EDGE Server File Processing

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 to upload enrollee and claims files to the AWS S3 bucket and generate outbound reports. This video cast is intended for issuers and TPAs using Amazon EDGE Server. Before starting this video tutorial you should have an Amazon EDGE server connected and running. If this is not the case, please refer to the job aids and accompanying video tutorials on how to register for and provision and Amazon EDGE server – EDGE Server Registration Job Aid and Amazon EDGE Server Provisioning Job Aid.

File processing is automatically initiated when a file is uploaded to an S3 bucket and the Amazon EDGE Server is started. Amazon S3 service authentication, authorization and SSL/TLS encryption, and Server Side Encryption at rest policies are used to protect issuer data being transmitted between the Issuer EDGE server and source/target S3 buckets.

Step 1:

- To begin uploading files to your EDGE server, Amazon EDGE issuers will first log into your Amazon Web Services account.
- In order to avoid continuous usage charges for a server instance, Issuers have the ability to "Start" and "Stop" a server instance. This prevents a server from running and incurring cost when it is not being used.
- Before processing your files, please remember to "Start" your server instance to ensure the server is running. If your server is already running, you can skip these steps.
- To start a server instance, from the AWS homepage, click **EC2** from the menu at the top left hand side of the screen.

Step 2:

- Next, click **Instances** at the top left hand side of the screen, and from the list of server instances, select the box next to your server instance.
- Once you have selected your server instance, click the **Actions** dropdown menu at the top of the page and then select Start.
- Issuers will receive a notification message asking them to confirm. Issuers should click **Yes**, Start in the window.
- File processing is automatically initiated when a file is uploaded to an S3 bucket and the Amazon S3 is started.

- Amazon S3 serivce authentication, authorization and SSL TLS encryption and Server Site Encryption at Rest policies are used to protect issuer data being transmitted between the issurer, Edge server and Source Target S3 buckets.

Step 3:

- Once you've confirmed your server instance is "Started" (running), from the AWS Home Page, access your AWS S3 bucket by clicking **S3** located in the Storage and Content Delivery sub section of the menu.
- Within the Amazon S3 bucket, issuers will find the following folders:
    o   Archive folder for storing files
    o   Backup folder for storing backup files
    o   Inbox folder for uploading files
    o   Logs
    o   Outbox folder for locating outbound reports

Step 4:

- Next, access your inbox by selecting the **cms.edge.ingest.inbox** from the list of S3 Buckets.
- Next, select your Issuer ID from the displayed list. There may be multiple Issuer IDs tied to the AWS account.
- From the inbox screen, you will see that your Inbox folder is empty as files are moved to the archive folder after processing. To begin uploading files, first, click the **Upload** button at the top left.

Step 5:

- In the Upload window, you can now begin attaching files. Click the **Add Files** link to select locally saved files to upload.

Step 6:

- In the **Choose File to Upload** window, select the enrollment or claims files to upload that are saved locally on your computer.
- Once all files are attached for upload, click the **Set Details** button at the bottom of the screen.
- In the Set Details window, select the Use Server Side Encryption checkbox. This will ensure your uploaded files are encrypted on the server.
- If you do not enable the Server File Encryption noted in Step 9, and instead, immediately click Start Upload after attaching your file, file upload will fail and you will receive the following error message. If this occurs, you will have to re-attach the file and upload again. Please remember to enable the server file encryption in the Set Details menu.
- After enabling encryption, click the **Start Upload** button.

Step 7:

- After uploading the files, you will be taken back to your inbox and will see the download progress of your files. Once complete, you will see a green check mark with a status Done on the right side of the screen under the Transfers section. The uploaded files will be listed on the left in the inbox.

- If you have enabled the SNS email notification on your account, you should receive an email notification once a file is picked up for processing as seen here. Please refer to the Amazon EDGE File Processing Email Notification Job Aid and video tutorial for more information on setting up this service.

Step 8:
- The page will refresh and once the file is cleared and the folder is empty, this will indicate that the file has processed completely and the corresponding outbound reports have generated. Once complete, click the **All Buckets** link in the top left to return to the S3 bucket main screen.

Step 9:
- From the S3 bucket list, select the **cms.edge.ingest.outbox** link to open the Outbox folder.
- In the next screen, select your **Issuer ID** from the displayed list.

Step 10:
- In the Outbox screen, issuers will need to identify the outbound report that corresponds to the uploaded file by the time/date stamp and the file naming convention. Issuers can identify the type of outbound file produced by the 2 letter code provided in the standard outbound file naming convention. Please refer to the accompanying Amazon EDGE Server File Processing Job Aid to see a complete list of file types and corresponding 2 letter codes.
- To match an outbound report to the inbound report, issuers will need to download the file produced, open the file and look for the inbound File Identifier. To download a report, select the report by clicking the checkbox to the left and then right-click. Select Download from the pop-out menu. In this example, the EDGE Server Enrollee Detail Report is selected by identifying the ED code in the file name and the time/date stamp that matches the day and time you uploaded the file.

Step 11:
- In the pop-out window that displays, right-click the Download link and then select **Save Link as**… in the pop-out menu. This will open a separate window to save the outbound report file locally to your computer. Due to the large file size, it is recommended to always download and save the file to open it rather than opening the file directly in the internet browser.
- In the Save As window, choose the appropriate file location for the outbound reports and save the files locally to your computer.
- Once saved, you will be able to open and review the outbound reports to validate the data is correct and there are not errors.
- If you have enabled the SNS email notification on your account, you should receive an email notification once a file is loaded to your outbox. Additionally, if processing production files, a notification will also be sent to CMS that a file is available. Please refer to the Amazon EDGE File Processing Email Notification Job Aid and video tutorial for more information on setting up this service.

Step 12:

- Once you receive the final notification that reports were sent to CMS for the files you have processed, you can shut down your server instance in order to stop incurring charges for having the server running.
- To stop a server instance, from the AWS homepage, click **EC2** from the menu at the top left hand side of the screen.
- Next, click Instances at the top left hand side of the screen, and from the list of server instances, select the box next to your server instance

- Once you have selected your server instance, click the **Actions** dropdown menu at the top of the page and then select Stop.
- Issuers will receive a notification message asking them to confirm. Issuers should click **Yes, Stop** in the window.

Conclusion

This completes the Amazon Edge File Processing Module. Additional resources can be found on Regtap and For EDGE server support, please send all questions to CMS Help Desk email: CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515.