PC-ACE Pro32 General Setup

The PC-ACE Pro32 General Setup document provides additional information to setup PC-ACE Pro32 to be used for durable medical equipment (DME) transactions exchanged with CEDI. This document will cover the following topics:

- Backing Up PC-ACE Pro32
- User Accounts
- Submitter Information
- Ordering Provider Information
- Billing Provider Information
- Payers (Insurances)
- Patient Information
- Communication Setup
- Option for Electronic Remittance Advice

PC-ACE Pro32 is designed for both Institutional (Medicare Part A, or hospital) and Professional (Medicare Part B, or office visits, and/or DME) billing. Since this is a DME support document, we will not be covering Medicare Part A or Part B functions.

This document is intended as a help guide for setting up the PC-ACE Pro32 software. It is not intended to replace the general help (accessible by the F1 key) or specific item help (accessible by right-clicking or selecting the F2 key on a specific item) functions, or the PC-ACE Pro32 User Manual itself. For help with any questions not covered here, please consult these documents.

Whenever you start PC-ACE Pro32, many of the menu options will require you to sign on. Once you sign on for one item, it will not prompt you to sign on again unless you either close the program or select L**ogout Current User** from the **Security** menu item.

The sign on information can be located in the PC-ACE Pro32 Readme File downloaded with the full install of the PC-ACE Pro32 software.

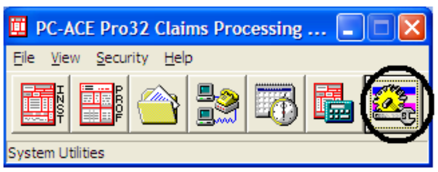
Please refer to the PC-ACE Pro32 User Guide for more sign on information. The PC-ACE Pro32 User Guide can be found on the CEDI Web site www.ngscedi.com under Resource Materials or under Software Downloads and Documentation.

The current version is 2.16.0.100. To find out what version you are running, select **Help** from the PC-ACE Pro32 main menu, and drop down to **About PC-ACE Pro32**.

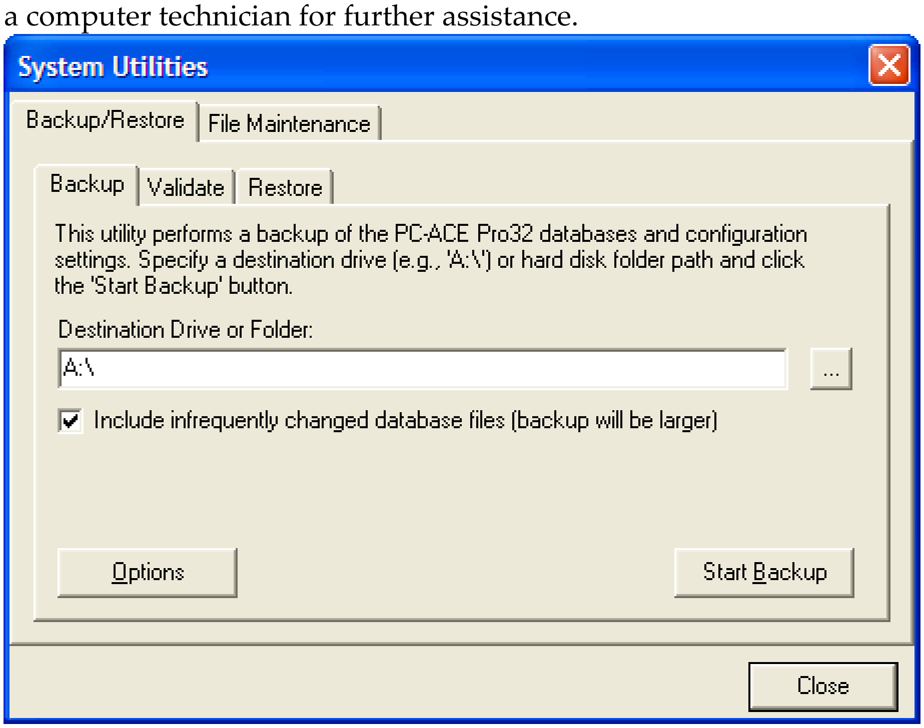
Backing Up PC-ACE Pro32

- PC-ACE Pro32 will automatically ask you to make a backup every time you exit the software (unless you make a backup immediately before exiting). It is recommended that a backup be done on a regular schedule, i.e. daily or weekly.
- **Always make a backup before updating the software to a new version.**
- Do not restore a version of PC-ACE Pro32 older than the one currently in use on your computer as this will cause problems.
- When moving from one computer to another, it is always best to make sure both computers have the same version of PC-ACE Pro32 before making and restoring backups.
- Use the F1 help document for further instructions.

In order to make a backup copy of PC-ACE Pro32, select **System Utilities** from the PC-ACE Pro32 main menu.



The **Systems Utilities** menu will open to select the location where a backup will be saved. The button with three dots opens a general Windows browse dialogue box to select a location. This is a folder location only – the file name will be set by the software. The exact location will be up to you, but a USB flash drive makes a good storage location in case your computer crashes. Consult a computer technician for further assistance.



Once you have chosen a location, select **Start Backup**. It will tell you when it has completed successfully.

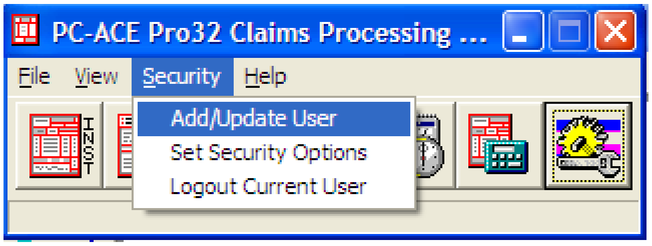
Select **Close** to return to the PC-ACE Pro32 Main Menu.

Note: To restore a backup copy of PC-ACE Pro32, return to this same area of the software and select the **Restore** tab.

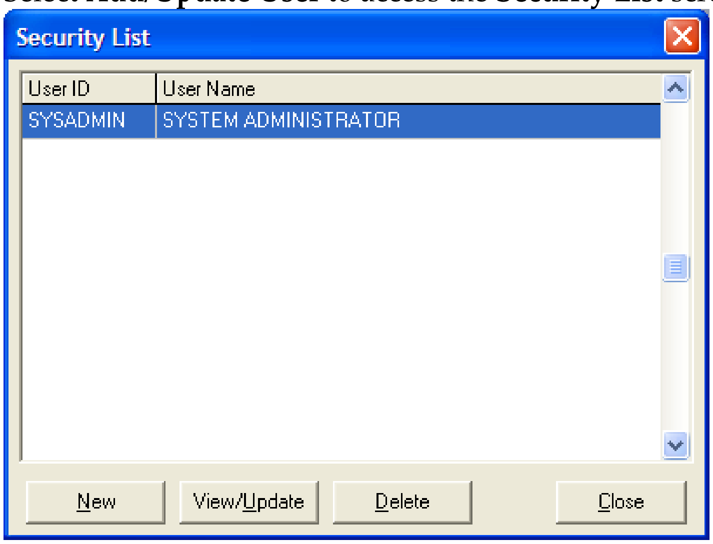
Set Up User Accounts

User accounts can be set up for people who will be accessing PC-ACE Pro32 for the purpose of entering and sending claims, adding patients, reviewing claims that have already been sent, etc.

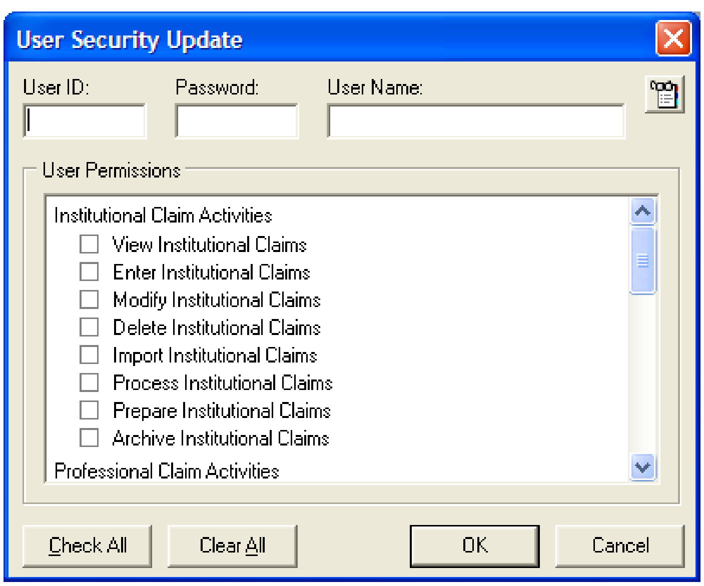
Select **Security** from the PC-ACE Pro32 main menu.



Select **Add/Update User** to access the **Security List** screen:



Select **New** to add a new user.



Enter the user information as appropriate.

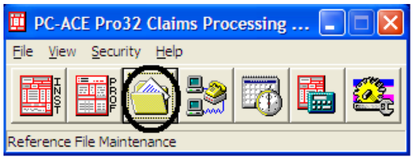
Be sure to scroll down and allow the user to have access to everything the user will need to conduct business.

Select **OK**.

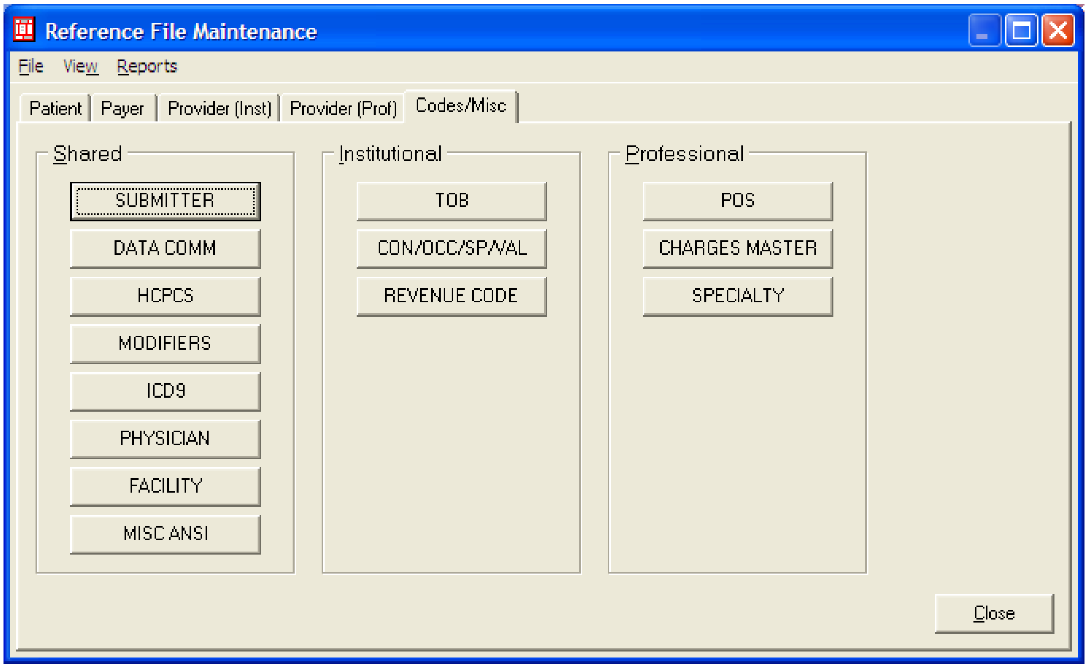
Repeat for additional users, or select **Close** to return to the PC-ACE Pro32 main menu.

Setting up a Submitter ID

To enter submitter information, select **Reference File Maintenance** from the PC-ACE Pro32 main menu.

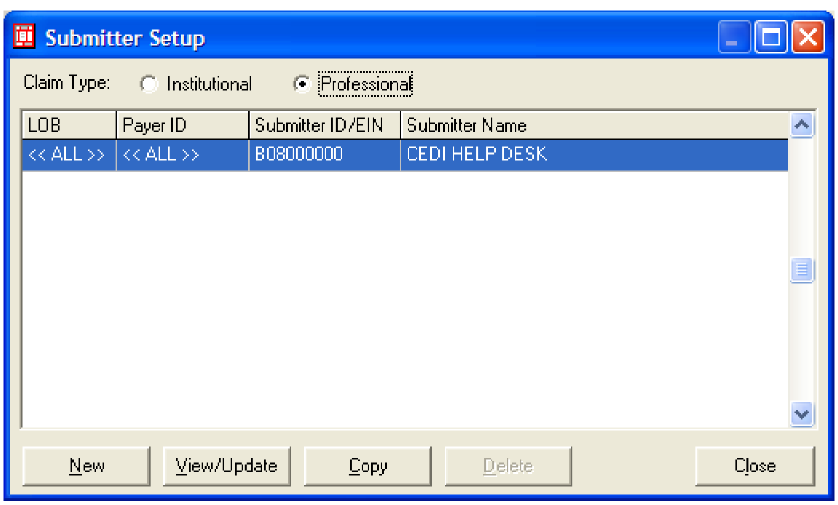


Select the **Codes/Misc** tab.

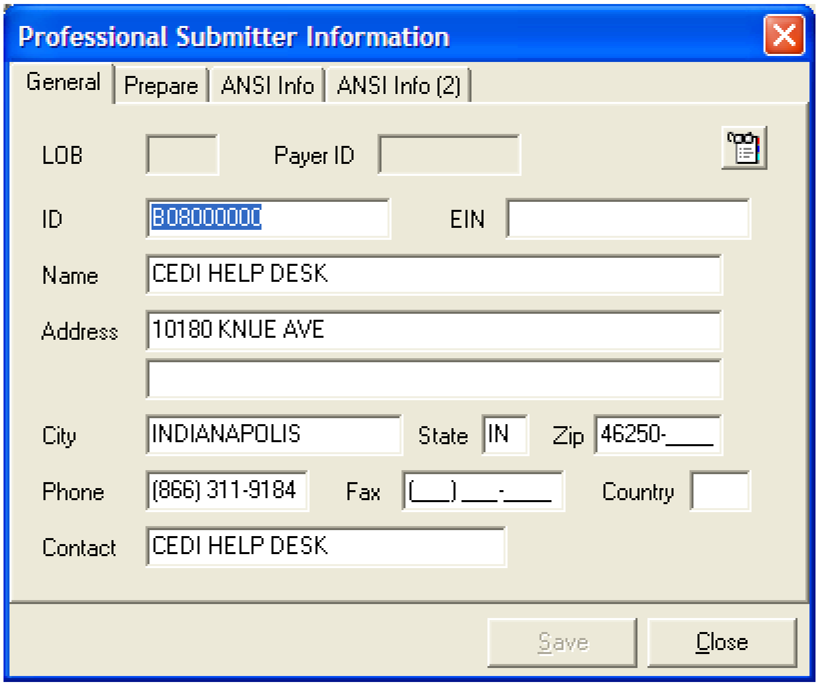


Select the **Submitter** option to enter the Submitter ID assigned by CEDI and other information pertaining to the submitter.

On the **Submitter Setup** screen, select the **Professional** radio button.



Select the **View/Update** button.



The Professional Submitter Information screen has several tabs. Only information on the **General** tab will need to be updated with your CEDI submitter information.

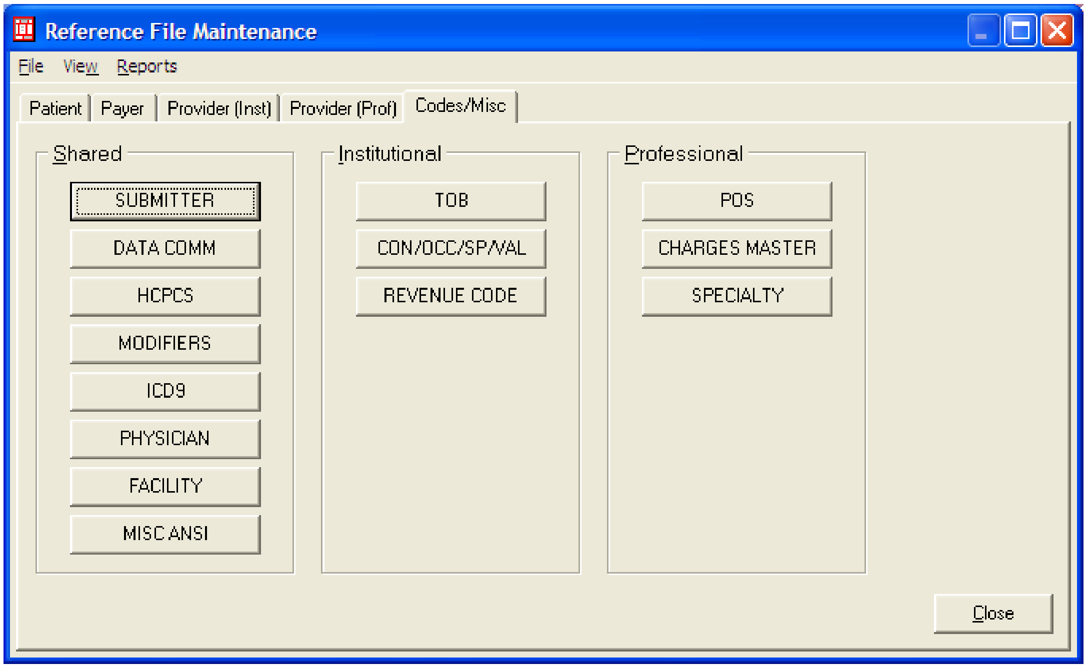
LOB: This is left blank.
Payer ID: This is left blank.
ID: Enter the Submitter ID assigned to you by CEDI. This number should start with an A, B, C, or D. It is also called a Trading Partner ID.
EIN: This is left blank.
Name: Enter the submitter name enrolled with CEDI.
Address: Enter the physical address location for the submitter/Trading Partner.
Phone/Fax: Enter the phone and fax number for the submitter/Trading Partner.
Contact: Enter the contact person.
Country: This is left blank.

The other tabs will most likely only be used when instructed to by CEDI technical support.

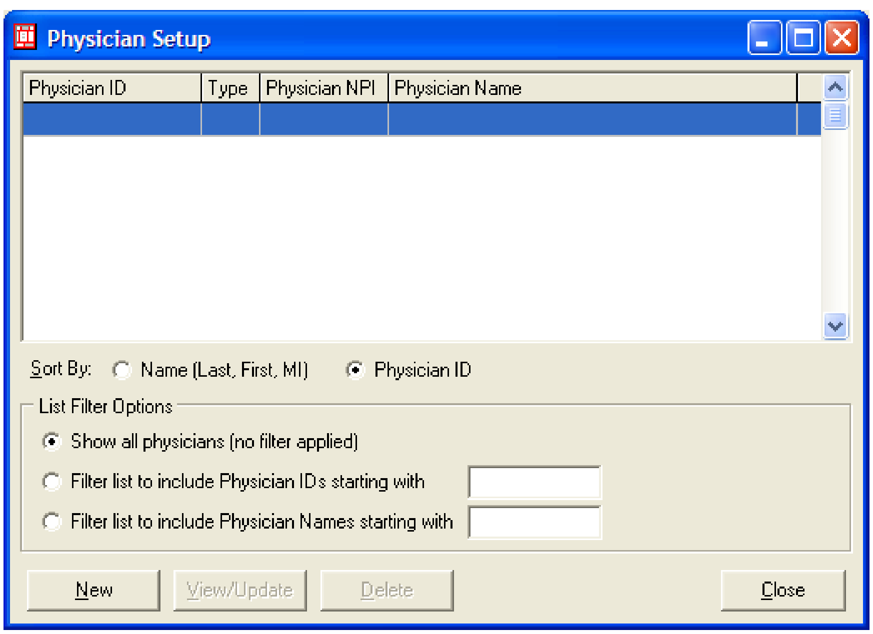
Select **Save** and **Close** to return to the **Codes/Misc** menu.

Setting up Ordering Provider Information

To enter ordering provider information, under **Reference File Maintenance**, select the **Codes/Misc** tab.

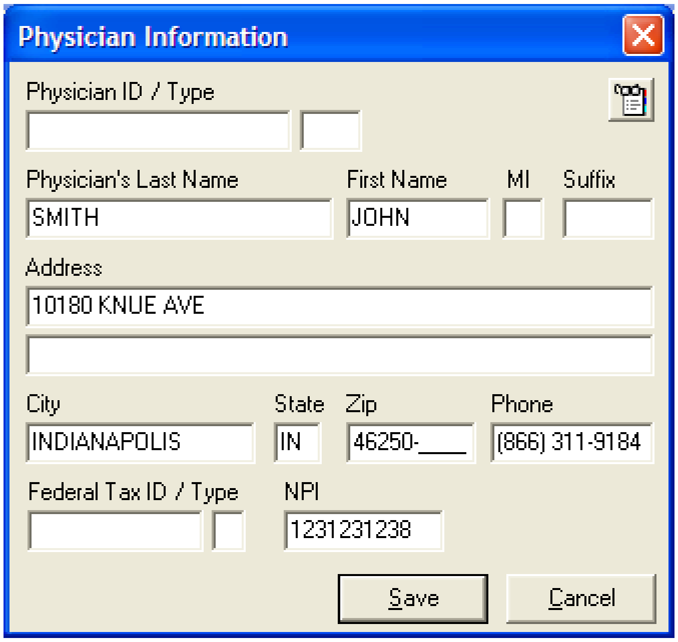


Select the **Physician** button to setup Ordering Providers. For DME, every charge line must have an Ordering Physician with an NPI indicated.



Select **New** to add an Ordering Provider.

Physician Information for the Ordering Provider:



Physician ID / Type:	This is left blank.
Physician's Name:	Enter the Physician's name in the relevant fields.
Address:	The address and telephone number should be entered for the physician.
Federal Tax ID/Type:	This is left blank.
NPI:	Enter the physician's NPI. (PC-ACE Pro32 will validate that the NPI is valid.)

Select **Save** when finished.

Repeat as needed to add more Ordering Providers.

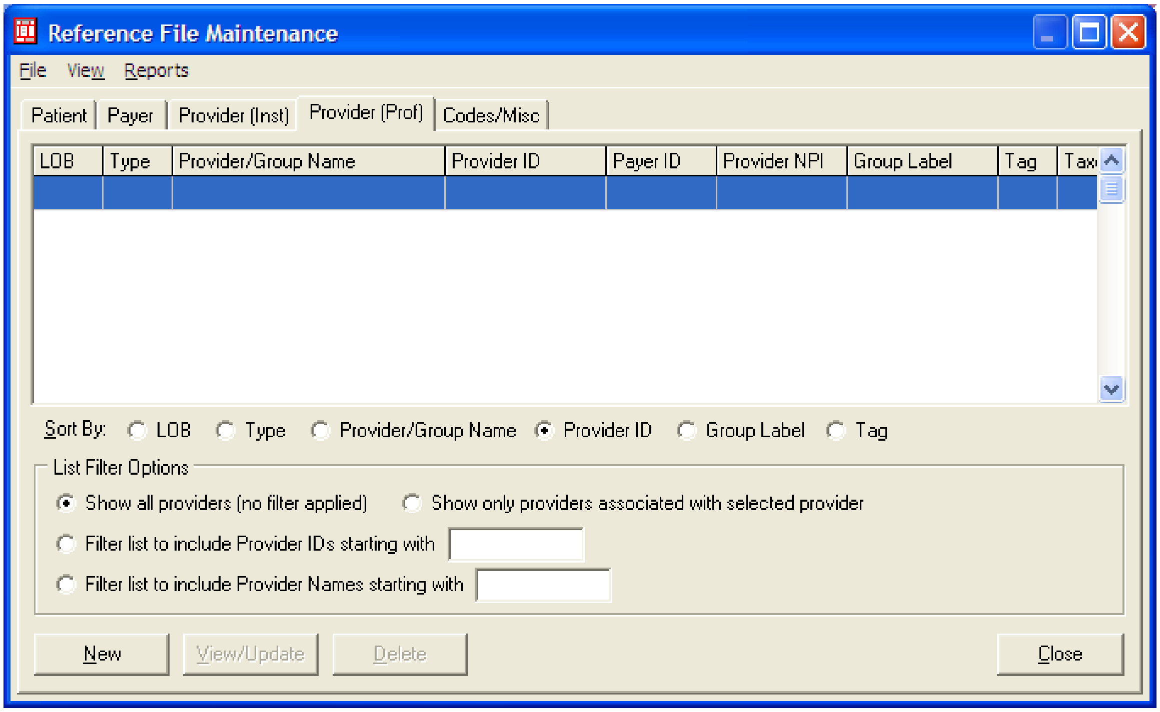
Select **Close** when finished to return to the **Codes/Misc** menu.

Some of the other options on the **Codes/Misc** tab are maintained by the software developers, and are used for entry of data later.

Note: If you need to enter facility information, it can be stored under the **Codes/Misc** tab using the **Facility** option.

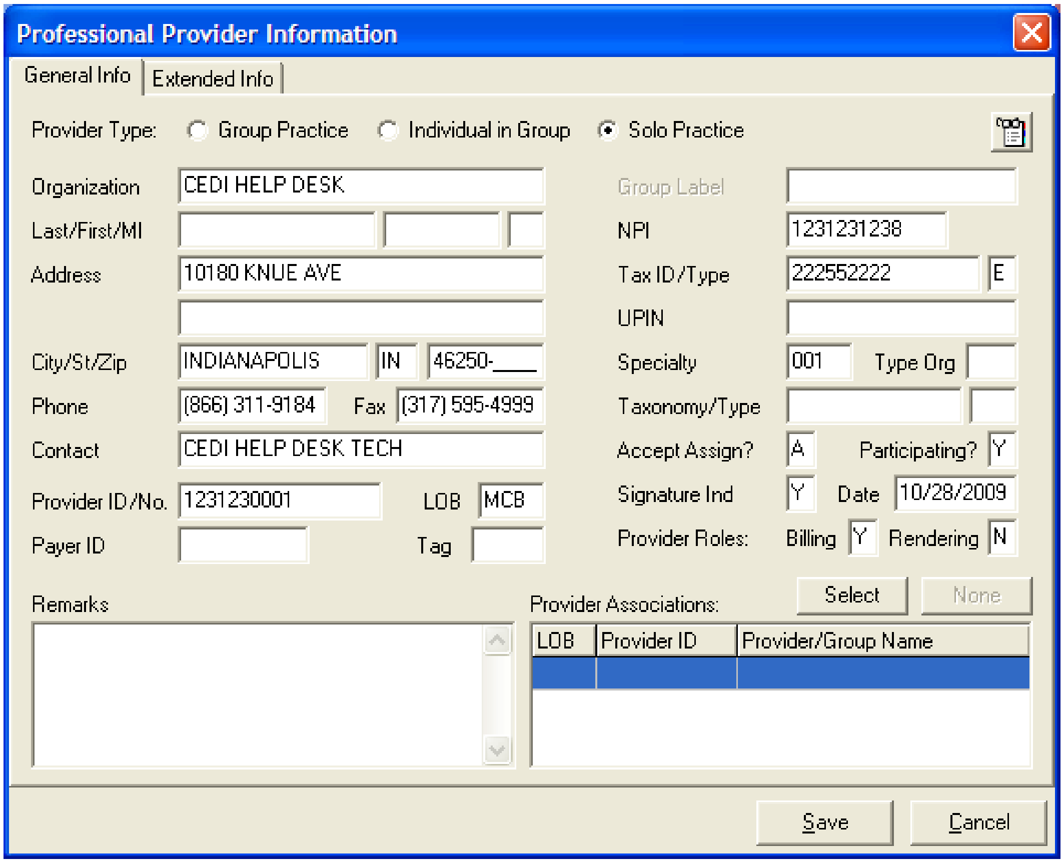
Setting up the Billing Provider

Select the **Provider (Prof)** tab on the **Reference File Maintenance** menu to enter the billing provider/supplier information.



Select **New** to add a new supplier.

Professional Provider Information:



Provider Type: All DME billing providers should be marked as **Solo Practice**.

- **Group** and **Individual in Group** are used for Medicare Part B, but not for DME.

Organization/ Name: Enter the billing provider's name either as a group under organization or individual under the name fields.

Address: Enter the billing provider's address information.

Note: It is recommended that the nine-digit Zip Code is entered in this field.

Phone/ Fax: Enter the billing provider's phone and fax numbers.

Contact: Enter the contact person.

Provider ID/No: Enter the billing provider's DME Provider Transaction Access Number (PTAN) assigned by the National Supplier Clearinghouse (NSC).

- PC-ACE Pro32 requires this to be entered, but it is not sent in claims files in compliance with HIPAA regulations.

Payer ID: CEDI will route the claims to the correct payer based on patient address, so any of the following Payer IDs may be used.

- 16003 for Jurisdiction A
- 17003 for Jurisdiction B
- 18003 for Jurisdiction C
- 19003 for Jurisdiction D

Note: When claims are prepared for submission, only one Medicare Payer can be selected at a time. **Either**

- Select one Medicare DME Payer ID for all patients and provider regardless of the jurisdiction they live in. This will allow you to send all Medicare DME claims in one transmission, **Or**
- Select the proper Medicare Payer ID for the jurisdiction the patient lives in. This will force you to prepare separate submissions for each jurisdiction.

NPI: Enter the billing provider's National Provider Identifier (NPI).

- PC-ACE Pro32 will validate that the NPI is a valid NPI.

Tax ID/Type: Enter the billing provider's Tax ID or the Social Security Number that is on file with the NSC. The **Type** will either be **E** or **S**

- **E** indicates this number is a Tax ID
- **S** indicates this number is a Social Security Number.

UPIN: This is left blank. UPIN numbers are no longer sent in DME claims.

Specialty: Use the right-click or F2 lookup features to select the option that is most appropriate.

Type Org: This is left blank.

Taxonomy/Type: This field is optional. The taxonomy code is not used in DME Medicare claims but may be required by a secondary insurance.

The remaining fields may be completed using the right-click or F2 lookup feature.

Note: Some items will not let you click out of them without making a selection, and some will not allow you to save the provider information without making a selection. In this latter case, a warning box will pop up, and the item in error will start flashing, drawing your attention to where you need to make a correction.

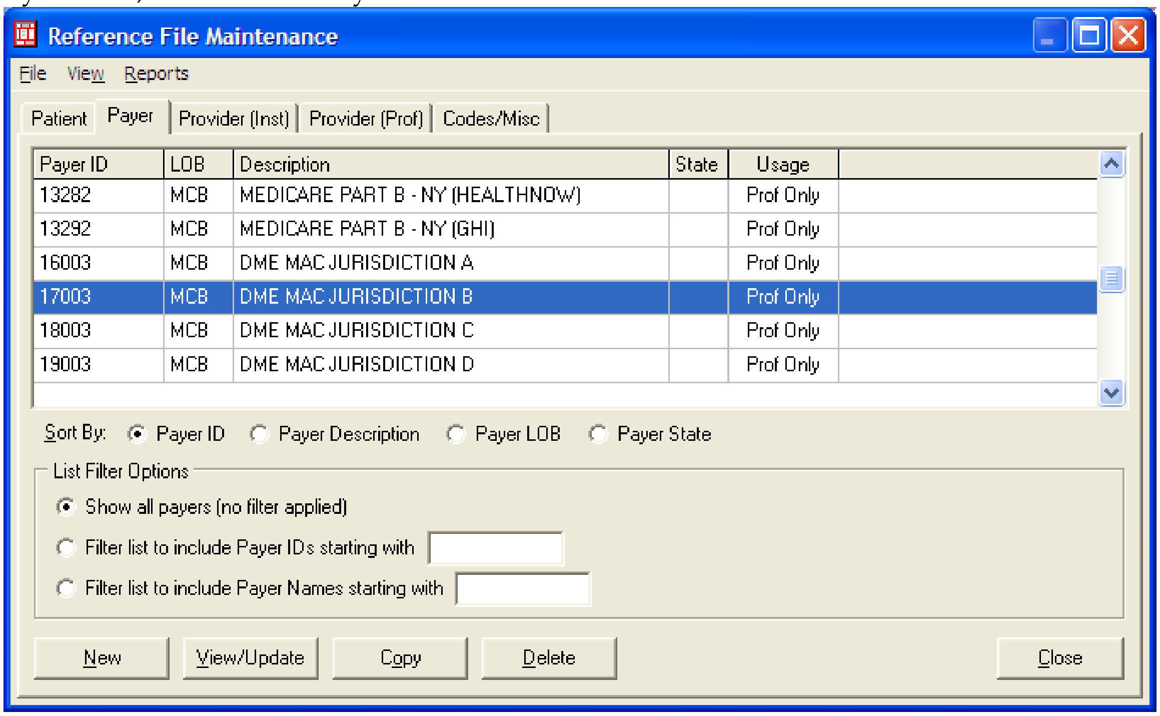
The **Extended Info** tab will not be needed unless you are directed to enter information here by CEDI technical support.

Select **Save** to save the billing provider information.

Setting up Payers (Insurances)

The **Payer** tab on the **Reference File Maintenance** menu is to set up the insurances that will be used in the software.

By default, all Medicare Payer IDs that are valid for this build of PC-ACE Pro32 are listed here.

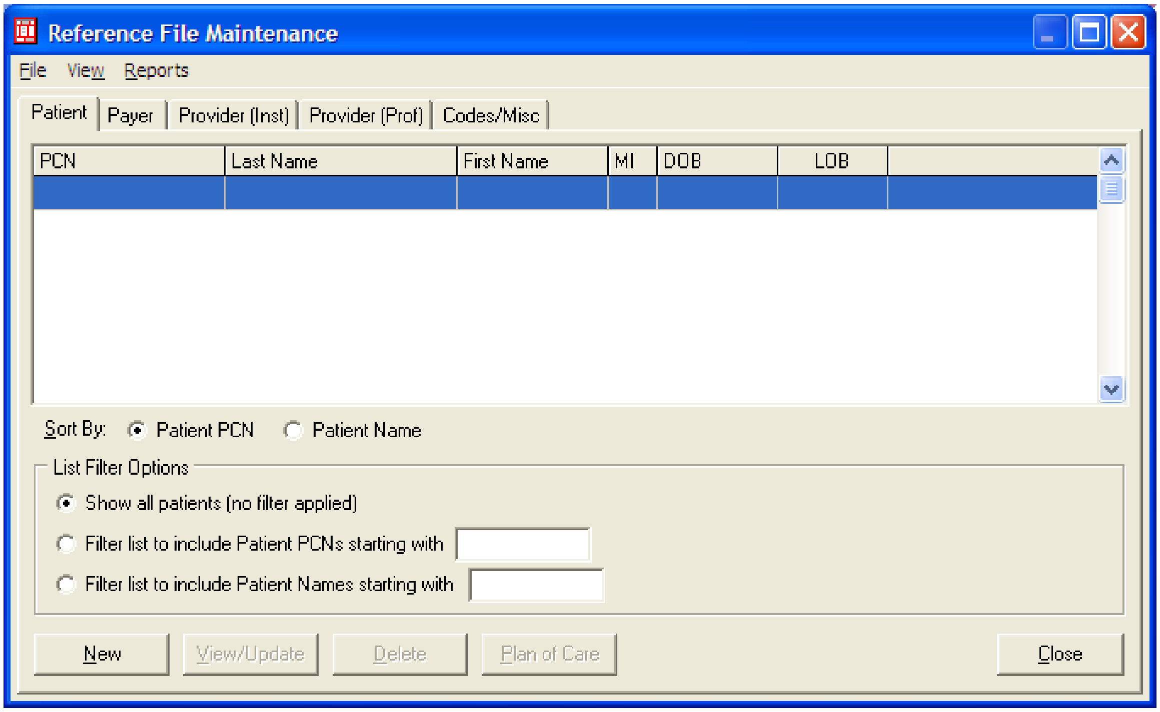


If you need to add non-Medicare insurance, for Coordination of Benefits (COB) or Medicare as Secondary Payer (MSP) purposes, select **New** to add the payer ID.

Note: More information about entering Secondary Insurances are included in the PC-ACE Pro32 Secondary Insurance document located on the CEDI Web site www.ngscedi.com under Resource Materials.

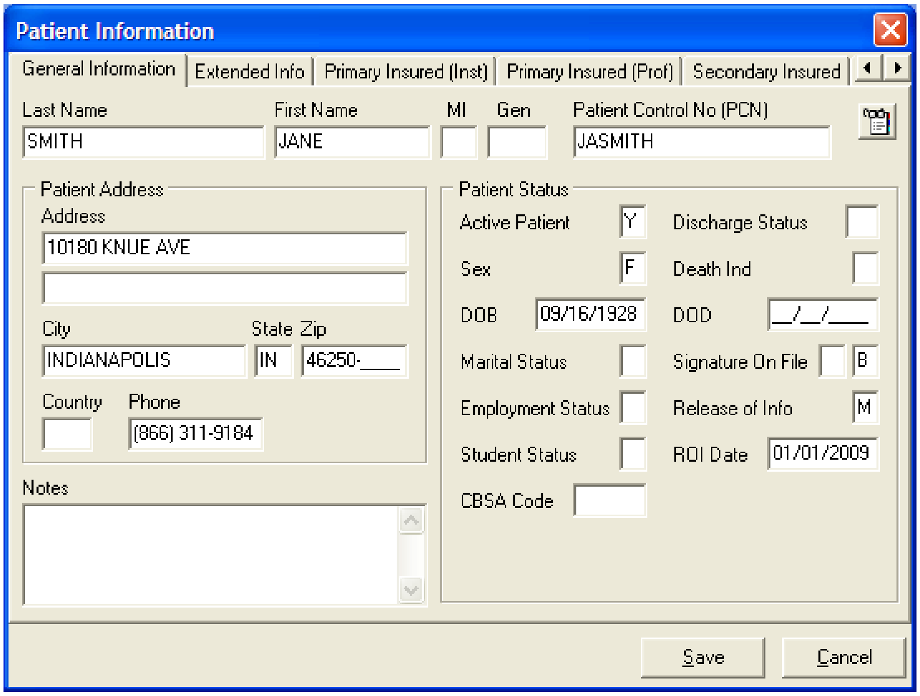
Setting up Patient Information

The **Patient** tab of the **Reference File Maintenance** menu is where patient information is added.



Select **New** to add a new patient.

General Information tab:



Right click or use the F2 key for lists of options in many of these fields.

Make sure the patient's name is entered exactly as it appears on the patient's Medicare ID card.

Patient Control Number is an ID number assigned by the provider or submitter.

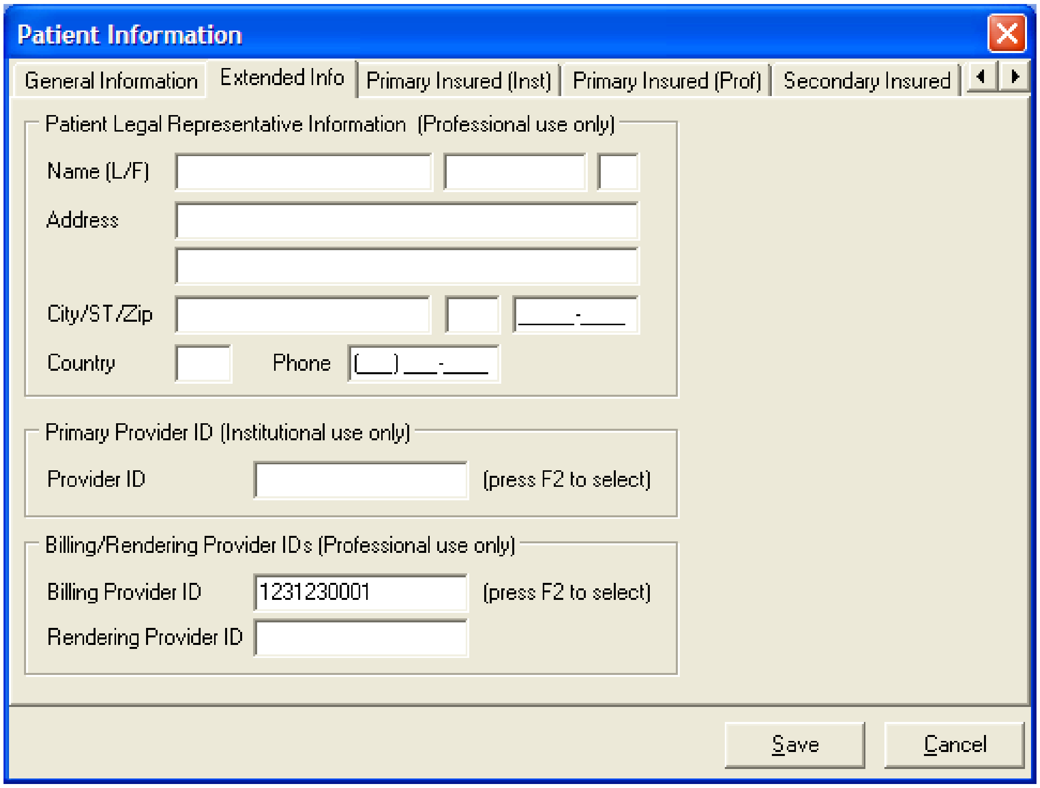
There are two boxes by **Signature on File**.

- The first box (empty in the example above) is for Medicare Part A Institutional claims and will be blank.
- The second box is for DME and Medicare Part B Professional. Right click or use the F2 key to get the list of valid values.

Release of Info(rmation) has several options listed on its right click/F2 lookup list. Only M, N, and Y are valid for DME. Any other entries will result in front end rejections.

Note: Some fields may not be required. Only enter information if it applies to this patient.

Extended Info tab:



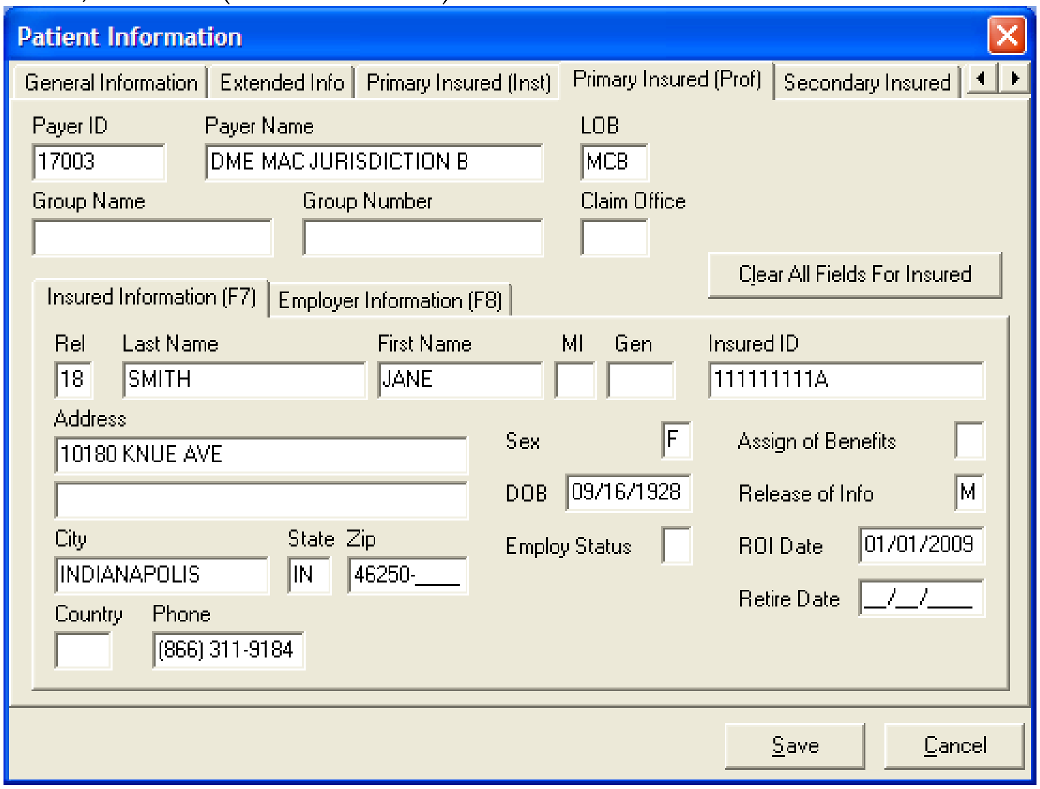
Patient Legal Representative Information: This field should only be filled out when the patient is legally represented by someone else. For example, this would be the name of the person that has power of attorney.

Primary Provider ID (Institutional use only): This is not used for DME and will be left blank.

Billing/Rendering Provider IDs (Professional use only):

- **Billing Provider ID** is where you can indicate which supplier is most likely the one this patient will have claims for. This will save time during claims entry.
- **Rendering Provider ID** is left blank – this is for Medicare Part B (office visit) claims, not DME.

Primary Insured (Prof) tab:
Right-click or hit the F2 key to select the primary payer. This should fill in the Payer ID, Payer Name, and LOB (Line of Business) fields.



Payer ID: When claims are prepared for submission, only one Medicare Payer can be selected at a time. Either

- Select one Medicare DME Payer ID for all patients regardless of the jurisdiction they live in. This will allow you to send all Medicare DME claims in one transmission
- Select the proper Medicare Payer ID for the jurisdiction the patient lives in. This will force you to prepare separate submissions for each jurisdiction

Group Name and **Group Number:** These are only entered if they are indicated on the patient's insurance ID card – these are left blank for Medicare.

Claim Office: This will most likely be blank unless indicated on the insurance ID card.

Insured Information (F7):

Rel: Select the relationship of the patient to the insured party.

- For Medicare, this is always **18 – Self**. This will fill out the rest of the information.
- Use the right-click or F2 lookup function to make the appropriate choice.

Insured ID:

- For Medicare, this is the field for the Medicare ID number. It must match the information on the patient's Medicare ID card exactly.

If the patient has a secondary insurance, the insured party will be added on the **Secondary Insured** tab. For DME patients, secondary insurance information will need to be entered under **Secondary Insured (Prof).**

For more information about entering secondary insurances or Medicare as a secondary payer, please refer to the PC-ACE help documents and the PC-ACE User Guide on the CEDI Web site www.ngscedi.com under Resource Materials.

Medicare does not allow tertiary insurance claims, so this tab should be left blank.

The PC-ACE Pro32 software should be setup to start entering claim information. For more information about entering claims into the PC-ACE Pro32 software, please refer to the PC-ACE Pro32 help documents and User Guide on the CEDI Web site www.ngscedi.com under Resource Materials.

Communication Setup

The PC-ACE Pro32 software does not offer a communication component to send claims to the CEDI gateway. CEDI offers the NGSComm communication program to be used with the PC-ACE Pro32 software to send claims to the CEDI gateway. Instructions for downloading, installing, and setting up the NGSComm program are available on the CEDI Web site under Resource Materials located at the following link: http://www.ngscedi.com/outreach_materials/outreachindex.htm

For directions specific to the PC-ACE Pro32 software, follow the instructions provided in the NGSComm Instructions for PC-ACE Pro32 Users.

Option for Electronic Remittance Advice

This option is for Trading Partners/Submitters who receive Electronic Remittance Advice or 835 files when downloading reports from the CEDI Gateway. This is not required. If you receive paper remits, you will not need to complete this step.

The Medicare Remit Easy Print software can be downloaded from the CEDI Web site www.ngscedi.com under Software Downloads and Documentation.

Downloading Medicare Remit Easy Print:

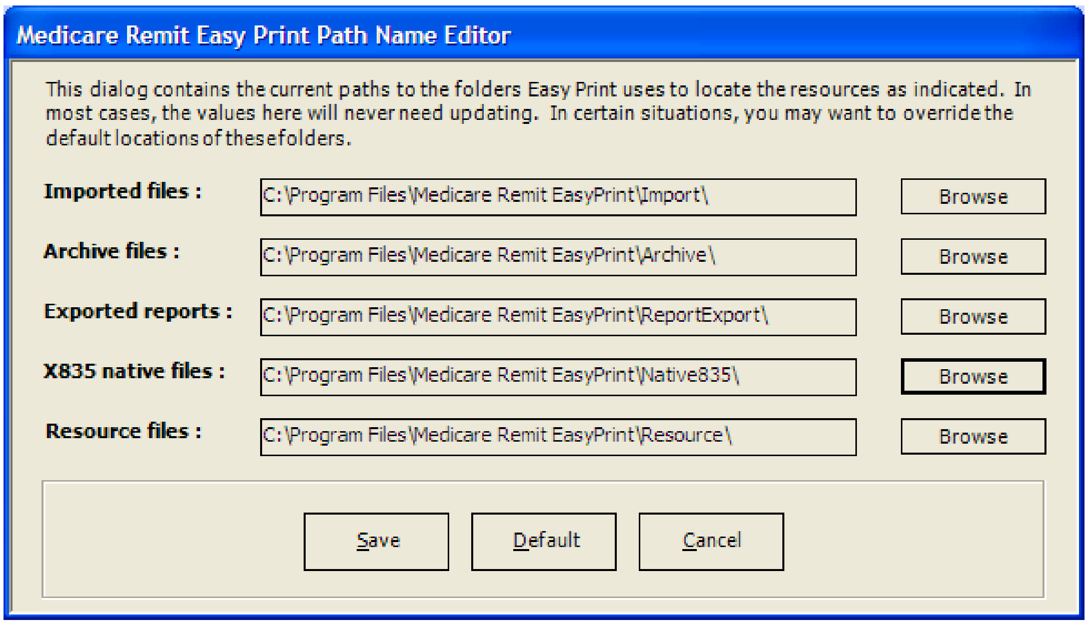
- Select the Medicare Remit Easy Print Software Download. This will direct you to the Centers for Medicare and Medicaid Services webpage for Medicare Remit Easy Print.
- Under the Downloads section, you will want to select the link for *Medicare Remit Easy Print – Version*

  Note: The user manual and download instructions are also listed under the downloads section.

Setting Up Medicare Remit Easy Print:

- Open the **Medicare Remit Easy Print** using the shortcut/icon on your desktop. This should appear after the download and installation are completed. If the icon does not appear on your desktop, check the All Programs list under the Start Menu on your computer.

- Select **Tools** and **Path Name Editor**

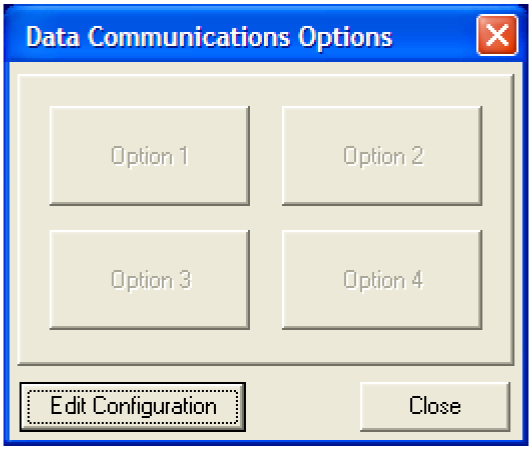


- Select the **Browse** option for X835 native files
- You will need to create a folder to download your CEDI reports to after transmitting the DME claims files. The folder can be created prior to entering the Medicare Remit Easy Print program or while you are browsing for the folder. Select this folder.
- Select **OK** and **Save**

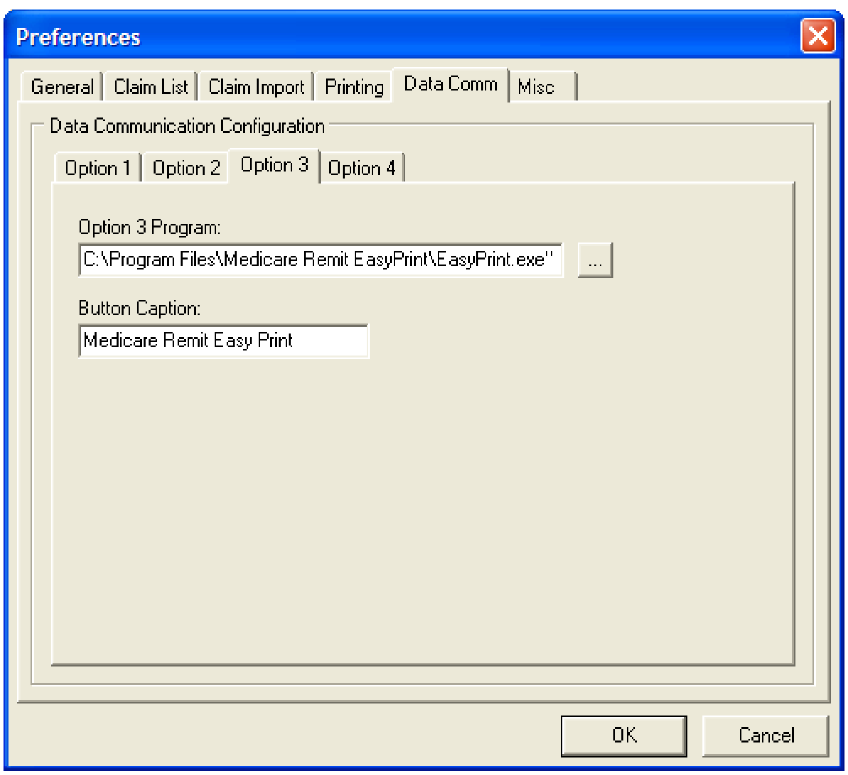
When importing Medicare Remittance Advised from Medicare DME, the software should now view the new folder.

If you would like to link your Medicare Remit Easy Print software to open through the PC-ACE Pro32 software, follow the directions below. You do not need to complete this step if you choose to open the Medicare Remit Easy Print software by using the icon on your desktop.

- Open the **Data Communications Menu** in the PC-ACE Pro32 software. (This is the option showing the two computers connected by a telephone.)



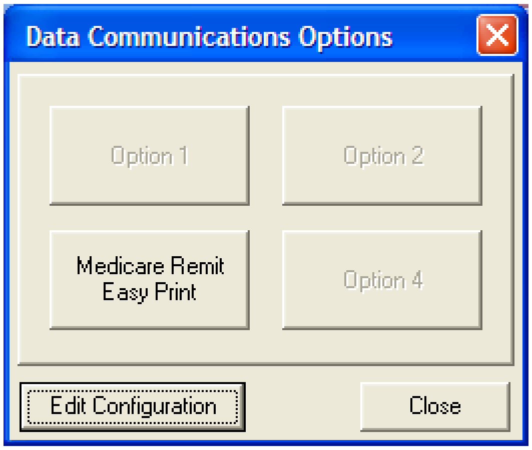
- Select **Edit Configuration**.
- Select the **Option** tab that you would like to use for the Medicare Remit Easy Print program. (For this example, Option 3 is selected.)



- Use the **…** button to select the Medicare Remit Easy Print file **EasyPrint.exe**.

(This is located under the Local Disk (C:) drive, Program Files, Medicare Remit Easy Print. This is what it should look like C:\Program Files\Medicare Remit EasyPrint\EasyPrint.exe)

- Under **Button Caption**, enter **Medicare Remit Easy Print**.
- Select **OK**.
- Your **Data Communications Menu** should now show the following:



Note: Other options may be used for other functions.