with ITRANS 2.0, the ICD takes care of the communications for dentist claims. The CDA Digital IDs do not need to be updated. If the office will be sending claims for denturists or independent dental hygienists as well as dentists, see Section 6, ITRANS 2.0 and Non-dental claims.

Integration

Integration means you code your application to use the Network-Claims Processor List (N-CPL) file, that ITRANS 2.0 will regularly download, to configure the settings in your software for claims processors—which messages they support, what co-ordination of benefits capabilities they have, etc. Network configuration will no longer be needed as ITRANS 2.0 takes care of that. There are more details in the technical reference manual. Benefits of integration include automated changes of claims processor configuration, and for office staff, easily answering the question, “can I send the secondary benefits claims electronically?”

3 ITRANS 2.0 Installation: Production Configuration

It is recommended you complete at least one test installation of ITRANS 2.0 before proceeding with a production installation at a dental office. Doing this will familiarize you with the different processes of ITRANS 2.0. See the section on test configuration later in this document.

➔ **Update: ICD v3 and newer is available with a PMS-ICD API interface (no file transfers)**

Version 4.0+ of the ICD is now available. The new features include:

- Direct communications with claims processors – ITRANS 2.0 no longer uses the CCDWS for dentist claims.
- Ability for the Practice Management Software (PMS) to transfer CDAnet message payloads (previously “input” files) and received responses via an API interface (called the “API method” below). This eliminates writing unencrypted input and output files (called the “file method” below) to the hard drive which is a potential security risk. More information follows though this document. Technical details are available in the ITRANS 2.0 Technical Reference Manual. The “File Method” continues to be available.
- Auto-updating of CDA Digital IDs. The ICD constantly checks the expiry date of the CDA Digital IDs it has access to, and when they are within 30 days of expiry, the ICD contacts CDA to see if the dentist is eligible for an updated certificate (still in the office, still a member). If they are, the ICD has a new CDA Digital ID issued and installed so there is no service disruption when the original CDA Digital ID expires.
- CDA Services Tray Application. A Windows tray application is installed that provides access to features such as installing a new CDA Digital ID with a secure code, updating the N-CPL claims processor list on demand, and shortcuts to access CDA Secure Send on the CDA PSS website.

3.1 Installation Overview

Below are the steps to follow:

1. Decide which Windows user account will have access to all of the dentists’ CDA Digital IDs, and, have rights to run the ICD service (see 3.3 below). This could be an existing user account, or a new account created specifically for this purpose.
2. Log into the PC as that user.
3. If not already available to the account to be used, install or import the CDA Digital IDs for each dentist while logged in as the user noted above.
4. If the installation will be for dental offices containing non dentist provider types (denturists and dental hygienists), install the CCDWS software.
5. Install the ICD software (See section 3.5).
6. In your PMS software:
 - a. Document the current configuration on where claim files are written to and read from for each network
 - b. Adjust the claims configuration to write and read the claim files for all networks to c:\ICD (assuming default locations are accepted). Skip this step if the API method of CDAnet message transfer is used.
7. Installation is complete. Test.

8. Rollback if needed – in your PMS software, return the claims configuration to the settings documented in step 6a above.

3.2 Background

Here is a short description of the local and external environments for ITRANS 2.0, and the processes involved.

On the dental office computer

The ITRANS 2.0 ITRANS Claims Director (ICD) software is installed on the computer that sends the CDAnet messages that your application creates. With ITRANS 2.0, depending on the method your software uses, it will either write claims to the ICD folder (the file method), or will submit the CDAnet messages to the ICD via the ICD API (the API method). The ICD will determine which network to send them to, establish a secure TLS connection with the network using the CDA Digital ID for the dentist/office, send the message to the network and receive the response.

Your software will receive responses from the ICD using either the file or API method, however it provided the originating message to the ICD.

Note that the ICD is designed to be run as a Windows service as not as an application. It is run under the user account where the certificates are stored, just like the ITRANS ICA. It is highly recommended the ICD be installed and run as a service, which is the default installation.

The ICD role between your software and the communication driver is necessary since some carriers use both networks and want a certain ratio of traffic between the networks (e.g. 50% Telus and 50% instream). The ICD manages this.

External environment

ITRANS 2.0 (ICD v4+) connects to three external sites:

- The ICD connects to the endpoints of the various networks contained in the N-CPL to transmit the CDAnet messages. These connections are authenticated with a CDA Digital ID for the dentist-office named in the CDAnet message (by UIN and office ID).
- The ICD connects to the N-CPL host (network-claims processor list) to receive updates of the N-CPL data file. This occurs on initial installation, on demand from a command line instruction, and when the ICD detects a change as described in the technical reference documentation. There is no need to authenticate these connections.
- The ICD connects to the ITRANS Transaction Storage (ITS) system to send de-identified copies of CDAnet messages as well as exception reports when an error occurs. These are used by the CDA Practice Support Services Help Desk and website for troubleshooting, and also provide for a view of claims traffic for the dental office via the CDA Practice Support Services (PSS) website. For CDAnet messages, these connections are authenticated with a CDA Digital ID for the dentist-office named in the CDAnet message (by UIN and office ID). For exception reports, there is no authentication.

There are both test and production versions of the N-CPL and ITS external sites. The installer will default to the production configuration. The connections to these sites use the standard http port 80. The details and business rules for these connections are provided in the technical reference document.

3.3 Decide what user the ICD service will run under

The ITRANS 2.0 ICD software is designed to be run as a Windows service. The service needs access to the CDA Digital IDs for the dentists in the clinic. This means the user account the ICD service runs under must be the same account the CDA Digital IDs are installed under.

For machines using the (original) ITRANS ICA, the ICD can be installed with the same credentials the current ITRANS ICA is using. An alternative approach is to log in with administrator credentials and install the CDA Digital IDs and ICD with those credentials. The server can then be operated under other non-administrator credentials, but the services will be able to access the CDA Digital IDs. In the future, new CDA Digital IDs will have to be added under the administrator account.

If you are not familiar with Windows Services, Google "Working with Windows Services". At the time of writing there is a good article here: <https://stackify.com/what-are-windows-services/>

To summarize:

- The ICD must run under the same account the CDA Digital IDs were installed under.
- The account should have rights to write files to the folder program folder of the ICD. The default folder is: C:\Program Files (x86)\CDA\ICD
- The account should have the rights to start and stop the ICD service.

See *ITRANS 2.0 Vendor Technical Reference 1.5* for advanced installation scenarios (see: www.cda-adc.ca/get)

3.3.1 Consider exporting existing CDA Digital IDs

If the ICD will run under a different user than the current ITRANS, it may be simpler to export the existing CDA Digital IDs. Existing CDA Digital IDs can be exported from a current user account and imported to a different user account. This may be simpler than retrieving new CDA Digital IDs for each dentist at the office.

To export certificates, login to the machine as the user with the certificates to be exported. In the Manage Use Certificates control panel, under personal certificates, shift-click to select the certificates you want to export, right-click and from the context menu choose All Tasks>Export. Follow the export wizard using the default settings. Select a location for the export file the import user will be able to access (e.g. c:\ drive root or USB key). All the certificates will be exported to a single file. Logout of Windows, and then login as the user you want to move the certificates to. Double-click the export file and Windows will launch the import wizard. Select installation under Certificates – Current User > Personal. The CDA Digital IDs will be installed, and accessible for that logged in user.

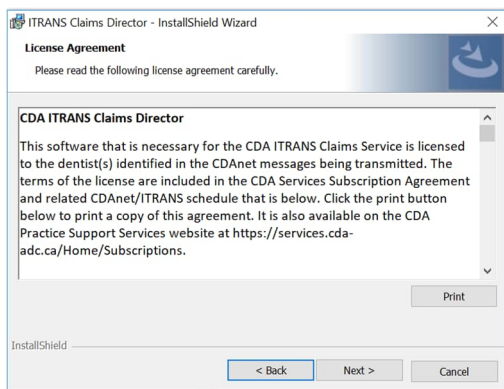
3.4 Install CDA Digital IDs

ITRANS 2.0 and the ICD software use the CDA Digital IDs. Install CDA Digital IDs on the computer that sends the claims. A CDA Digital ID is needed for each dentist that will be transmitting claims from the office.

3.5 Install the ICD

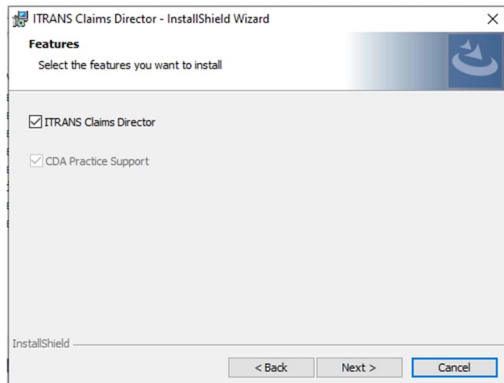
3.5.1 Run the ICD Installer

The installation wizard will display a number of screens. See the notes below for information about key screens.



License Agreement

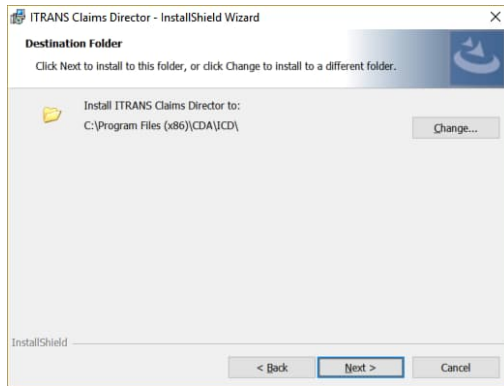
The license agreement for the ICD is part of the subscription agreement for CDAnet and ITRANS since the agreement is with the dentist.



Features

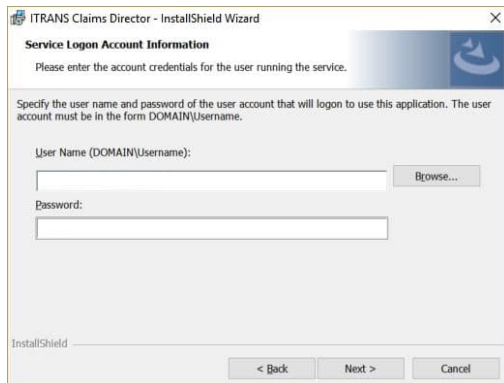
Select the features to install. Keep "ITRANS Claims Director" selected to install the ICD for claims services.

If not selected, only the CDA Practice Support app is installed, which provides the option to install CDA Digital IDs that may be used for CDA Secure Send when integrated into the PMS.



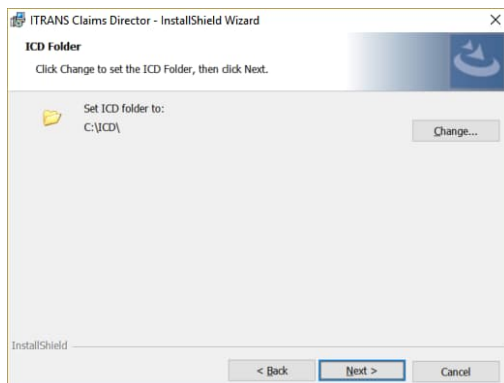
Destination Folder

This is where the program files of the ICD are placed – the defaults should be fine.



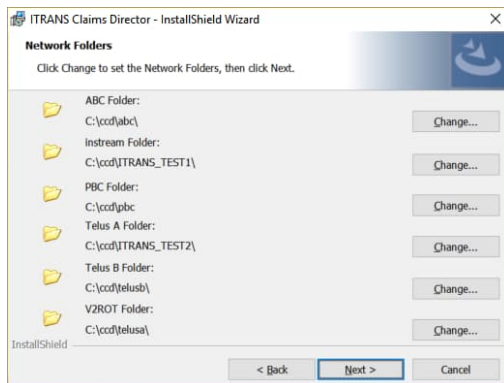
Service Credentials

Provide the credentials for the user account that has access to the CDA Digital IDs. Since the ICD runs as a service, it does not have to be the account of the logged in user.



ICD Folder

This is the folder that the PMS writes and reads CDAnet messages to and from.

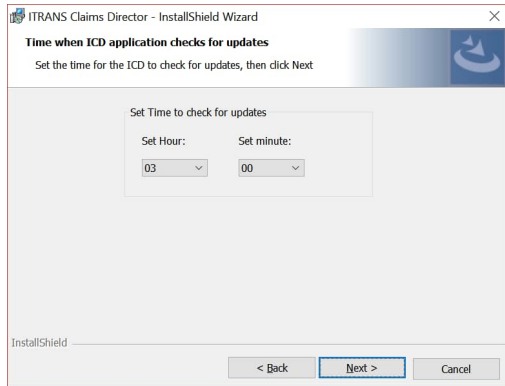


Network Folders

If the installation will be for offices only containing dentists, click Next without any changes.

If claims for non-dentist providers will be sent, then set the paths for the CCDWS network folders so the ICD knows where to direct CDAnet files for each network.

The last item, V2ROT, should point to the ICD directory. This is explained further below.



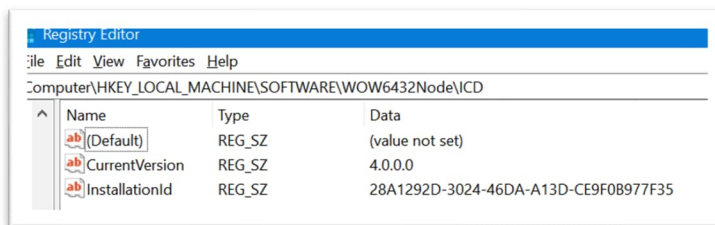
Auto Update Setting

Set the time for the ICD to check for updates.

Note, the computer must be on for the updating to occur—if the computer is shutdown at night, choose a time during the day.

During the installation, the following occurs:

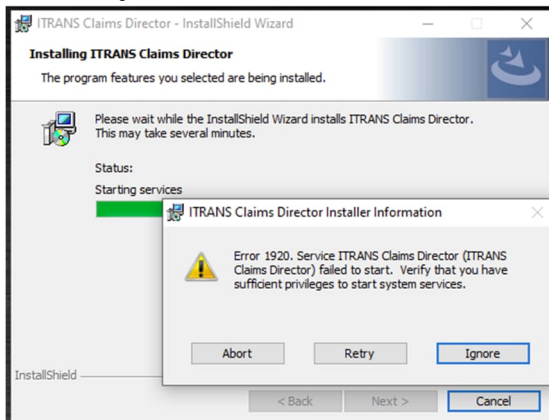
- The ICD is installed to run as a service under the credentials supplied during installation. The name of the service is ITRANS Claims Director.
- A unique ICD installation ID is created and documented in the ICD.ini file. This will help in troubleshooting issues. It is also installed into the Windows registry at this location:
Computer\HKEY_LOCAL_MACHINE\SOFTWARE\WOW6432Node\ICD



- The ICD software connects to CDA and downloads the latest version of the “Network-Claims Processor List” (N-CPL) from the location indicated in the ICD.ini file, the default is: C:\Program Files (x86)\CDA\ICD. This JSON formatted file is saved in the ICD directory as n-cpl.json and is available for you to use to set CDAnet network and claims processor settings—this is the integration aspect of ITRANS 2.0.

3.5.2 Services error

The following error appears during installation if either the username or password was entered incorrectly.

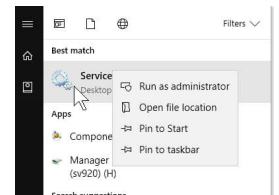


If this error is displayed:

- Click the "Ignore" button. The install process will complete without issue, but the service won't start until credentials are corrected.

To correct the credentials:

- Press the Windows key and type "services". When the Services app appears in the menu, right-click on it and select Run as Administrator using admin credentials.
- Find and open the "ITRANS Claim Director" service.
- Click the Log On tab, and then the "This account" radio button.
- Enter the credentials that will be used to install the CDA Digital IDs. Click OK.
- Click on the General tab and start the service.



If the service will not start, check that the account has rights to start/stop services:

- Navigate to Local Policies/User Rights Assignment
- Find "Log on as a service" policy and confirm you see account listed there.

3.5.3 Configure the PMS Application

The last step is to configure where your PMS application writes and reads the CDAnet files, which is a different location that used by the ICA from ITRANS 1. Now, all files are written to C:\ICD (if you are using the suggested folder structure) instead of the C:\ICA folder. Adjust your CDAnet network configurations so all networks point this this folder. The folder is identified in the ICD.ini file on this line: ClaimsFolder=C:\ICD\

3.5.4 Installation Summary

As a summary of the installation, following are the steps to be completed:

1. Identify the computer(s) that sends the claims—it will have the previous ITRANS ICA running.

2. Install CDA Digital IDs for each dentist at the office under the user account that is running the ICD service.
3. Install the ICD on this computer.
4. Configure your PMS software to direct claims to the ICD folder (C:\ICD\ by default).

Claims can now be sent, and receiving an appropriate response confirms the correct set-up for claims transmission. To confirm the de-identified claims are being transmitted for help desk and self-serve access via the CDA PSS website, check the ICD.log file in the folder C:\ICD\ that logs the successful (or unsuccessful) transmission of the de-identified message. The sample log entries below show a successful upload to the ITRANS storage:

```
2019-01-21 3:22:33 PM - Start Claim De-Identification
2019-01-21 3:22:33 PM - Claim De-Identification completed
2019-01-21 3:22:33 PM - Writing payload to queue
2019-01-21 3:22:33 PM - Queue write completed
2019-01-21 3:22:33 PM - Sending Payload _response.022 to ITS
2019-01-21 3:22:34 PM - Response from ITS for Payload _response.022 :
                        b26ba6397aa91d9e165f7a31ff57b7bb52ef3ff9cd9cb7d280c82082b9410ef1 Status code - OK
2019-01-21 3:22:34 PM - Deleting processed file _response.022
2019-01-21 3:22:34 PM - _response.022 file deleted
2019-01-21 3:22:34 PM - Completed sending Payload _response.022 to ITS
```

The difference with ITRANS 2.0 from ITRANS with the ICA is that claims travel directly from the dental office to the network or carrier. Unlike the original ITRANS, they no longer go to an intermediary data centre. Note that the network routing is now controlled by the ICD and the N-CPL, not the network setting in your PMS.

3.5.5 Silent Installation

New with Version 4.1, the Windows ICD can be installed silently without any user interaction. This option removes the need for user input during the installation by allowing all configuration options to be specified in a command line format. Dental software vendors can push the ICD to target systems for unattended installation.

Full details including descriptions of supported install variables are available in the document *ITRANS 2.0 Technical Reference 1.5*. This document and the most recent ICD installer are available at www.cda-adc.ca/get.

4 Testing ITRANS 2.0

The functional aspects of ITRANS 2.0 can be tested without actually sending any transactions from the computer being tested. This is convenient because there is no need to ensure the needed components are all configured for the test environment, this includes:

- CDA Digital IDs that match the test dentist/test office that have been issued from the test certificate authority (test CA)
- The ICD.ini is configured for the test environment.

4.1 Functional Testing

The ITRANS ICD has the following functions you may wish to test:

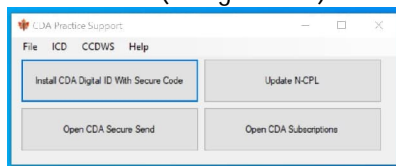
1. N-CPL Updating: The ICD connects to CDA (N-CPL) to query and update the Network-Claims Processor List.
2. Message sending: The ICD is processing messages, finding the correct CDA Digital ID and sending them to the destination network.
3. Message storage: The ICD connects to CDA (ITRANS Storage) to transmit de-identified CDAnet messages to CDA for the Help Desk, etc.

Message switching and message storage are tested by sending test messages from your PMS using the test dentist profile. The N-CPL updating can be tested by running the command line update for the N-CPL.

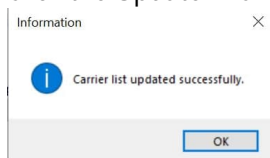
4.1.1 Test N-CPL Updating

This test ensures the ICD is properly connecting to the N-CPL host site to receive updates from the N-CPL. This can be done with the CDA Practice Support app, or by running a command line command. To use the CDA PS app, do the following:

1. Double-click (or right-click) the CDS PS app in the tray – the app interface will display:



2. Click the Update N-CPL button. If successful, the following will display:



Each of these indicate the ICD was able to connect to CDA and check for an update.

This can also be accomplished by running the following from the command line:

"C:\Program Files (x86)\CDA\ICD\ITRANS Claims Director.exe" --getncpl

Note that the path and executable are delimited by quotation marks, and the getncpl parameter is preceded by two dashes. The double-quotation marks shown above are required. When run, the downloaded n-cpl.json file will automatically replace the version currently onboard.

To run the command line, while the ITRANS Claims Director service is running, open a Command Prompt window and type (or paste):

```
"C:\Program Files (x86)\CDA\ICD\ITRANS Claims Director.exe" --getncpl
```

Look at the date created for the file, it should reflect the date/time when you executed the command and the file was retrieved. This shows the ICD is successfully connected to the N-CPL host.

The downloaded file, n-cpl.json, is available to the PMS software, so the carrier settings in the PMS can be entirely configured with the n-cpl.json. Since the ICD changes for changes to the network and claims processor list each time a transaction is processed, up-to-date network and claims processor settings are always available on-board for all CDAnet carriers. The PMS software can use this to have all CDAnet carriers with their specific CDAnet message support always available, eliminating the need for offices to manually add new carriers, or update changed carrier configurations. The details of the n-cpl.json format are available in the ITRANS 2.0 Technical Reference Manual.

4.1.2 Test Message Sending

The goal of testing message sending is to send a properly formatted CDAnet claim message from a test dentist to the live claims processor system and expect to have the claim rejected because either the dentist or the patient does not exist on the claims processor system. Receiving the rejection will show the ICD is functioning properly, is able to find the dentist CDA Digital ID and is able to correctly send the message to the destination system.

The PMS system is not involved in this test, the claim can be provided to the ICD by pasting it into the ICD folder.

Following are the steps to complete this test:

Create the test claim message (input file)

The contents of the PDF comment on the right is a properly formatted CDAnet claim message. Open the comment, select all the text and paste into an empty Notepad file and save it to the desktop with the name input.001.

Install a CDA Digital ID for the Test Dentist

The test dentist in the claim message is:

Name: A Dentist

UIN: 530123401

Office: 1234

Copy the highlighted string below, paste into a Notepad file, and save to the desktop with file-name INPUT.01

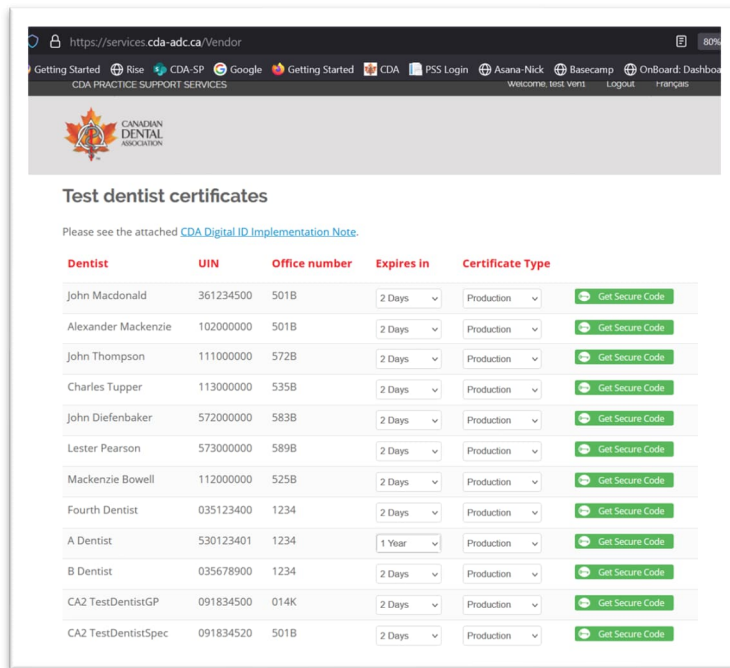
```
CDANET14
9000300401000011TS1200556X0000153012340112345
30123401
1234 00PLAN012 AB123C4G 001 19600412Burns
Lisa 2 019600412Burns Lisa
124 - 1500 Rue Montreal
QCH1C2D4 F03N0300100000000
X00000000X00000000N001012011999010100 002750
000000 000000X 002021021999010100 008725 000000
000000X 003212231999010126MOD 010760 000000
000000X 00
```

Get the Dentist digital ID from the CDA test certificate page for vendors; login here:

services.cda-adc.ca

If you do not have credentials to access this page, contact CDA at cdanet@cda-adc.ca.

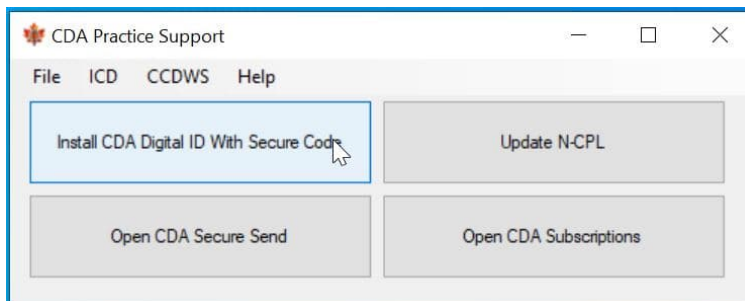
Once logged in, you'll see the screen below. For the row A Dentist, change the expires value to 1 year, leave the type on Production, and click the Get Secure Code Button. On the next screen, click Copy to copy the displayed Secure Code.



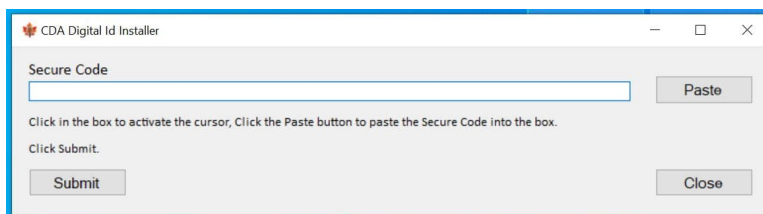
The screenshot shows a web browser window with the URL <https://services.cda-adc.ca/vendor>. The page title is "Test dentist certificates". Below the title, there is a link to the "CDA Digital ID Implementation Note". The main content is a table with the following columns: Dentist, UIN, Office number, Expires in, Certificate Type, and a "Get Secure Code" button.

Dentist	UIN	Office number	Expires in	Certificate Type	Get Secure Code
John Macdonald	361234500	501B	2 Days	Production	Get Secure Code
Alexander Mackenzie	102000000	501B	2 Days	Production	Get Secure Code
John Thompson	111000000	572B	2 Days	Production	Get Secure Code
Charles Tupper	113000000	535B	2 Days	Production	Get Secure Code
John Diefenbaker	572000000	583B	2 Days	Production	Get Secure Code
Lester Pearson	573000000	589B	2 Days	Production	Get Secure Code
Mackenzie Bowell	112000000	525B	2 Days	Production	Get Secure Code
Fourth Dentist	035123400	1234	2 Days	Production	Get Secure Code
A Dentist	530123401	1234	1 Year	Production	Get Secure Code
B Dentist	035678900	1234	2 Days	Production	Get Secure Code
CA2 TestDentistGP	091834500	014K	2 Days	Production	Get Secure Code
CA2 TestDentistSpec	091834520	501B	2 Days	Production	Get Secure Code

Next, in the Windows Tray, double-click the CDA Practice Support icon; the app will launch.



The button highlighted above. When the Window below is displayed, click Paste. Then click Submit.



When the digital ID is installed, a confirmation message will be displayed.

Send the Claim Message

You are now ready to send the claim message. You do this by pasting the file "input.01" into the folder c:\ICD. What happens is the ICD will immediately process the claim, and you will see the file is renamed to "_nput.01". Next, almost instantly, you will see the response from the claims processor in the form of a new file in the directory named "output.01". Receiving this file means the process worked. The ICD saw the input file, found the related CDA Digital ID, established a connection to the claims processor network, sent the file and received the response. The system worked.

The ICD creates a detailed log for every action it takes. Find the log in the same ICD folder. The logs have the naming convention: ICD_Log_YYYYMMDD.log.

If the above process did not appear successful, inspect the log file. One thing to check is the input filename was input.01, not, input.01.txt. Notepad will automatically add the ".txt".

4.1.3 Testing Message Storage

The ICD de-identifies each outgoing and incoming message of patient information and then securely sends it to the ITRANS storage system (ITS). Dental offices can log onto the CDA PSS website and see the CDAnet messages that have been sent and received, and this can be a valuable tool in troubleshooting claims issues.

To verify the ICD is able to send the message to the ICD, inspect the ICD log in the c:\ICD folder. You may see several log files, choose the one with the most recent date. After you've completed sending and receiving message above, open the log file. Near the end of the file, you should see entries like those highlighted below:

2023-29-07 02:56:31 PM - INFO - ICD - The Claim was sent to the ITS successfully.

2023-29-07 02:56:33 PM - INFO - ICD - The Response was sent to the ITS successfully.

If you do not see these, inspect the log for information on what happened. The CDAnet Help Desk (1-866-788-1212) can help you troubleshoot any issues.

Try the CDAnet Message Parser

The CDAnet Message Parser application will parse any CDAnet message into its fields. Download the parser from: <https://public.3.basecamp.com/p/SwN4TNHHcYgz7CzQz1feQdni>

The screenshot below shows the result of parsing the test claim message above. To parse an output file received as a response, any comma separated fields at the front of the CDAnet message must be removed before parsing.

CDAnet Message Parser

About Français

Data Entry

CDANET14 9000300401000011TS1200556X0000153012340112345301234011234 00PLAN012 AB123C4G
 001 19600412Burns Lisa 2 019600412Burns Lisa 124 - 1500 Rue
 Montreal QCH1C2D4 F03N0300100000000 X00000000X00000000N001012011999010100
 002750 000000 000000X 002021021999010100 008725 000000 000000X 003212231999010126MOD 010760
 000000 000000X 00

Parse

Parsed View

Field Name	Field Value	Field Description
A01	CDANET14	Transaction Prefix
A02	900030	Office Sequence Number
A03	04	Format Version Number
A04	01	Transaction Code
A05	000011	Carrier Identification Number
A06	TS1	Software System ID
A10	2	Encryption Method
A07	00556	Message Length
A08	X	Materials Forwarded
A09	00001	Office Sequence Counter

Save

Validation

Validated with No Errors

CDAnet message parser application output

5 Integration: Make ITRANS 2.0 Work for You

As indicated above ITRANS 2.0 provides the N-CPL JSON file that you can integrate into your PMS application. This feature is based on a commitment by CDA to continue providing this feature over the long term so you can confidently rely on it to bring new features and benefits to your software. Integrating the N-CPL will enable:

- Automatic configuration for claims processors—the network and transaction information can be authoritatively received on demand via the N-CPL, both automatically as messages are processed, and on-demand with a command line.
- For claims for secondary benefits (COB), the N-CPL includes text messages you can display provided from CDA on whether the secondary carrier will accept secondary claims electronically. Further, the COB capabilities for each claims processor has been coded, and with the addition of some logic, you could provide accurate messaging on a per claims basis on whether the secondary benefit claims can be transmitted—for the user, this takes all the guess work of the question, “Can I send the secondary claim electronically?”. See Appendix B of the Technical Reference document for all the details.
- Efficiently request all outstanding transactions. There is more complexity in retrieving outstanding transactions that meets the eye, especially when some claims processors use more than one network. The N-CPL.JSON file contains an array of BINs, the “rot_bins” element, to efficiently receive all outstanding CDAnet messages from all possible locations.
- The N-CPL JSON file is able to contain the mailing address for CDAnet Claims Processors where paper claims are to be mailed. We will be gathering the information for display to end users, and perhaps for you to print on claims forms when a paper claim must be sent. The purpose is to save dental offices staff the trouble of hunting for addresses, and make them available right in their PMS software.

For all the technical details, please refer to the ITRANS 2.0 Technical Reference documentation.

5.1 What’s Next?

Now that ITRANS 2.0 is available, PMS vendors should transition their processes to install this version of ITRANS. The on-demand network-carrier list offers value to PMS vendors with efficient configuration changes and other features, and we hope it will be integrated into PMS system to bring more value to dental offices and savings in customer support to PMS vendors. CDA is committed to maintaining the service of the n-cpl JSON file indefinitely.

CDA will eventually retire the current version of ITRANS with an anticipated timeframe of 24-30 months. At that time, the ICA communication driver will also be retired. In the coming months, CDA will be requesting your feedback on this timeline as well as other opportunities you see in bringing more value to your customers and our members.

6 ITRANS 2.0 and Non-dental Claims

Two scenarios are covered here:

1. You as a software vendor want to integrate the ITRANS 2.0 N-CPL into your software for auto-carrier configuration and updates, but you also have offices (customers) who aren't dentists and don't use ITRANS – what does this mean?
2. You have in your customer base “hybrid” offices that have both dentists and non-dentists who send claims – denturists and/or independent dental hygienists. How does that work with ITRANS only sending dentist claims, and using CDA Digital IDs when the other providers don't?

The answer to both these scenarios is essentially the same. The ITRANS ICD will recognize non-dentist UINs. When it does, it forwards the claim to the CCDWS software. The CCDWS software then sends the claim to the destination claims processor network establishing a secure connection using the vendor certificate rather than the CDA Digital ID used for provider authentication in ITRANS.

What this means is:

- When installing your software in a non-dentist office (scenario 1 above), install the ITRANS ICD and send all claims from your software to the ICD. The ICD will forward the claims to the CCDWS. The benefit is you can still use the N-CPL.json file for carrier configuration. One difference is, without claims going to the CDA ITS (a dentist-only service), the N-CPL won't know when to auto-update. To update the N-CPL, there is the command line option, and you could add a “update carrier list” button to your software, or you could have the command line auto-execute periodically to receive any carrier updates. This is exactly why the command line option is available.
- When installing your software in a hybrid office (scenario 2 above), you also install the CCDWS (now not needed for dentist only offices) and configure the CCDWS network folder locations in the ICD when installing the ICD (or by editing the ICD.ini file). Now any non-dentist claim will be handed off to the CCDWS for transmission to the claims processor.