

Issuer Submitter – Create a TPA-hosted EDGE Server Request

Introduction

The EDGE server video series provides both issuers and Third Party Administrators, video demonstrations on how to complete the required tasks as part of operating an EDGE server. These videos will guide you through all of the tasks you need to complete as part of registering for an EDGE server, provisioning an EDGE server, and processing files on your EDGE server. As you can see, the videos are grouped depending on whether you are operating an Amazon EDGE server or On-Premise EDGE server, and also whether your server will be, self-hosted or hosted by a TPA. Issuers and TPAs operating an Amazon EDGE server should access and view the videos listed here. Issuers and TPAs operating an On-Premise EDGE server should access and view the videos listed here. All of these videos and their accompanying job aids can be found on REGTAP.

Hello and welcome to this video tutorial on how an Issuer Submitter will submit a request for an EDGE Server through the EDGE Server Registration site. This video is intended for Issuer EDGE Registration Request Submitters and will demonstrate how to submit a request for a TPA-hosted EDGE server. The steps for an Issuer EDGE Registration Request Submitter to submit a request for a self-hosted EDGE server, Issuer Approver and TPA Submitter will be covered in separate video tutorials

All the activities covered in this tutorial will be performed through the EDGE Server Registration site. For more information on accessing the EDGE server registration site, reference the EDGE Server Registration – Access Site video tutorial and the EDGE Server Registration Job Aid on REGTAP.

Step 1:

- Once you have logged in and accessed the EDGE server home screen, click “Create Edge Server Request” button in top right corner to create a new request.
- Ensure this is the first request for your organization, as any new request will be rejected if there is an existing active request for the same HIOS Issuer ID.
- The registration site only allows one server request per Issuer ID.

Step 2:

- On the EDGE Server Request screen, first select your HIOS Issuer ID from the Issuer-ID Name dropdown menu and then enter your EDGE server point of contact information. **Two POCs are required to be provided here.**
- If additional POC information is required, you can click the Additional POCs link at the bottom to open an additional set of POC information fields.

Step 3:

- Since this is a TPA-hosted request, select the Yes radio button asking if this will be a TPA hosted EDGE server. Next, click the Select TPA dropdown menu. A list of HIOS-registered TPAs will appear in the dropdown, sorted by their HIOS ID. Select the ID for the correct TPA you have agreed with to host your server.
- Since this is a TPA-hosted request, the request TPA will enter the remaining server details in the fields seen below. Issuer Submitters will not enter any additional server information at this point. Once the Issuer Submitter selects the Yes radio button indicating the server will be hosted by a TPA, the server detail fields below will be disabled.

Step 4:

- After entering all the appropriate TPA information, you will then need to upload the Issuer Attestation for the request. First, download the template by selecting the **Download Attestation Template** button.

Step 5:

- A pop-up window will appear asking you to download a PDF document. Download the template and print it out. Once reviewed, sign the agreement, scan it into your computer and save the document for uploading.
- Before uploading the Issuer Attestation, you will need to click the Save button to save the current request. Prior to saving, the Upload Attestation button will be disabled.

Step 6:

- After saving, scroll to the bottom of the request screen and click the **Upload Attestation** button.

Step 7:

- In the Upload Attestation window, click Browse and select your saved and signed Attestation agreement. Once attached, you will click Upload Attestation button.

Step 8:

- Once the Attestation is uploaded, you will see a File Uploaded Successfully message.

Step 9:

- Upon uploading the file, you're ready to submit the request.
- Click the **Submit Request** button.

Step 10:

- Once submitted, you will be taken back to your homepage.
- The Request will be sent to your organization's Issuer Approver for approval.
 - NOTE: You may need to coordinate with your organization's Issuer Approver outside the system, to ensure timely approval of the request.
 - NOTE: Once approved by your organization's Issuer Approver, the request will be sent to the selected TPA's inbox to enter the appropriate server details.



Conclusion

This completes the tutorial on how Issuer EDGE Registration Request Submitters will submit a request for a TPA-hosted EDGE Server through the EDGE Server registration site. Additional resources can be found on REGTAP and for EDGE Server support, please send all questions to CMS Help Desk by emailing: CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515.