



| technical document

>> Connecticut Medical Assistance Program

November 2020

Provider Electronic Solutions Handbook

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Introduction to Provider Electronic Solution

Welcome to the Gainwell Technologies Connecticut Medical Assistance software, Provider Electronic Solutions. Provider Electronic Solutions software is designed to allow the billing provider to submit electronic transactions. The Provider Electronic Solutions supports the following transactions:

- Batch Eligibility Request
- Long Term Care claims

Provider Electronic Solutions meets the current requirements of the Health Insurance Portability and Accountability Act (HIPAA) for the transmission of electronic transactions and transaction information. This software allows providers to perform two important billing tasks in the Connecticut Medical Assistance program:

- Send and receive a transaction regarding client eligibility
- Submit electronic claims transactions

How Is This Handbook Organized?

This Connecticut Provider Electronic Solutions Handbook is designed to help the first-time user and the experienced user install, prepare, and use the Provider Electronic Solutions software.

It has the following sections:

Section	Description
Basic Skills	Using the keyboard and mouse. Viewing the Provider Electronic Solutions window layout, menu options, and correcting errors.
Getting Started	Logging on, establishing passwords, and accessing the program.
Forms	Creating transactions for eligibility requests and claims.
Communication	Submitting forms through the Web submission. Batch resubmission of forms through the Web. Viewing and printing transaction responses. Viewing and printing communication logs.
Lists	Building the lists that are used regularly to check eligibility and submit claims.
Reports	Viewing and printing detail or summary reports.
Tools and security	Archiving forms. Compacting, repairing, and unlocking the database. Obtaining upgrades. Changing passwords, Setting up software options and security.
PROVIDER ELECTRONIC SOLUTION Installation	Installing the software application on an individual PC or on a network.

Guide	
Appendices	Description of codes and troubleshooting.

System Set-Up

Equipment Requirements

PROVIDER ELECTRONIC SOLUTION is designed to operate on a personal computer system with the following equipment requirements:

Minimum	Recommended
Pentium II	Pentium II
Windows 98, 2000, XP	Windows 2000, NT, XP, Vista, 7
Microsoft Internet Explorer 5.5 or greater	Microsoft Internet Explorer 5.5 or greater
64 MB RAM	128 MB RAM
800 X 600 resolution	1024 X 768 resolution
100 MB free hard drive space	100 MB free hard drive space
Printer with 8 pt MS sans serif is preferred	Printer with 8 pt MS sans serif

Note If you have a version of Internet Explorer below 5.5, contact Microsoft.

Program Installation

The Provider Electronic Solutions software is available on the Connecticut Medical Assistance Program Web site at www.ctdssmap.com

PROVIDER ELECTRONIC SOLUTION may be installed on a computer's hard disk drive or on a network. Providers may choose either a "Typical" or "Workstation" (network) installation. You may install PROVIDER ELECTRONIC SOLUTION on as many PCs as needed

For network installation, only the PROVIDER ELECTRONIC SOLUTION database is loaded onto the server and the application is loaded onto individual personal computers (PCs). PROVIDER ELECTRONIC SOLUTION cannot be used with terminal server solutions.

Note See the PROVIDER ELECTRONIC SOLUTION Installation Guide for complete installation instructions.

Getting Started

Opening the PROVIDER ELECTRONIC SOLUTION Application

To access the Provider Electronic Solutions application after installation, use one of two methods:

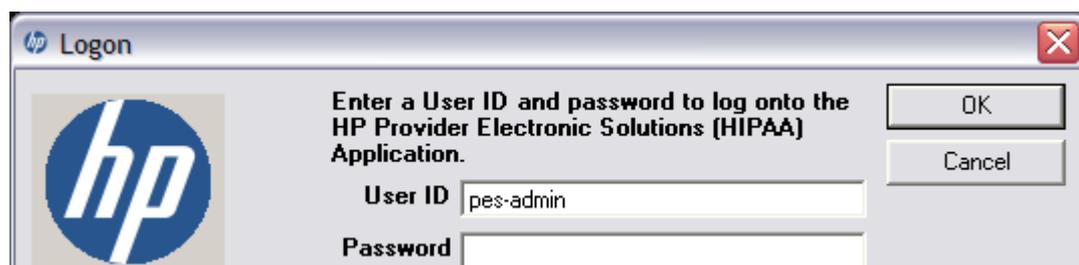
- Double click the folder named CT HP Provider Electronic Solution on the desktop and then select CT HP Provider Electronic Solutions.
- Select the **Start** button, then select Programs | CT HP Provider Electronic Solutions | CT HP Provider Electronic Solutions.

Logging On for the First Time

The PROVIDER ELECTRONIC SOLUTION software provides basic security for the user through the logging-in process. The User ID defaults to **pes-admin**. This does not need to be changed.

When logging on for the first time after installing, you will be prompted to change your password. This also allows you to set up a tool in PROVIDER ELECTRONIC SOLUTION to help you should you forget your password in the future.

Note If you have been set up with a User ID other than pes-admin, enter your User ID in the User ID field, then tab to the password and enter the password set up for that User ID. For instruction on how to set up separate User IDs refer to Security in the Tools section.



Step 1 The User ID field displays **pes-admin**. (This does not need to be changed unless you have been given a new User ID by your system administrator.)

Step 2 In the password field in the Logon box:

- If you are installing PROVIDER ELECTRONIC SOLUTION, enter the password: **hp-pes**
- If you are upgrading PROVIDER ELECTRONIC SOLUTION, enter your current password.

Note Your password will not be displayed; you will see *****.

Step 3 Select **OK**. The message displayed prompts you to change your password.

Step 4 Select **OK** to continue and follow the instructions for changing the password.

Updating Your Password

- Step 1** At the logon window, in the Old Password field:
- If you are installing, enter **hp-pes**.
 - If you are upgrading, enter your current password.
- Step 2** In the New Password field, enter a new password.
- Step 3** In the Rekey New Password field, re-enter the password.
- Step 4** In the Question field, select the dropdown arrow. A list of three questions appears:
- What is your mother's maiden name?
 - What is your father's middle name?
 - In what city were you born?
- Select one question.
- Step 5** Enter the answer in the Answer field. Answers are not case sensitive and you may use spaces.
- Step 6** Re-enter the answer in the Rekey Answer field.
- Step 7** Select **OK**.
- Step 8** The next message displayed tells you that you have successfully updated your password. Select **OK** to continue.
- If you are doing an upgrade, the application main window will appear and you are ready to start using PROVIDER ELECTRONIC SOLUTION.
 - If you are doing a new installation, the system will prompt you in an application text box to set up your personal options. Select **OK**. For more on options, go to Setting up Options in this section.

Password Rules

Passwords are not case sensitive. A password may be any combination of alphabetic, numeric, and special characters. A password must be at least 5 characters in length but no more than 10 characters.

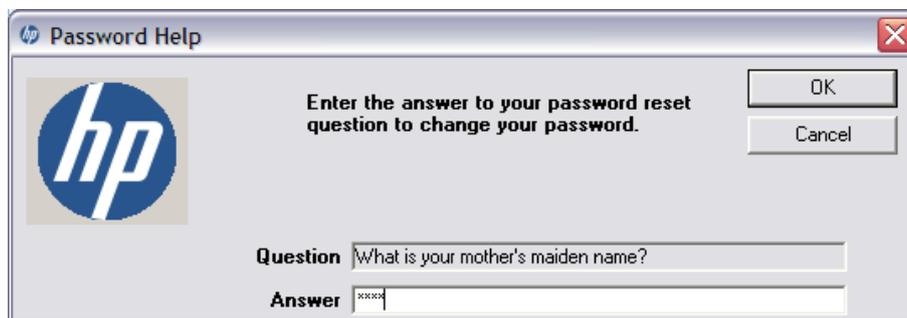
Note For instructions on what to do if you forget your password, go to Password Help.

Note Your password will expire every 30 days unless otherwise indicated in the retention settings in the **Tools | Options** menu in PROVIDER ELECTRONIC SOLUTION. For instructions on how to change the retention settings, refer to the Retention section under Setting Up Options on page 10.

Using Password Help

If you forget your PROVIDER ELECTRONIC SOLUTION password, you can use the password question to create a new password.

Step 1 Select **Forgot Password** in the Logon box. The Password Help box appears.



Step 2 Enter the correct answer. Select **OK**.

Note The answer is displayed in asterisks. Be sure that you type the answer correctly. You can make three attempts to answer the password question.

- If you correctly answer the password question, you will be prompted to create a new password. After creating the new password and rekeying it, select **OK**. The PROVIDER ELECTRONIC SOLUTION application opens.
- If you incorrectly answer the password question three times, you will receive an application prompt asking if you wish to reset your password. Select **Yes**. The system creates a 5-digit reset key number. Write down this number for contacting the EDI Help Desk.

Step 3 Select **OK**. The PROVIDER ELECTRONIC SOLUTION application closes. See Using a Temporary Password to continue.

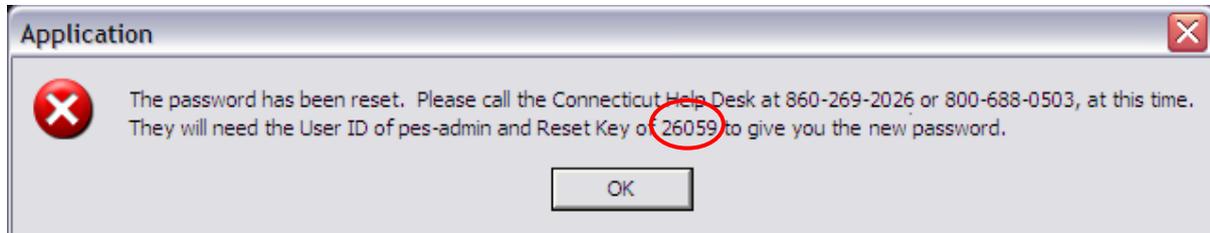
Using a Temporary Password

Step 1 Call the EDI Help Desk.
1-800-688-0503 toll free

8:00 a.m. to 5:00 p.m. ET
Monday - Friday (excluding holidays)

You will need the following Information when calling the EDI Help Desk to reset a password:

- Connecticut Medical Assistance Program provider number
- Name
- User ID (from the Logon dialogue box)
- 5-digit reset key number (a sample is shown in below inside the red oval)



Note When you call the EDI Help Desk, you will get a temporary 8-character alphanumeric password.

- Step 2** Open the PROVIDER ELECTRONIC SOLUTION application.
- Step 3** Enter the temporary password in the Logon Box Password field. Select **OK**. The PROVIDER ELECTRONIC SOLUTION application will now open.
- Step 4** Go to **Tools | Change Password** in the PROVIDER ELECTRONIC SOLUTION toolbar to change your password and set up a new password question for possible future use.

Note It is strongly recommended that, immediately after logging in with a temporary password, the user set up a new password, question, and answer. See the chapter titled Tools, Changing Your Password.

Setting up Options

Some options must be set up the first time you use the software. There are six option tabs that must be confirmed or created. They are:

- Batch
- Carrier
- Web
- Retention
- Modem
- Payer/Processor

The Options window displays with the Batch tab on top.

To access Options after the initial setup, select **Tools | Options**.

Batch

Batch contains the Trading Partner ID, Web Logon ID and Web Password information that allows the user to submit claims for services in an electronic format. If you do not know what your logon ID and password are, please contact the Provider Assistance Center at toll free at 1-800-842-8440.

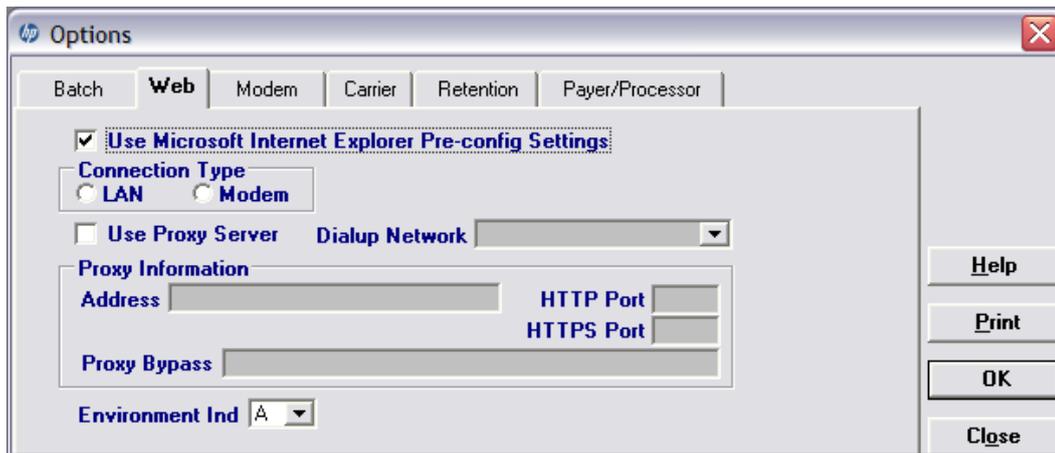
- Step 1** Enter the Trading Partner ID assigned to your facility.
- Step 2** Enter the Web Logon ID (User ID) created when you set up your Web User Account.
Note: this should not be the initial Web User ID that was sent to you. This should contain the Web Logon ID (User ID) that was created from the Account Setup on our Web site.
- Step 3** Enter the Web Password (Password) created when you set up your Web User Account.
Note: this should not be the initial Personal Identification Number (PIN) that was sent to you. This should contain the Web Password (Password) that was created from the Account Setup on our Web site.
- Step 4** Select the appropriate Entity Type Qualifier (1 = person, 2 = non-person)
- Step 5** Enter the Last Name for Individual Providers or the Organizational Name for a group
- Step 6** Enter the First Name of the Individual Provider. (If Entity Type Qualifier =2 leave blank.)
- Step 7** Enter your phone number with area code. (Do not enter dashes or spaces between the numbers.)

Web

This information is necessary for connecting with the Web site for uploading and downloading batch files.

Uploading or downloading using an existing Internet connection

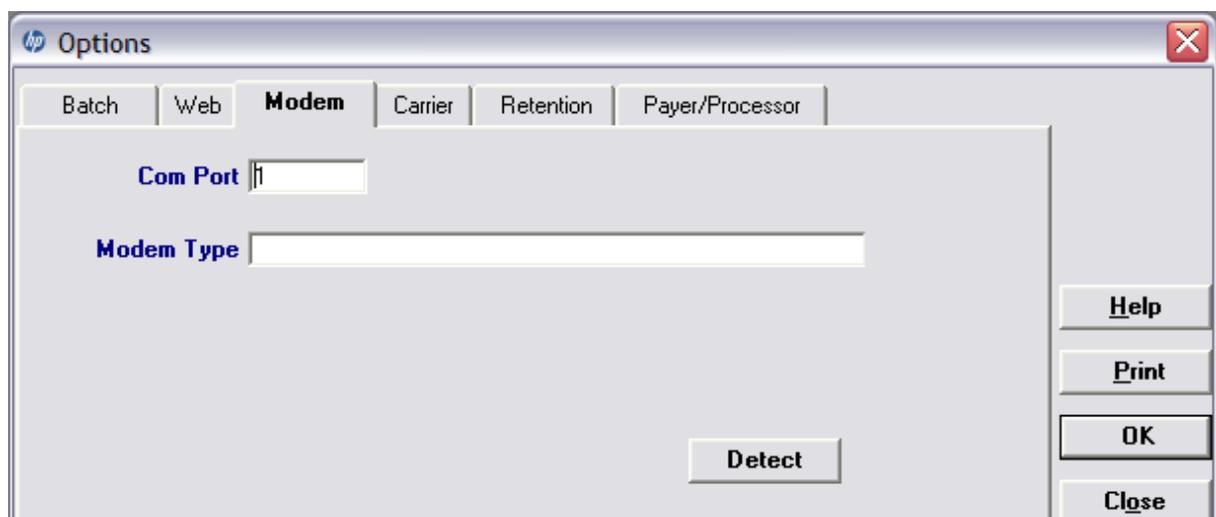
Use this option if you have an existing Internet connection using any of the following connection types: cable modem, DSL modem, ISDN modem, local area network (LAN) connection, or analog modem.



- Step 1** If the box 'Use Microsoft Internet Explorer Pre-config Settings' is selected the software will utilize your current ISP to access our Web site.
- Step 2** If you choose not to use this option then you will need to select the Connection Type as well as the Proxy Information that is appropriate for your system.
- Step 3** Select the Environment Ind dropdown box and choose the A = Acceptance and P = Production.
 Note: Acceptance is the testing environment and will be used during the testing process. Production will be used after the testing process has been completed.

Modem

Com Port should be the PC communications port (also called serial port) to which the modem is connected. The software supports only COM1, COM2, COM3 and COM4. If the modem is set up on any other Com Port, contact the hardware vendor to relocate the modem to one of the above Com Ports.



- Step 1** Click on the Detect button. If no modem is detected, click in the Modem Type field and select the drop down box. Select any type of modem from the list. This tab must be populated even if the system does not use a modem to connect to the Internet.

Carrier

This screen is the network destination identifier or address to which a transaction will be sent.



Step 1 Confirm the following settings:

Field	Setting
Trans Desc	BATCH TRANSMIT
DTR	9600
Carrier ID	DIRECT DIAL
Phone Number	blank
Net ID	blank
Net Password	blank
ATT menu	blank
X12 Production/Test Ind	T = Test (Acceptance) P = Production

Note The X12 Production/Test indicator depends on which environment you are in. Is you are doing Acceptance testing, this should be set to a T = Test. If you have been approved for Production, then this should be a P = Production. The Web tab Environment Ind defaults to "A" and the Carrier Tab X12 Production/Test Ind defaults to "T". After new Trading Partner testing is complete, be sure to change both indicators to "P". Established Trading Partners who install the software on a new system must remember to change these indicators before submission of Production transactions.

Retention

The retention settings allows you to retain data for a specific number of days or transactions before the information is deleted from the software or before notification is given for transactions that can be archived.

Step 1 Select the **Retention** tab.



Step 2 Confirm the following default settings or change the settings to meet your business needs. Use the scroll-down feature to select the appropriate setting, or key the value you have determined meets your business needs.

Retention Field	Default Setting/Description
Archive Days	<p>Default days: 30.</p> <p>Maximum number of Days is 999 before notifying the user it is time to archive submitted forms.</p> <p>When submitting large volumes of claims, archive claims every 30-60 days.</p>
Max Batch	<p>Default listings: 10.</p> <p>Maximum number of batches retained in the Resubmission option of the Communication menu.</p> <p>Listing on the Batch list will be deleted on a first-in/first-out basis. Maximum number of batches that can be retained is 999.</p>
Max Verify	<p>Default number of download files: 25.</p> <p>Maximum number of downloaded responses is 999.</p> <p>Downloaded files will be deleted on a first-in/first-out basis.</p>
Max Log	<p>Default number of Communication log backups: 10.</p> <p>Maximum number of Communication log backup files retained is 999.</p>

Retention Field	Default Setting/Description
Max Submit Reports	Default number of submission reports: 30. Maximum Submission Reports retained is 999.
Max Bulletin	Default number of Bulletins: 10. Maximum Bulletins retained is 999.
Password Expiration	Default number of days before password expires: 30. Maximum number of days before Password expires is 99. Note: This is the Logon password that will allow you to access the PES software.

Payer/Processor

This screen is defaulted to the required setting for transmission of services to the Connecticut Medical Assistance program.

Step 1 Select the **Payer/Processor** tab.

The screenshot shows a software window titled "Options" with a tabbed interface. The "Payer/Processor" tab is selected. The fields are as follows:

Field	Value
Name	HP/CTMAP
ETIN	445498161
Identifier Code Qualifier	PI
Identifier Code	75-2548221

Buttons on the right side include Help, Print, OK, and Close.

Step 2 Confirm the following default settings:

Field	Setting
Name	HP/CTMAP
ETIN	445498161
Identifier Code Qualifier	PI
Identifier Code	75-2548221

Step 3 Select **OK** to save.

Basic Skills

If you have average computer skills, you should find the Provider Electronic Solutions environment familiar and will probably appreciate the ease of use. The keyboard, pull-down menus, toolbars, and buttons are similar to other MS Windows software.

If you are a first-time computer user or have limited experience, take the time now to get a feel for the Provider Electronic Solutions screens and how they work. These few basic skills will have you checking eligibility and submitting claims quickly and efficiently!

Using the Keyboard

Many computer users find it easiest to use the computer keyboard to move around on a screen. The following table is a list of keys that can be used.

Press this key...	To do this...
Tab or Enter	Go to the next field
Shift + Tab	Go to the previous field
Left Arrow	Move backward within a field
Right Arrow	Move forward within a field
Up Arrow	Scroll up through a list
Down Arrow	Scroll down through a list
F1	Open online help when the cursor is on a data entry field
ESC	Exit the help window
Alt + Down Arrow	Show available list choices
Alt + hot keys	Hot keys are identified on the Menu by an underlined letter that you hit along with the Alt key on the keyboard. These buttons vary from screen to screen.

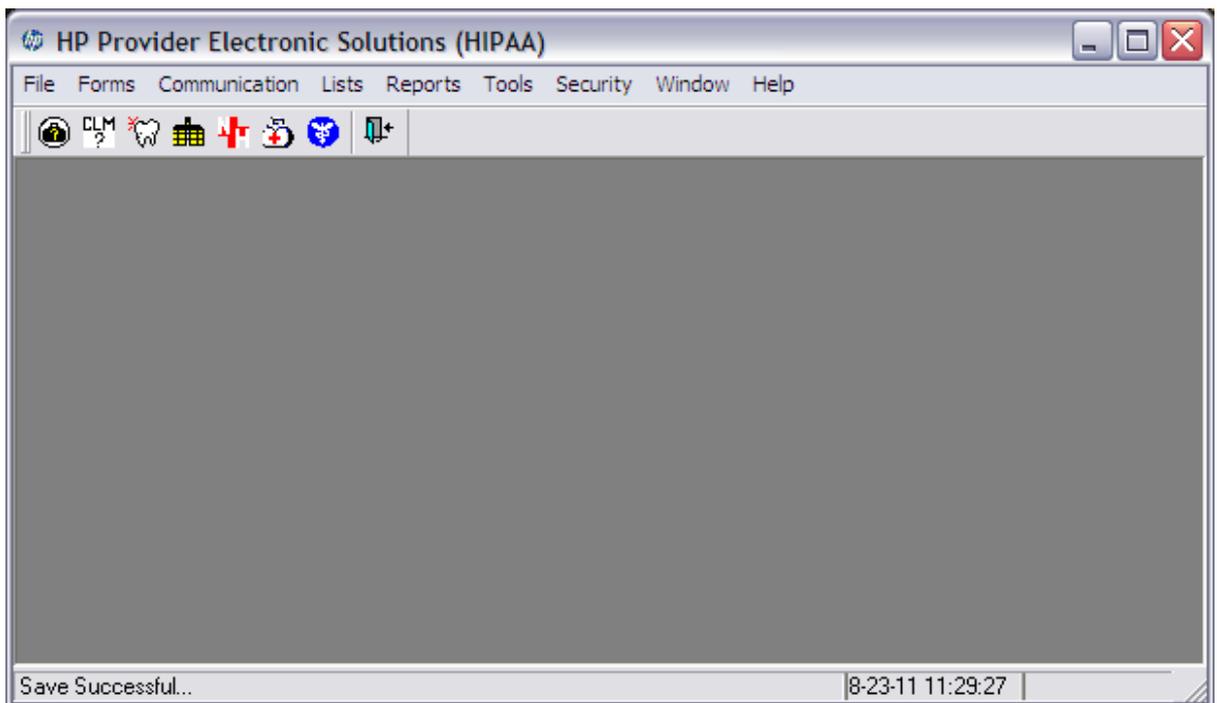
Using the Mouse

Use the mouse to navigate around the PROVIDER ELECTRONIC SOLUTION software screens, for example, when you want to select an option. Click the left mouse button once to position your cursor at that location or to select an option.

Double click when the down arrow in a field is selected, either a window or a list selection will appear. If no data has been entered in the list double click on the field to "jump" to it and add the required data. Refer to the Lists chapter for assistance in completing the required fields for each list.

Right click to Cut, Copy, Paste, and Select All.

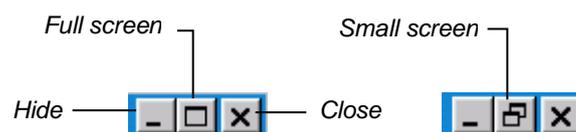
Looking at the Provider Electronic Solutions Window



Here is a quick tour of the Provider Electronic Solutions window. There are two basic windows and both are easy to use. The first window has the main menu of all the functions you can choose: file, forms, communication, lists, reports, tools, security, window, and help. Some of these options are then repeated in the toolbar directly below the menu bar.

Main Menu

In the upper right-hand corner of the main window there is a set of three little boxes you can use to hide, re-size, or close the window. You can also hide, re-size and close the active window inside of the main window. Be careful with the . You can close the program by clicking it. Fortunately, Provider Electronic Solutions will always ask you if you are sure you want to save any changes before you close.

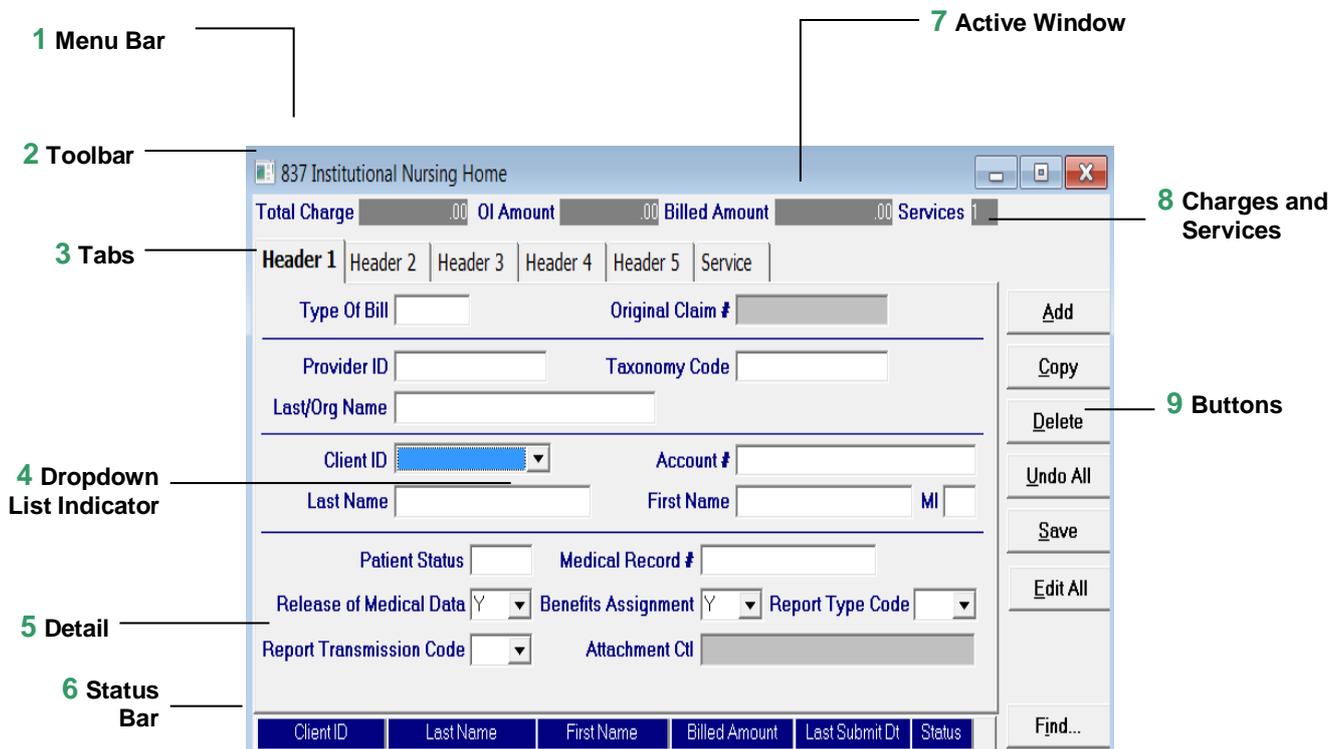


When you select one of the options from the Menu Bar, two things happen: the screen for the option you chose opens inside of the main Provider Electronic Solutions window and its Menu Bar changes.

Tip Use the Hide feature to minimize Provider Electronic Solutions between patients. This allows you to have access to the application throughout the day.

PROVIDER ELECTRONIC SOLUTION Window

The explanation for each callout in the Provider Electronic Solutions window is provided below the diagram.



1 Menu Bar

The Menu Bar appears at the top of the Provider Electronic Solutions window. It is a list of basic options. There are two Menu Bars, one for the Main Window, and a second that opens once you select an option.

2 Toolbar

Toolbars are designed to work as shortcuts for frequently used menu commands to reduce the time and steps needed to activate a function when needed. A Toolbar consists of small pictures or buttons that represent different menu commands. To execute a command using the Toolbar, simply click on the button with the mouse. To see a name or brief description of each button, move the cursor arrow over the button but do not click the mouse. The description will appear just below the button.

3 Tabs

Fields in the eligibility and claim forms are organized into Tabs with related fields in separate Header or Service Tabs. Additional Tabs also are added to some forms, such as when other insurance is indicated.

4 Dropdown List Indicator and Dropdown List

If a downward-pointing arrow is displayed in a field, this means multiple options are available for that field. Click on the arrow and a list of valid values will be displayed. If there is a scroll bar on the right, be sure to use it to see all the options on the list. If you double click in the field, you will be able to create or add to the list associated to the field.

5 Detail

A Detail lists all claims or transactions that have been completed for the form. In the Lists selection, the Detail displays all information that was created for the specific list. Possible values are: R = Ready, F = Finalized.

6 Status Bar

The Status Bar indicates the mode that the screen is in such as 'Ready' or 'New Record Added.' When you move your cursor down a list on the Menu Bar, the options will be displayed in the Status Bar as the cursor moves across the menu items or down the list.

7 Active Window

You can open up to three separate forms, lists, and/or reports at one time. Select 'Window' on the Menu Bar to display screens in a cascade, tiled, or layered view.

8 Charges and Services

Charges and Services Field	Description
Total Charges	Populated from the charges entered in the Service 1 tab.
OI Amount	Populated from the OI tab indicating how much a primary insurance paid on the services indicated on the Service 1 tab.
Billed Amount	Total charges to be billed to Connecticut Medical Assistance program less the amount paid by the primary insurance, if applicable.
Services	Number of service details associated to the claim.

9 Buttons

Buttons are located along the right side of each individual screen. These Buttons will vary from screen to screen. See the 'More on Buttons' section for detailed information.

Menu Options

This menu option...	Allows the user to...
File	In the Main Menu, you can exit from the application. In Forms, Lists, and Reports, you can add, delete, and print.
Forms	Select the online form needed. See chapter that describes Forms for more information about this option.
Communication	Submit batches of forms and process batch responses. Copy batches of forms. Resubmit batches of forms. View Communication Log files. See the chapter that describes

This menu option...	Allows the user to...
	Communication for more information about this option.
Lists	Add and edit reference lists, which allow the user to collect information to be used when completing transactions within the software. See the chapter that describes Lists for more information about this option.
Reports	Print summary or detail reports with information from forms or reference lists. See the chapter that describes Reports for more information about this option.
Tools	This option allows the user to create and work with archives, perform database maintenance, retrieve upgrades, change their password, and change setup options. The 'Options' selection allows the user to set up communications options and determine retention settings. See the chapter that describes Tools for more information about this option.
Windows	Standard options available for most Windows compatible applications.
Help	Obtain help about Provider Electronic Solutions functions, screens, menus, and fields using Contents and Index. Select About to view information about this application such as version and copyright.

Tool Bar Icons



270/271 Eligibility Inquiry and Response



837 Institutional Nursing Home



Exit Program

More on Buttons

The user can activate buttons by clicking on them with the mouse or using the hot key associated with that button. These buttons will vary from screen to screen.

Button	Description
Add	Work with a new form. You are automatically ready to enter data into a new form when you first select a form type to work with.
Copy	Make a copy of a previously submitted form or current form if submitting multiple claims for the same client. This action enables you to make corrections to the new form as needed.
Delete	Delete the current form. You will be asked if you are sure that you want to delete it. If you select "Yes" the form will be deleted. You will only be able to delete a form if it has a status of R which indicates the form is "Ready" to be transmitted.
Undo All	Reverse all of the changes that you have made to the current form. You will only be able to undo the changes made since the last time you saved the form.
Save	<p>Save what you have entered in the current form or list. When you save a form, the data will be checked to see if it meets the criteria for the field (such as, a client ID number doesn't have enough digits in it or a required field has not been completed). A list of errors will be presented for you to correct. For more information on how to use the error list, see Correcting Errors.</p> <p>When you have finished working with a form and selected save, the form status is updated in the detail to an "R" to indicate the form is "Ready" to be transmitted.</p>
Edit All	Edit the dates of service for all claims with a status of "R" for "Ready" (Found only on Eligibility and Nursing Home Forms)
Find	Locate specific forms in the list in the lookup window.
Print	Print data associated to the form you are currently viewing in Provider Electronic Solutions. Eligibility transactions, claim forms, and reports are displayed in a report format to be viewed online or may be printed. Lists can also be viewed or printed.
Close	Close the form window. If you have made changes to the current form, you will be asked if you want to save those changes before you leave the window.

Correcting Errors

If all the required data is not included in a Form or List, a listing of error messages will display for you to correct. Either double click on the error message or click the **Select** button. The software will return to the field that has missing or incorrect data. You will not be able to save a form if there is missing or incorrect data.

Note The software only recognizes errors such as an empty field or alpha characters in a field that should be all numbers. If you enter the wrong information, such as too many or too few units, the software will not catch this as an error.

Exiting from Forms

When you complete a form you then have several choices about what you want to do next.

Form Option	Description
Save a form	Select the Save button. This action will save the form in a status of "R" indicating the form is ready to be transmitted as a batch transaction. If you have more forms to be submitted, select the Add button. The software will automatically save the current form to an "R" status and allow you to enter a new form.
Add a new form	Select the Add button to add a new form or a new entry in the list options. This action automatically saves any information in the current form and indicates the form has an "R" status.
Copy a form	Transaction to be copied. Select the Copy button to copy a form or eligibility transaction that is in a status of Archived, Finalized, Ready, or Incomplete. This action copies the original transaction and allows you to make corrections to the information and readies the transaction for submission.
Add Service	Click on the Add Srv button and complete the detail screen again.
Copy Service Detail	Click on the Copy Srv button, then change data as needed for the new service detail.
Delete Service Detail	Select the Service # then click on the Delete Srv button.

Exiting from Provider Electronic Solutions

There are three ways to exit from the Provider Electronic Solutions software:

- Select the **X** in the upper right corner of the screen.
- Select **File** from the menu bar and select **Exit**.
- Click on the blue book icon in the toolbar.

If you have not saved your work, you will receive a prompt asking if you want to save your changes. You have three choices.

- Select **Yes** to close Provider Electronic Solutions and exit.
- Select **No** to close the active window but stay in Provider Electronic Solutions
- Select **Cancel** to stay in the active window.

Communication

The Provider Electronic Solutions Communication menu option provides several functions related to communicating with the HP host. These functions are:

- Submitting forms
- Batch resubmission of forms
- Viewing and printing transaction responses
- Viewing and printing communication logs

The following options are listed on the Communication drop down menu:

- Submission
- Resubmission
- View Batch Response
- View Communication Log

Submission

After completing a form, you can submit it to Connecticut Medical Assistance program using the Submission feature. In Provider Electronic Solutions, 'forms' refers to a variety of electronic transactions, which are listed with the corresponding HIPAA transaction code:

270	Eligibility Request
837	Institutional Nursing Home

Note You will need to set up your Submission options before you can send any forms. If you have not already done so, the system will prompt you now. You will see the following message: "Modem Type/Logon ID/Password is missing. Do you want to enter options information at this time?"

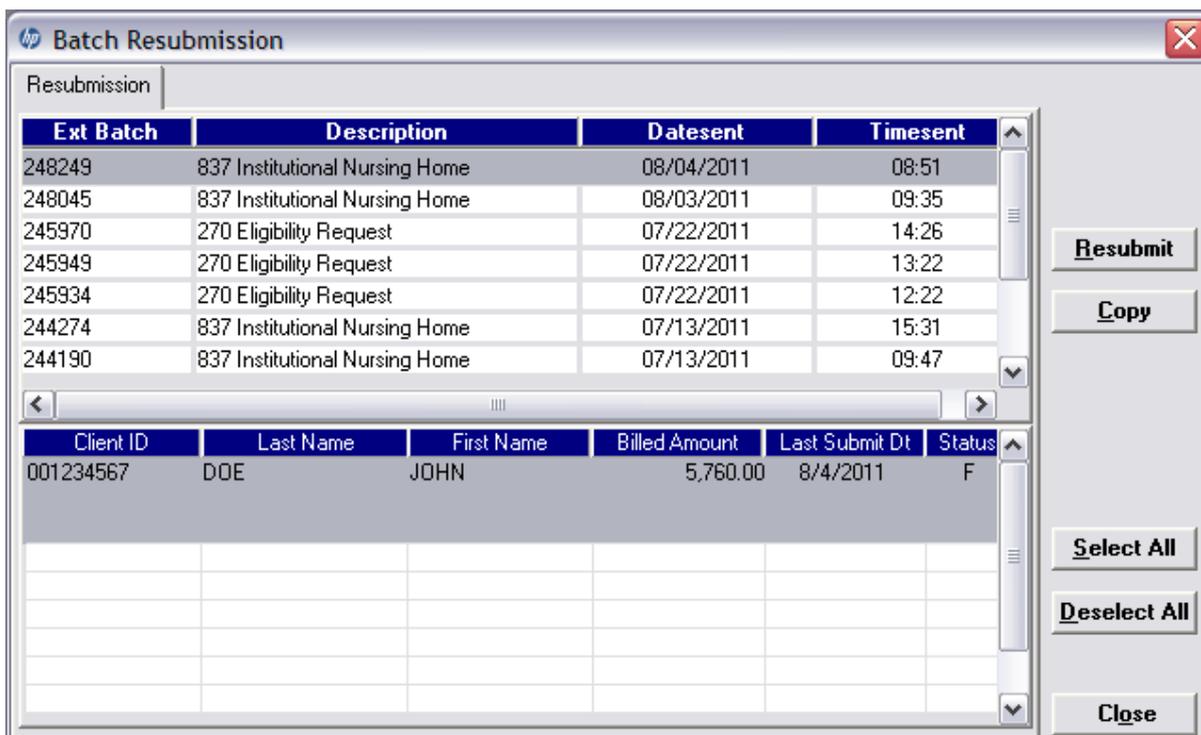
You must select **Yes** to submit forms. You will go to the Batch tab in the options screen for the Submission modem setup. After you save your entries there, you will return automatically to this screen and can continue your submission.

Step 1 Click on **Communication** on the menu bar.

Step 2 Select **Submission**. The Batch Submission window will appear.

Resubmission

Different forms and batches can be resubmitted using the Resubmission option. Depending on the system options you have selected, up to 999 batches can be retained and listed. You can resend a single form, several forms, or an entire batch of forms. You can also copy any form and modify it for future submission.



Use a batch resubmission when there is a recurring client eligibility batch or when there is a recurring weekly or monthly claim submission for the same clients.

- Step 1** Click on **Communication** on the toolbar.
- Step 2** Select **Resubmission**. A list of batches will be displayed. Selecting any batch will open a list of forms within that batch.

Resubmit

Select this option to resubmit an entire batch of forms or a portion of a batch of forms without changing them.

- Step 1** Place the cursor on the row showing the batch to be resubmitted and select it by left clicking with the mouse. A list of the forms that were sent in that batch will appear in the bottom half of the window. By default, all of the forms are already selected.
 - To resubmit the entire batch, click on the **Resubmit** button.
 - To resubmit individual forms from the batch, select the **Deselect All** button and select the individual forms one by one by placing the mouse over the form and left clicking. Once the forms have been selected, select the **Resubmit** button.
- Step 2** After clicking on the **Resubmit** button, the Submission screen will be displayed and you can proceed as if sending a regular batch.

Copy Batch Forms

Select this option to copy an entire batch of forms or a portion of a batch of forms for use later. You can then edit the forms from the appropriate form transaction. After editing the

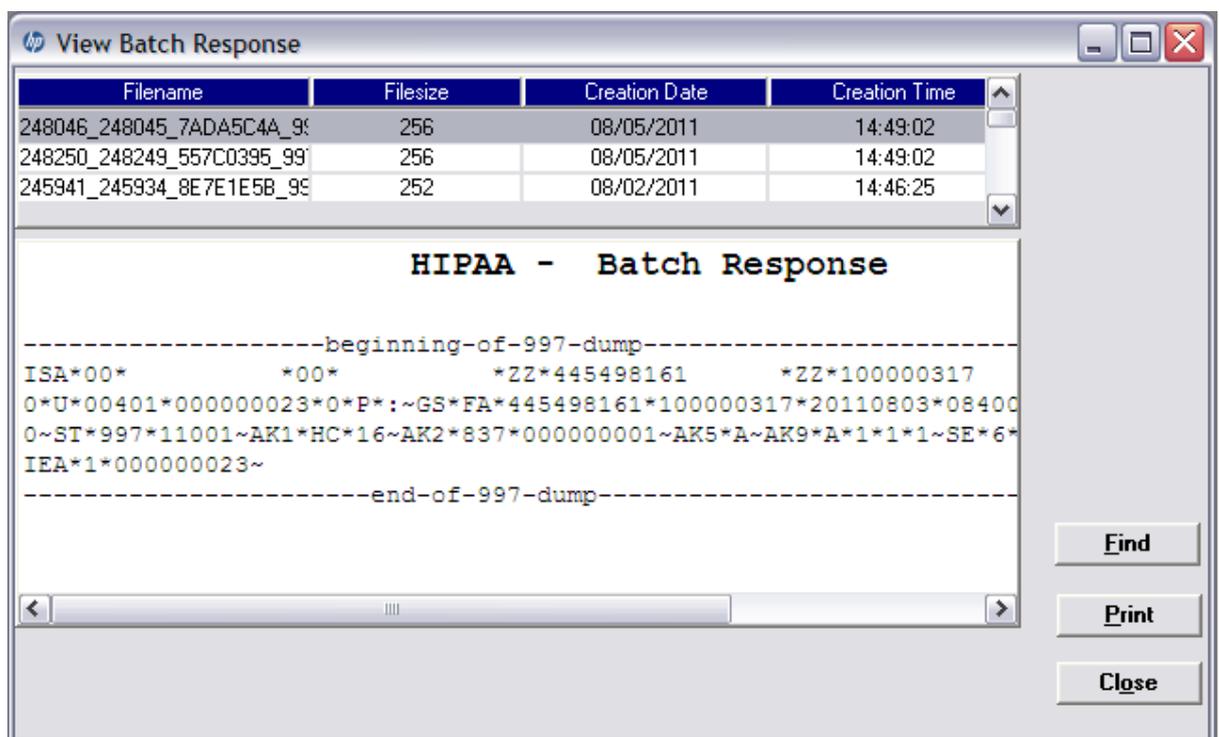
forms, they are ready to be resubmitted using the Submission option from the Communication menu.

Step 1 Place the cursor on the row showing the batch to be copied and select it by left clicking with the mouse. A list of the forms that were sent in that batch will appear in the bottom half of the window. By default, all of the forms are already selected.

- To copy the entire batch, click on the **Copy** button.
- To copy individual forms from the batch, select the **Deselect All** button and select the forms one by one by placing the mouse over the form and left clicking. Once the forms have been selected, select the **Copy** button.

The next message you will see tells you how many forms you have selected to be copied and that they will be ready for you to modify and/or submit.

View Batch Responses



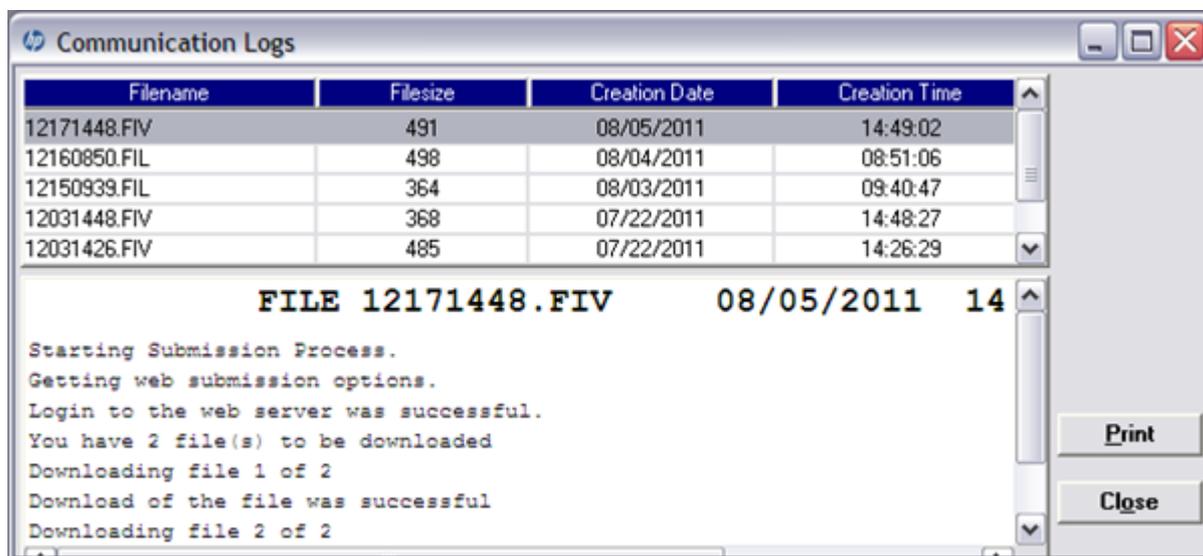
To view responses for 999 – Batch Response, 271 – Eligibility:Select **Communication** from the menu bar.

Step 1 Select **View Batch Responses**.

Step 2 Locate the batch submitted on the original submission date. All transactions submitted in the batch will be displayed on this report.

View Communication Log

The Communications Log is a useful tool for checking on submission information. It displays a list of files submitted along with the file size, creation date, and creation time. This information can be used to debug communication problems. Depending on the system options you have selected, up to 999 communication logs can be listed.



- Step 1** Select **Communication** from the menu bar.
- Step 2** Select **View Communication Log**. The Communication Logs window opens and displays a list of recent submissions.
- Step 3** Click on the file to be viewed. The submission information for the selected file will be displayed in the lower portion of the screen. You should see "Submission successful".
- Step 4** If you receive a submission successful message you will have an External Batch number that contains numeric characters.
- Step 5** Click on the **Print** button to print the log information.
- Step 6** Click on the **Close** button to close the Communication Log window.

Understanding the 999 Response Report

Use the 999 Response Report to determine why a batch was rejected. To better understand a 999, refer to the www.ctdssmap.com Web site and select Trading Partner/EDI and click on "How to read a 999", or you may contact the Provider Assistance Center at:

Provider Assistance Center.
 1-800-842-8440 toll free
 8:00 a.m. to 5:00 p.m. ET
 Monday - Friday (excluding holidays)

Reports

You can use the Reports option on the main menu bar to select and print a variety of forms including: eligibility requests, claims, and lists.

Some of the reports include the option to choose a detail report or summary report.

Detail Form Reports

A detail report contains all the fields for a particular form. You can print a copy of the contents of any form. Detail Form types include:

- 270 Eligibility Request
- 837 Institutional Nursing Home

- Step 1** Select **Reports**.
- Step 2** Select **Detail Forms**.
- Step 3** Select the desired form. At the new screen that comes up, you can narrow the report request by entering the batch number from the Communication Log file and/or client Medicaid Identification number.
- Step 4** Either click in **Form Status** and choose from Archived, Finalized, Incomplete, Pending or Ready, or enter the desired submission date in the 'Submit Date' field.
- Step 5** Select **OK** to run the report. The form will open and can be viewed on line or printed.
- Step 6** Select **Print** if you want to create a paper copy of the report.

Note If you don't specify any criteria before selecting OK, the following message will be displayed:

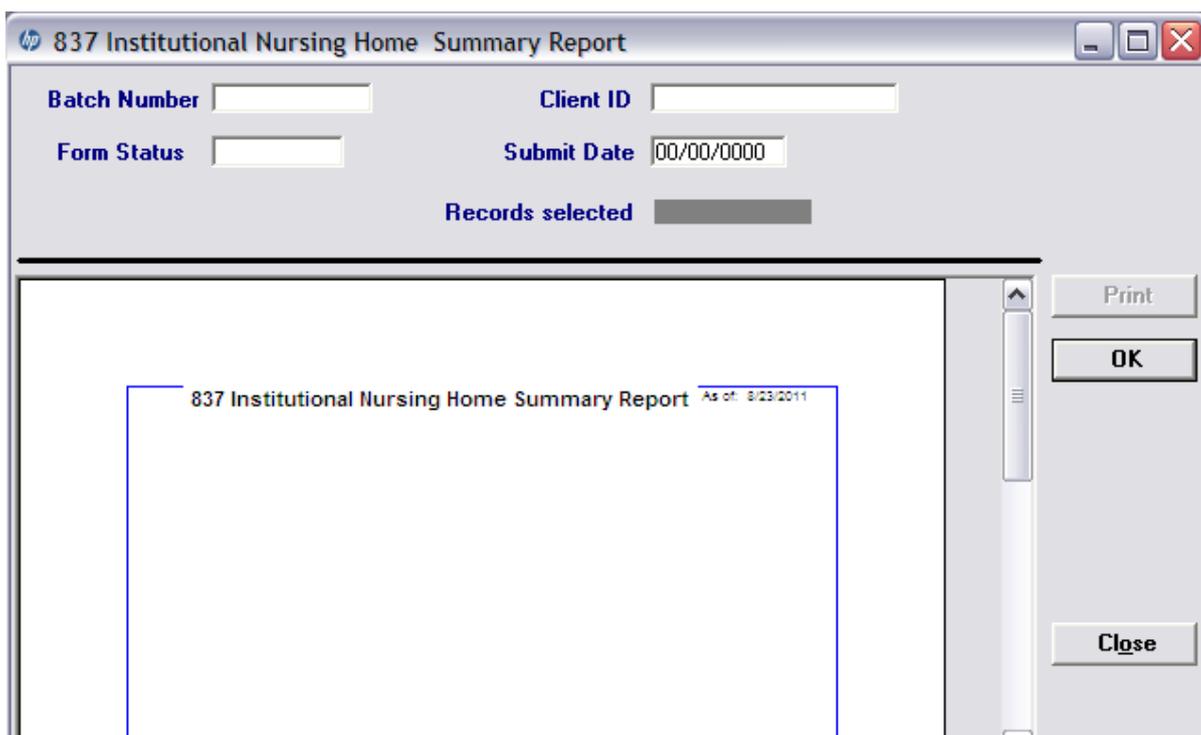


If you select OK on the error message, ALL of the forms on the database for that form type will be included in the report.

Summary Reports

You can use a summary report as an overview of a series of forms in a single report for easier viewing. A summary report lists only a few of the fields from the detail form. Summary reports are available for all form types supported by Provider Electronic Solutions. The available Summary Report types include:

- 270 Eligibility Request
- 837 Institutional Nursing Home



To create a Summary Report, follow the directions for Detail Form Reports, selecting **Summary Reports** in Step 2.

List Reports

List reports can be displayed on the screen or printed. Select the desired list from the Report drop down menu. All of the entries on the list will be displayed. Lists (also referred to as 'reference lists') include:

- Client
- Billing Provider
- Other Provider
- Taxonomy
- Admit Source
- Occurrence Code
- OI Reason
- Patient Status
- Place of Service
- Policy Holder

- Admission Type
- Carrier
- Condition Code
- Diagnosis
- Modifier
- Procedure/HCPCS
- Revenue
- Type of Bill
- Value Code

The screenshot shows a software window titled "Master Listing" with a "Listing Preview" section. The preview displays a table titled "Other Provider Detail Listing" with the following data:

Provider ID	Provider ID Code	Qualifier	Last/Org Name	Entity Type Code
SSN/Tax ID	SSN/Tax ID Qualifier		Taxonomy	
1111122222	XX		DOE	JC
123456789	34		204F00000X	1
Address Line 1				
Address Line 2				
City			State	Zip
1000 GRAND STREET			CT	061401234
1000000001	1D		GENERIC	D

The window also includes a "Print" button and a "Close" button.

Tools

The Tools Menu Options provides commands for:

- Archive
- Database Recovery
- Get Upgrades
- Change Password
- Options (the setup options you selected when you installed Provider Electronic Solutions)

The Security option on the Main Menu is also discussed in this section.

Archiving

Archiving is the process used to keep the size and space required by your data small enough for it to be useful to you, while maintaining a record of the forms you have entered.

When setting up the retention option under your personal options, you can choose how many days of history you want to keep online. The standard setting is 30 days; however, you may select the setting that best suits your needs.

When you create an archive, the system will copy any form you have submitted more than 30 days ago to a compressed file and then delete that form from the database. This is designed to make the management of forms easier and keep the space on the hard drive used by the application to a minimum. You may place the compressed archive file on a diskette or leave it on your hard drive.

Tip It is a good idea to save your archive files on CDs as a backup in case of catastrophic system failure.

Forms that are ready to be submitted will not be archived and will remain in the online database until you submit them or delete them with the **Delete** button. Forms that are incomplete and were created before the archive date will be deleted; these forms will not be saved in the archive file.

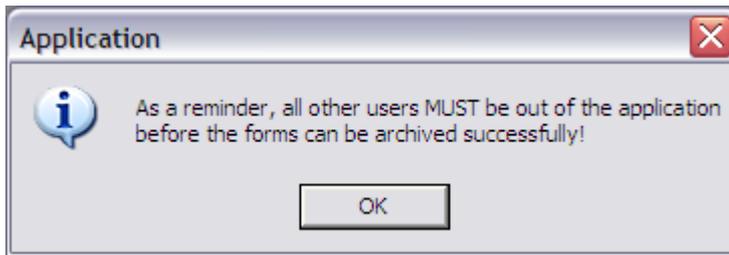
Creating a Form Archive

Step 1 Click on **Tools** on the menu bar and select **Archive**.

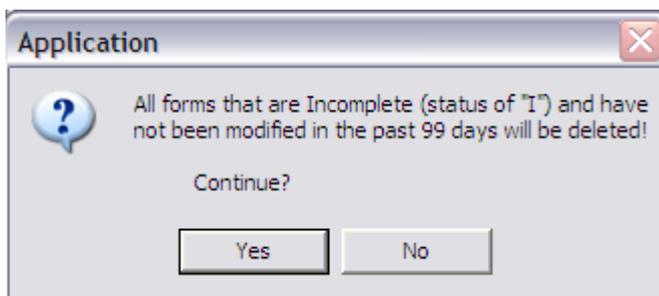
Step 2 Select **Create**. An informational message will display, reminding the user that other users must be out of the system before the archive is created.

Note If you are working in a network environment, and other users have access to Provider Electronic Solutions through the network, you will need to ask all of them to exit from Provider Electronic Solutions before archiving. If the software is installed on only one PC, you do not need to take any action.

Step 3 Once you have established that all users have exited from Provider Electronic Solutions, click **OK**.



Step 1 The next message displayed tells you that all forms that are incomplete and have not been modified will be deleted. Select **Yes** to continue or select **No**



to exit the archive setup.

Step 2 Select all transactions types to be archived or use the **Select All** button. You can select all the claim types or just the ones you wish to archive.



Step 3 You can change the default directory, the name of the file for the archive, and the number of days used to archive the forms. These changes will apply to this session only. If you want to change the number of days and have it apply to future sessions, go to **Options Retention** and select the desired number of days.

Select **OK** to complete the archive or **Cancel** to exit the archive function. If you select **OK**, a message displays, verifying that the archive was created.

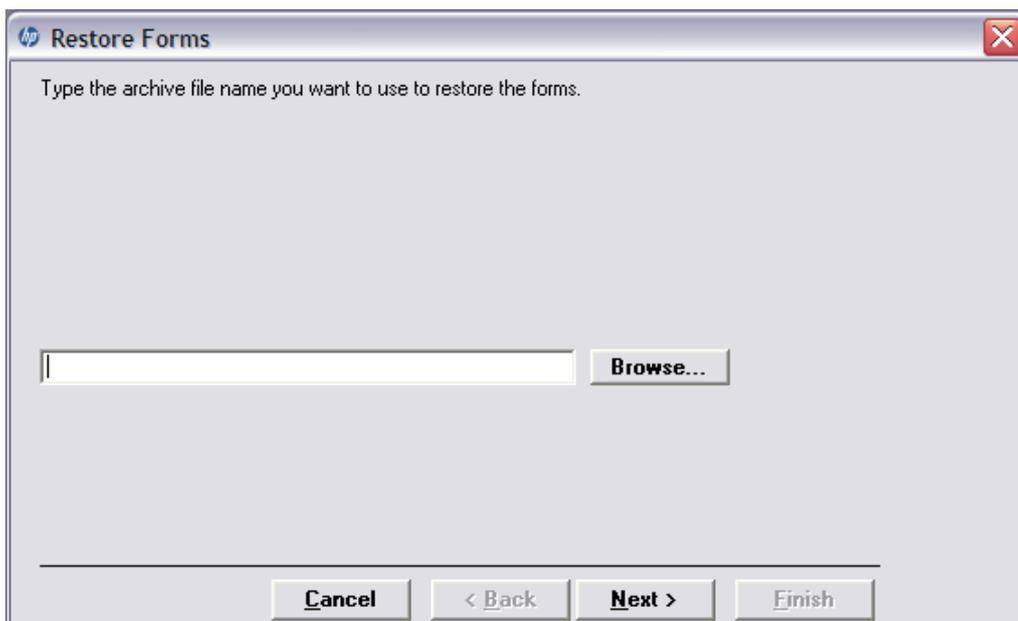
Step 4 Select **OK** to exit the Archive window once the process has completed.

Restoring an Archive

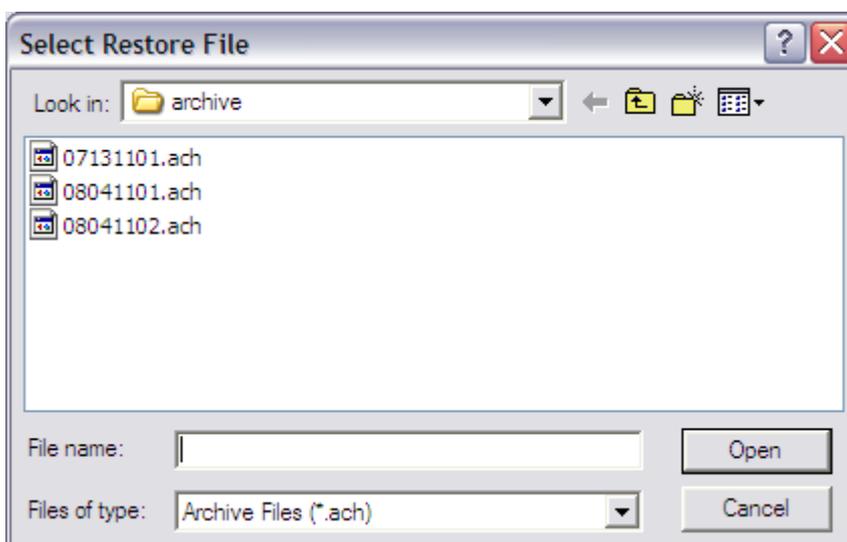
Use the Restore function to recall forms from an archive file and put them back into the on-line database. Forms that have been archived and then restored will have a status of A. You will not be able to change these forms; however, you can view them to confirm information, print them in a report, and copy them to create a new form to work with.

Step 1 Click on **Tools** on the menu bar and select **Archive**.

Step 2 Select **Restore**. The Restore Forms screen displays.



Step 3 Select the **Browse** button to select the file to restore. A new window will pop up called Select Restore File.



Step 4 Select the file to be restored and select **Open**. You return to the Restore window.

Step 5 Select **Next**. A list displays of the form types that are available to be restored.

Step 6 Highlight the type of form you want and select **Next**.

Note If the form type selected does not have any forms archived in the file, you will receive the following message: There are no forms to restore for the selected form type! Try another form type or a different restore file.

Step 7 Select **OK**. Highlight another form type or select Back to change the archive file to be restored.

Step 8 If there are available forms in the file to restore, they will be listed in the Restore Forms window.

Step 9 Select either **Restore all forms** or **Restore only selected forms**. If you want only selected forms, highlight the ones you want to restore. After you determine which forms you want to restore, select **Finish** to complete the process.

Client ID	Last Name	First Name	Billed Amount	Last Submit	Form type
001000000	JOHNSON	JOHN	5,952.00	8/3/2011	

Step 10 You will receive a confirmation message. Select **OK** to return to the main menu.

Database Recovery

There may be times when there is a problem with the database. This option is designed to help you work with Gainwell Technologies Help Desk personnel to fix problems with the database.

Compacting the Database

The compact database feature is used to make database files smaller and to better organize them. Every time you delete a form, empty space is created in the database where that form used to be. The compact database option will release the empty space so that it is available to use again.

All users must be out of the database if the software is set up in a network environment.

Repairing the Database

Repair database will attempt to validate all system tables and all indexes. Generally, this feature is helpful when the user is having trouble accessing their data. The Help Desk staff will help the user identify whether or not this is necessary. The user may use this feature any time they determine it would be helpful. Compact database is recommended after Repair database.

All users must be out of the database if the software is set up in a network environment.

Unlocking the Database

Sometimes errors will cause database locks. The database may lock when the user is submitting forms, archiving forms, restoring forms, and sometimes when adding or editing forms. Unlock will unlock the database tables.

Get Upgrades

Selecting the option, **Get Upgrades**, will check for application upgrades and download any new upgrades.

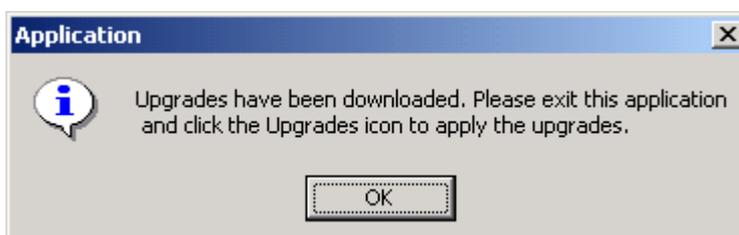
The user is occasionally prompted to check for upgrades when they log into the Provider Electronic Solutions program.

If you have installed the application on several PCs, you will need to copy the upgrade file to each PC and apply the upgrade individually.

Important: Always use the upgrade function to keep your Provider Electronic Solutions software current. Do not load a new version of Provider Electronic Solutions unless your software application has become corrupted and you are advised to do so by the Gainwell Technologies/EDI Help Desk. Re-installing the software application will erase all of the data in the lists and forms that you have created or updated.

Get Upgrades

- Step 1** Select **Tools** from the main menu
- Step 2** Select **Get Upgrades**.
- Step 3** After upgrade has completed, the following dialog box should appear.



- Step 4** Select **OK** to return to the Provider Electronic Solutions application.
- Step 5** Close the Provider Electronic Solutions application and follow the instructions to Apply Upgrade.

Apply Upgrade

- Step 1** Close Provider Electronic Solutions (if still open).
- Step 2** Select the **Start** button on your desktop and select **Programs**.
- Step 3** Select the option for **CT HP Provider Electronic Solutions** and select the option **Upgrades**. You will be prompted to exit all programs prior to continuing with the upgrade.
- Step 4** After exiting all programs, select **Yes** to the question to apply the upgrade. A series of questions will prompt you to move through the application of the upgrade.
- Answer the questions until the upgrade is completed. This usually takes less than one minute.
- Step 5** Selected **Finish**. After the upgrade is complete you may access the Provider Electronic Solutions application and continue your work as usual.

Passwords

All authorized users must have a password to access Provider Electronic Solutions. Passwords expire every 30 days unless otherwise indicated in the retention settings in the Tools<Options feature of Provider Electronic Solutions.

Password Rules

Passwords are not case sensitive. A password may be any combination of alphabetic, numeric, and special characters. A password must be at least 5 characters in length but no more than 10 characters.

Changing Your Password

The Change Password window allows a user to change their password. A user should change their password any time they believe their password may be known by an unauthorized person. When a password is changed, the date the password was changed is recorded.

A user is required to change their password after the number of days designated on the Options Retention setting has lapsed. The Change Password window will not allow a user to reuse their current password.

- Step 1** Select **Tools** and select Change **Password**.

hp Logon

Enter all fields to change a user password on the HP Provider Electronic Solutions (HIPAA) Application.

User ID

Old Password

New Password

Rekey New Password

Question

Answer

Rekey Answer

OK

Cancel

- Step 2** Enter the old password.
- Step 3** Create a new password that is 5 to 10 characters in length.
- Step 4** Enter the new password in the New Password field.
- Step 5** Re-enter the new password in the Rekey New Password field.
- Step 6** In the Question field, select the dropdown arrow. A list of three questions appears:
- What is your mother's maiden name?
 - What is your father's middle name?
 - In what city were you born?
- Step 7** Select one question.
- Step 8** Enter the answer in the Answer field. Answers are not case sensitive and you may use spaces.
- Step 9** Re-enter the answer in the Rekey Answer field.
- Step 10** Select **OK**.
- Step 11** The next message displayed is the 'User Password Successfully Updated' dialog box. Select **OK** to continue.

Password Help

If you forget your Provider Electronic Solutions password, you can use the password question to create a new password.

- Step 1** Select **Forgot Password** at the logon box.

hp Logon

Enter a User ID and password to log onto the HP Provider Electronic Solutions (HIPAA) Application.

User ID

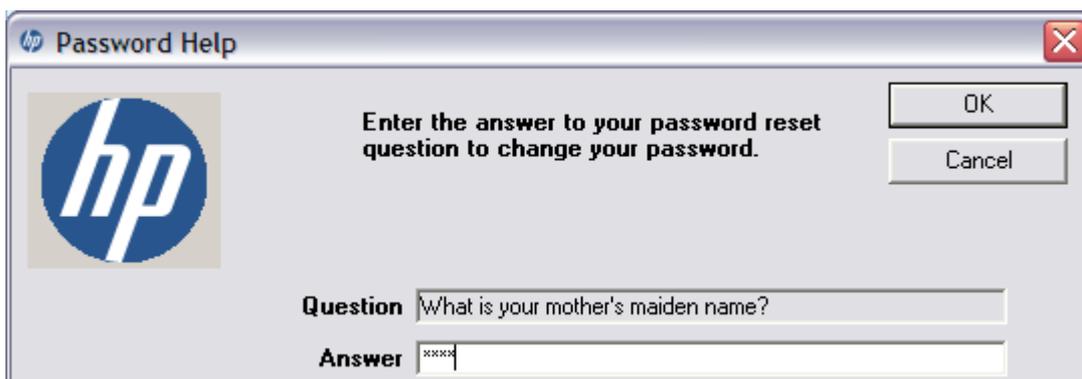
Password

OK

Cancel

Forgot Password

- Step 2** The Password Help box appears. Enter the correct answer. The answer is displayed in asterisks. Be sure that you type the answer correctly. You can make three attempts to answer the password question. Select **OK**.



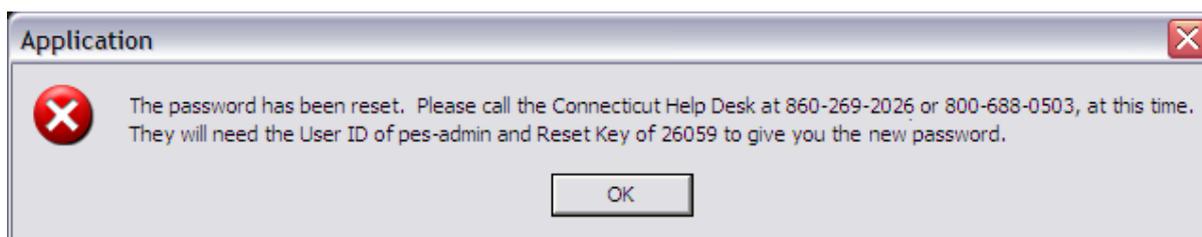
- Step 3** If you correctly answer the password question, you will be prompted to create a new password. After creating the new password and rekeying it, select **OK**. The Provider Electronic Solutions application opens.
- Step 4** If you incorrectly answer the password question three times, you will receive an application prompt asking if you wish to reset your password. Select Yes. The system creates a 5-digit reset key number. Write down this number for contacting the EDI Help Desk.
- Step 5** Select **OK**. The Provider Electronic Solutions application closes. See Using a Temporary Password to continue.

Using a Temporary Password

- Step 1** Call the EDI Help Desk.
1-800-688-0503 toll free
8:00 a.m. to 5:00 p.m. ET
Monday - Friday (excluding holidays)

You will need the following Information when calling to reset a password:

- Connecticut Medical Assistance program provider number
- Name
- User ID (from the Logon dialogue box)
- 5-digit reset key number (see the Application dialog box below)



- Step 2** The Help Desk will give you a temporary 8-alpha numeric character password.
- Step 3** Open the Provider Electronic Solutions application.
- Step 4** Enter the temporary password into the Logon Box password field. Select **OK**. The Provider Electronic Solutions application will now open.

Step 5 Select **Tools | Change Password** in the Provider Electronic Solutions toolbar to change your password and set up a new password question for possible future use.

Note It is strongly recommended that, immediately after logging in with a temporary password, the user set up a new password, question, and answer. See the Changing Your Password section in the Tools chapter for instructions.

Security

Provider Electronic Solutions provides added user security through the use of passwords and authorization levels.

Security Maintenance

The Security Maintenance window is only accessible by a user logged on with a valid User ID and password that was assigned administrative authority. The Security Maintenance window is used to:

- Assign additional User IDs
- Reset a password for a user
- Delete obsolete User IDs

Access the Security Maintenance screen by selecting Security and Security Maintenance.

User ID	Password	Authorization Level	Last Used
pes-admin	*****	3	08/23/11 12:14:41
			00/00/00 00:00:00

The Security Maintenance window initially opens with all fields blank. Selecting an existing user ID in the lookup will populate the User information. When a password is assigned or changed through Security Maintenance, the password is immediately set as expired and the user will be required to change their password the first time they log on.

Step 1 Enter the User ID for the individual to be given access to the software application. The user ID can be alpha or numeric or both.

Step 2 Enter a password for the new user.

Step 3 Select the Authorization Level drop down field and select the appropriate authorization level for the new user. If selecting **2** (User-Non Administrator), the user will not have access to the Security functionality from the main tool bar selection. At least one user or the Administrator must have a security level of 1 to be able to add, change or delete users.

Step 4 Select **Save** to save new user information or **Add** to add an additional user.

Note For a complete description of Options, refer to the Getting Started chapter.

Provider Electronic Solutions Installation

The Provider Electronic Solutions software is available on the Connecticut Medical Assistance Program Web site at www.ctdssmap.com

Note Windows NT and 2000 Pro Users with Windows NT or Windows 2000 Pro must have 'administrator' rights to install this software.

Provider Electronic Solutions may be installed on a computer's hard disk drive or on a network. When you begin the installation, you will need to choose between a **Typical** or **Workstation** installation. Choose **Typical** if you are installing the software on a personal computer or as a standalone. Choose **Workstation** if you are installing on a personal computer connected to a network and you wish to share a common database on the network. You may install Provider Electronic Solutions on as many PCs as needed.

For network installation, the database should reside on the server and the application can be loaded onto individual PCs. Choose **Typical** to install the database on the network making sure to specify a network path. Choose **Workstation** to install the application on all client PCs.

Equipment Requirements for Provider Electronic Solutions

Provider Electronic Solutions is designed to operate on a personal computer (PC) system with the following equipment requirements:

Minimum	Recommended
Pentium II	Pentium II
Windows 98, 2000/XP	Windows 2000, NT, XP, 7
Microsoft Internet Explorer 5.5 or greater	Microsoft Internet Explorer 5.5 or greater
64 MB RAM	128 MB RAM
800 X 600 resolution	1024 X 768 resolution
100 MB free hard drive space	100 MB free hard drive space
Printer with 8pt MS sans serif is preferred	Printer with 8pt MS sans serif

Note If you have a version of Internet Explorer below 5.5, contact Microsoft.

Installing Provider Electronic Solutions

This section describes how to install Provider Electronic Solutions on your computer or computer network. If you have never installed Provider Electronic Solutions, you will want to select the **Full Install** version option from the Provider Electronic Solutions Full Install link. If you have installed and used Provider Electronic Solutions, you will want to select the **Upgrade** option described in Upgrade Installation Instructions link.

The **Typical** option installs all of the Provider Electronic Solutions files, including the Provider Electronic Solutions database. This option is used when installing Provider Electronic Solutions on a standalone computer or an initial installation on a network server.

Installation on a Standalone Computer

Beginning the Installation

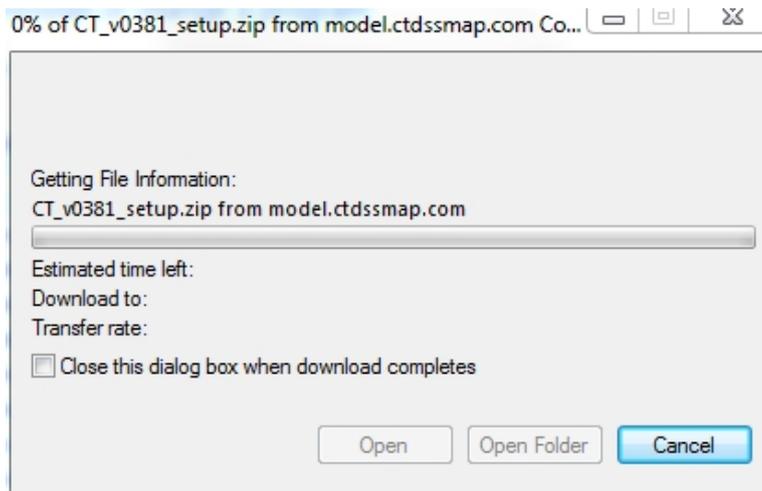
Step 1 Select the version you want to install from the Provider Electronic Solutions Full Install column.

Note It is recommended to install the newest 3.81 version.

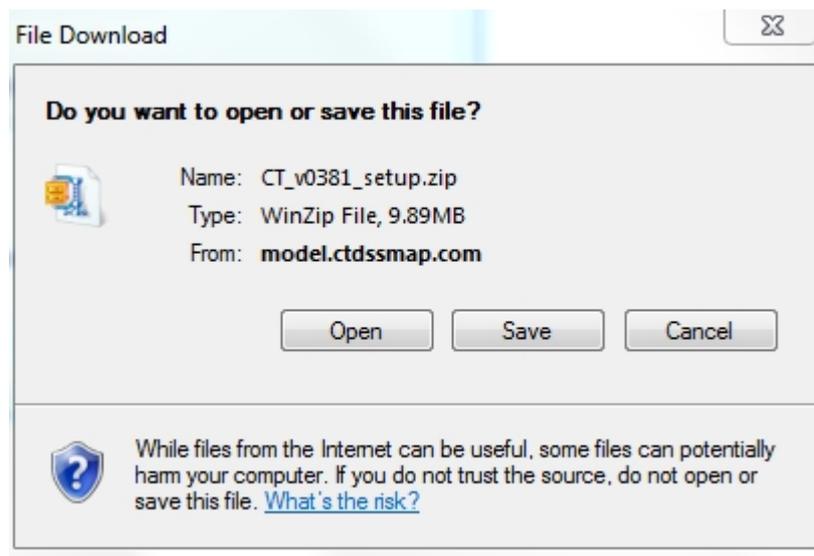
Provider Type	Provider Electronic Solutions Full Install	Provider Electronic Solutions Upgrade
All Providers	<p>Instructions for downloading Full Version of Provider Electronic Solutions 3.81</p> <p>Download version 3.81 for initial installation.</p>	<p>Download 3.81 upgrade (Newest upgrade) Note: You must be running version 3.80 prior to applying this upgrade.</p> <p>Warning: The 3.81 upgrade will remove the Professional, Dental, Inpatient, Outpatient/Home Health claim submission transactions and the claim status request transaction.</p> <p>Upgrade instructions via the Web.</p> <p>OR</p> <p>Upgrade Instructions via Provider Electronic Solutions</p> <p>Provider Electronic Solutions 3.81 Upgrade</p> <p>Provider Electronic Solutions 3.80 Upgrade</p>
Provider Electronic Software Material	<p>PES Handbook</p> <p>How to set up options tab: Acceptance Production</p>	<p>How to read a 999</p>

Step 2

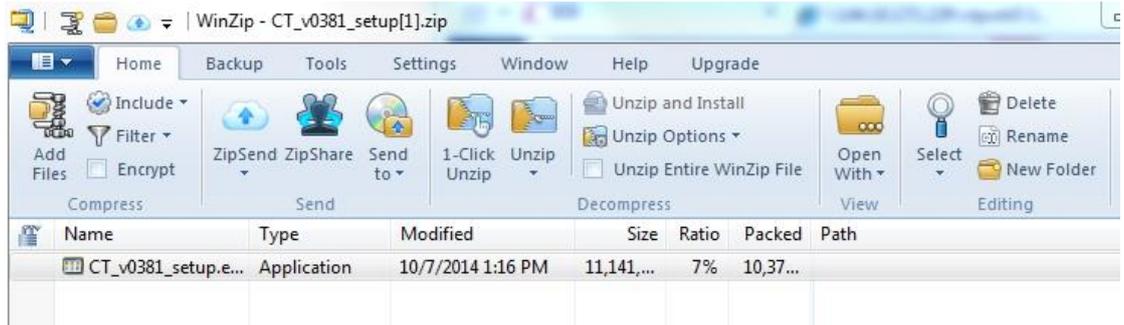
Step 2 The File Download screen displays. Click **Open**.



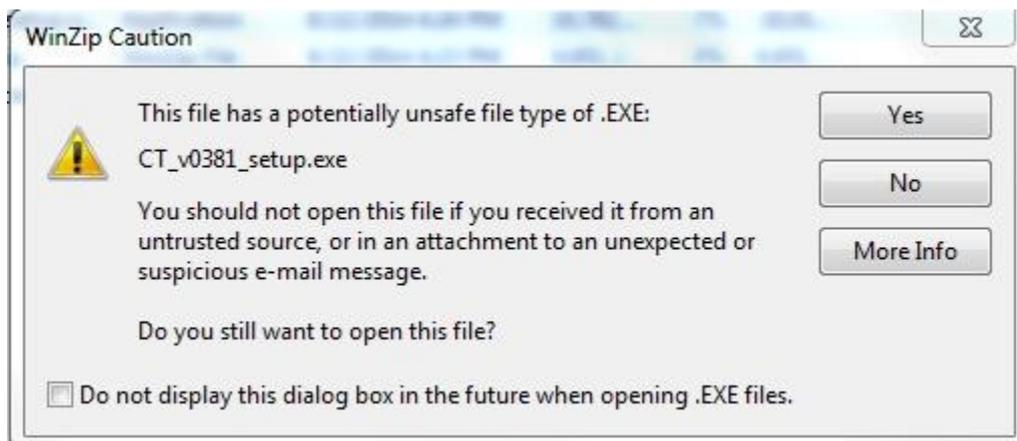
Step 3 The file will start to unzip. Let the file completely unzip.



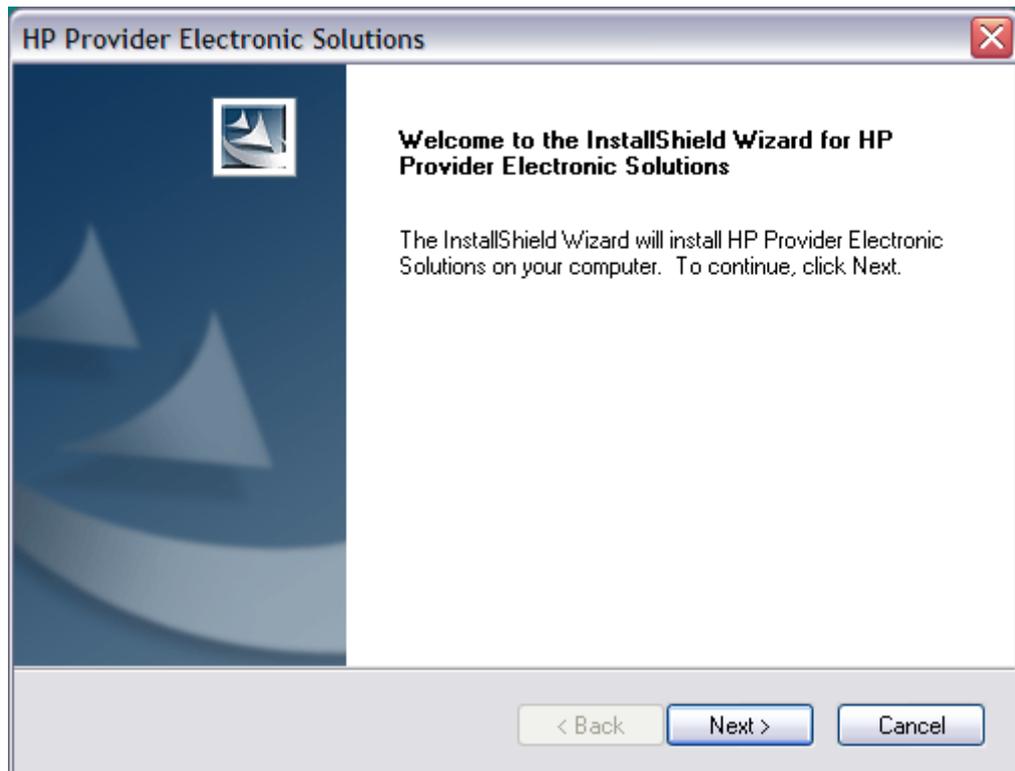
Step 3 CT_v0380_setup will display in the WinZip window. Double-click **CT_v0381_setup.exe**.



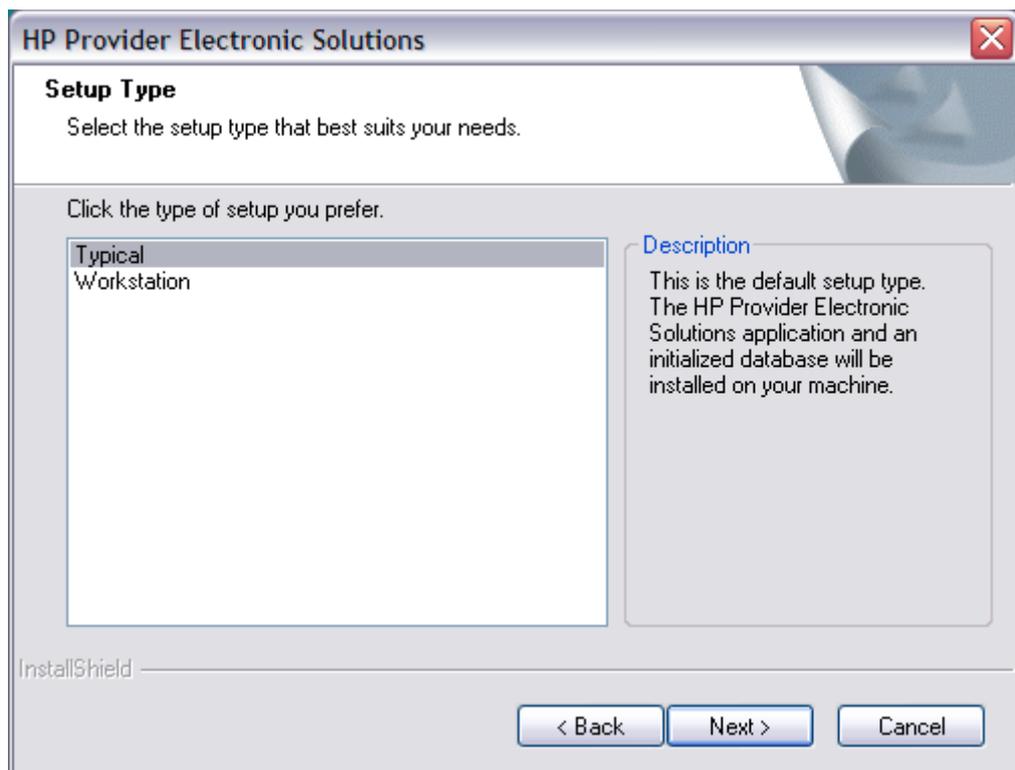
Step 4 WinZip Caution screen may display. Click **Yes**.



Step 5 The Welcome to the InstallShield Wizard screen displays. Click **Next**.



Step 6 The Typical setup will default and click **Next**.

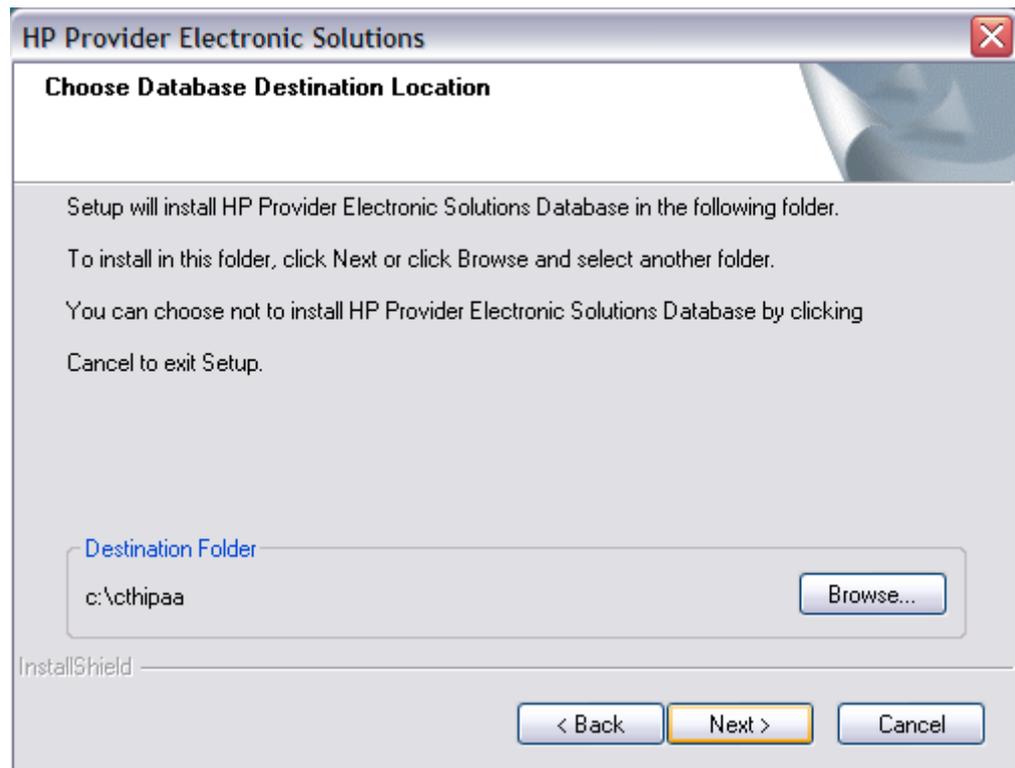


Step 7 Click **Next** to accept the default destination location for the software.

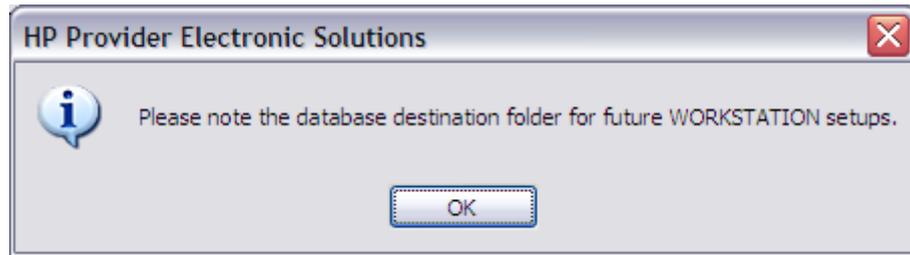
Tip 7 and 8 will default to C:\ on your computer.



Step 8 Click **Next** to accept the default destination for the database.



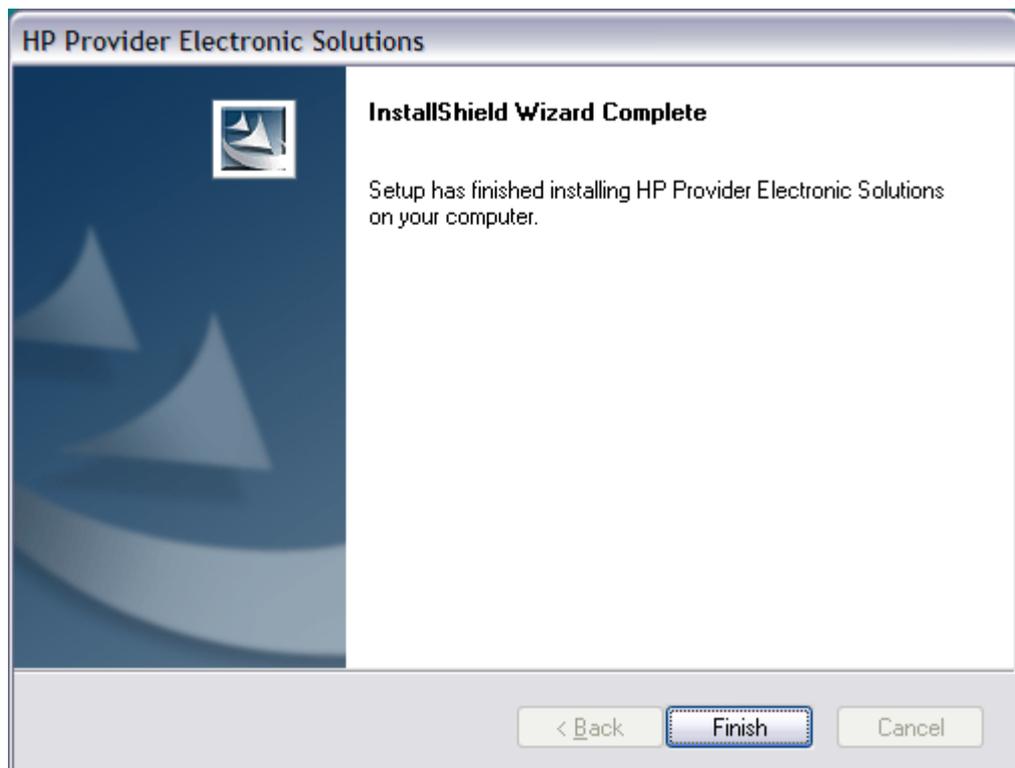
Step 9 A pop-up box displays to note the database destination folder for future workstations setups. Click **OK**.



Step 10 Will start the installing process. Let the installing process complete.



Step 11 When the installation is complete, click the Finish button to exit the installation.



Completing the Installation and Getting Started

When the installation is complete, a folder will be available on the user's desktop that contains two icons. A Provider Electronic Solutions icon to start the application and an Upgrade icon that checks for upgrades.

To start Provider Electronic Solutions double click the blue HP Provider Electronic Solutions icon in the folder labeled CT HP Provider Electronic Solutions or click on the **Start** button in the Windows menu bar and select **Programs**. Select **CT HP Provider Electronic Solutions** within the **CT HP Provider Solutions folder**.

Network Installation

To install the application for use by several users, you will need to perform a network installation. For a network installation, the Provider Electronic Solutions database can reside on the server and the Provider Electronic Solutions application can be installed on individual computers. You can install Provider Electronic Solutions on as many computers as needed.

The following instructions will install the shared Provider Electronic Solutions database on a network and the application on a computer.

- Step 1** Before you begin the installation, create a target directory on your network to hold the Provider Electronic Solutions database.
- Step 2** Follow procedures 1 through 5 of the installation instructions for a standalone computer. When prompted for the type of installation you want (Step 6), select **Typical** on the first computer. This will be the primary computer and will need to be upgraded first when upgrading the Provider Electronic Solutions software.
- Step 3** Select a target folder on the computer's C:\ drive or accept the default directory for the Provider Electronic Solutions application.
- Step 4** Select a target folder (i.e., a shared network folder or another disk) for the Provider Electronic Solutions database. Click **Next**.

Tip Make a note of the installation location for the Provider Electronic Solutions database; future computer installations will need to refer to this location.

- Step 5** A pop-up box displays to note the database destination folder for future workstation setups. Click **OK**.
- Step 6** When the installation is complete, click the **Finish** button to exit the installation.

Installation on Individual Computers on a Network

- Step 1** Follow steps 1 through 5 of the installation instructions for a standalone computer.
- Step 2** When prompted to select the type of installation (step 6), select **Workstation** and select **Next**.
- Step 3** Click **Next** to accept the default destination for the software.
- Step 4** Click **Browse** to select the target directory on the network in which you wish to locate the database. Click **OK**.
- Step 5** When the installation of the database on the network is complete, click on **Finish** to exit the installation.

Note You will need to perform Steps 1 through 6 on every workstation.

Upgrading Provider Electronic Solutions

This section describes how to upgrade Provider Electronic Solutions on your computer or computer network from the Connecticut Medical Assistance Program Web site at www.ctdssmap.com.

Upgrade for Standalone Computer

Beginning the Upgrade

Use these instructions to begin a standalone computer upgrade.

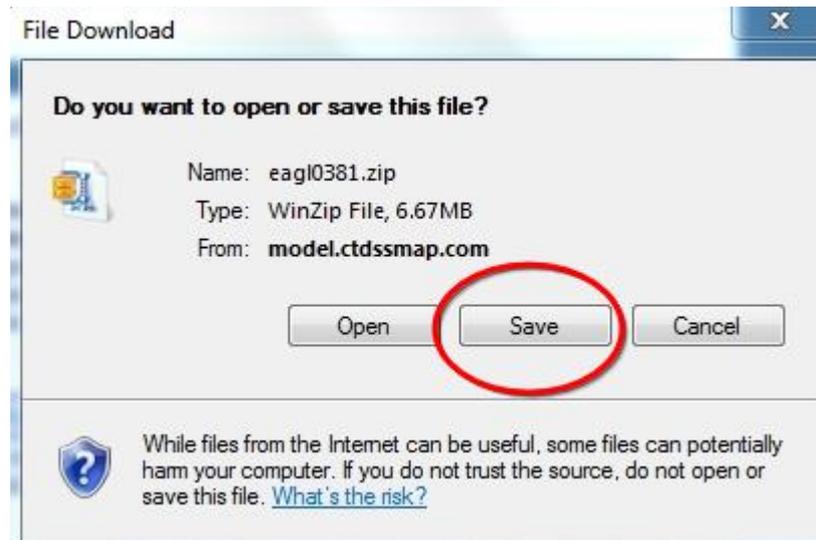
Important: Before upgrading, verify that Provider Electronic Solutions is closed.

Step 1 From the EDI Software window as shown below, click on Provider Electronic Solutions 3.81 Upgrade.

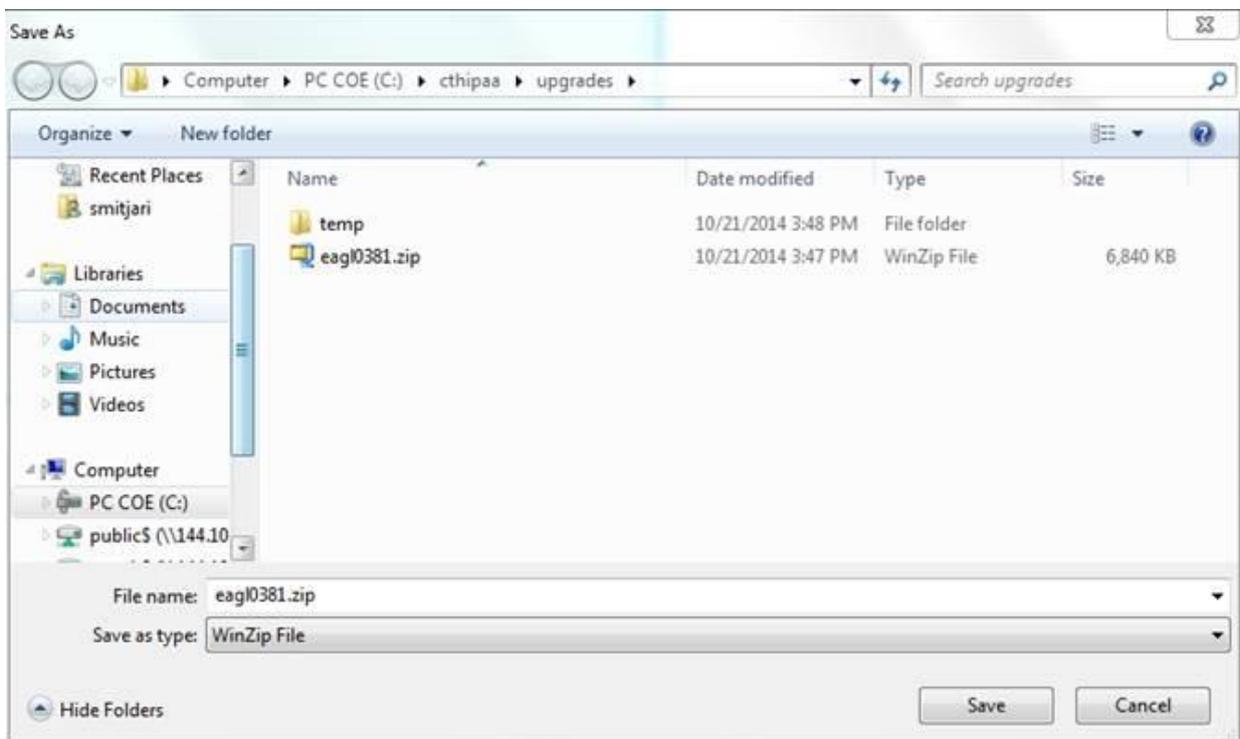
Note You must be running version 3.80 prior to applying version 3.81.

Provider Type	Provider Electronic Solutions Full Install	Provider Electronic Solutions Upgrade
All Providers	<p>Instructions for downloading Full Version of Provider Electronic Solutions 3.81</p> <p>Download version 3.81 for initial installation.</p>	<p>Download 3.81 upgrade (Newest upgrade) Note: You must be running version 3.80 prior to applying this upgrade.</p> <p>Warning: The 3.81 upgrade will remove the Professional, Dental, Inpatient, Outpatient/Home Health claim submission transactions and the claim status request transaction.</p> <p>Upgrade instructions via the Web.</p> <p>OR</p> <p>Upgrade Instructions via Provider Electronic Solutions</p> <p>Provider Electronic Solutions 3.81 Upgrade</p> <p>Provider Electronic Solutions 3.80 Upgrade</p>
Provider Electronic Software Material	<p>PES Handbook</p> <p>How to set up options tab: Acceptance Production</p>	<p>How to read a 999</p>

Step 2 The File Download screen displays. Click **Save**.



Step 1 System will prompt you to select a “save” location for the upgrade file. Navigate to the “cthipaa\upgrades” folder on your computer hard drive (default location: C:\cthipaa\upgrades) and click **Save**.

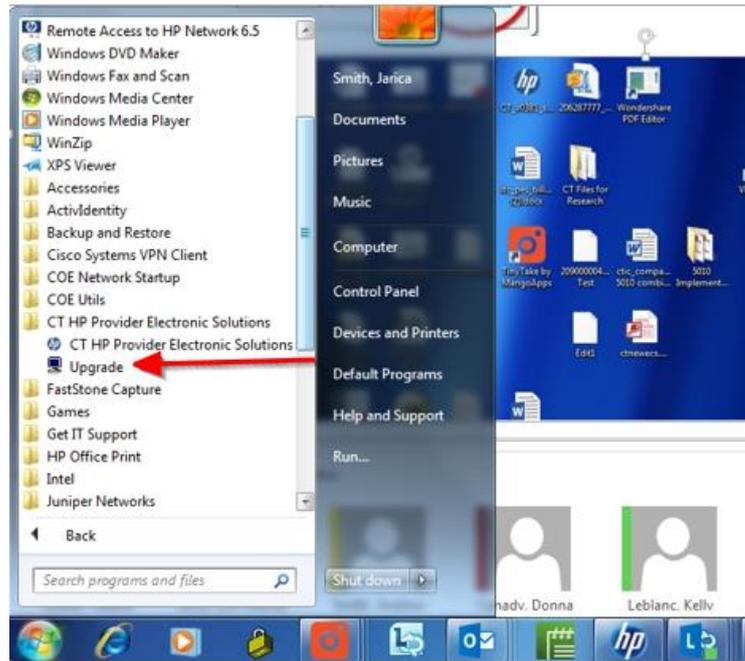


Note Examine figure carefully and make sure the window looks like the example show. Saving the file in the proper directory will ensure a successful upgrade.

Apply Upgrade

Step 1 Close PES (if it is currently running)

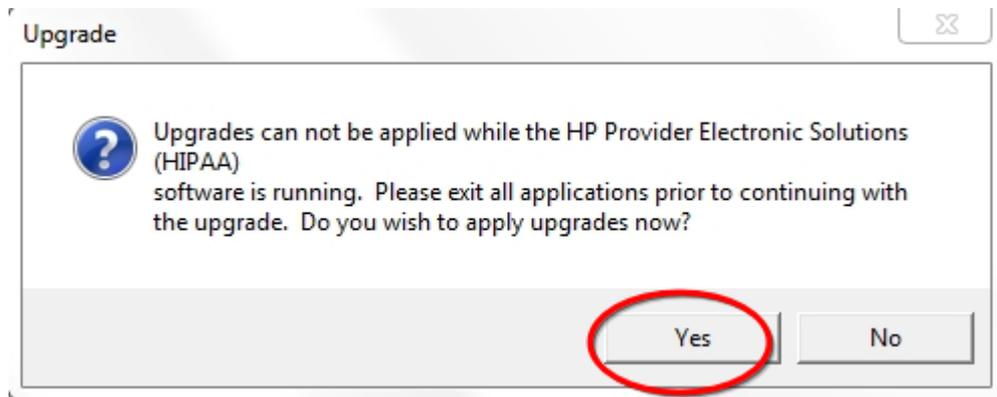
Select the Start button in the lower left of your desktop, and then select **All Programs > CT HP Provider Electronic Solutions > Upgrade**.



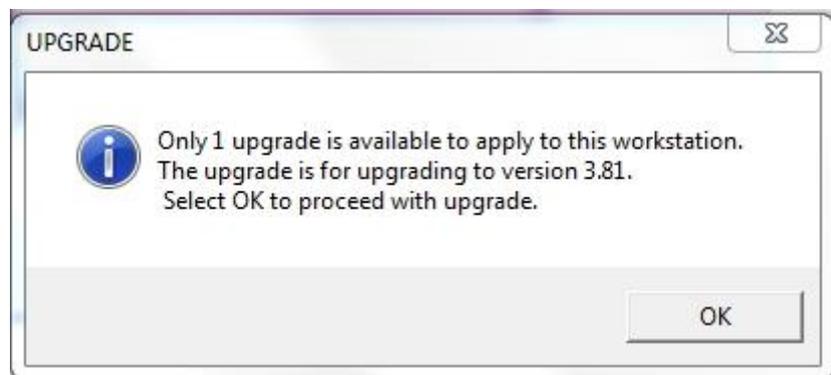
Step 2 Or you can double-click the **CT HP Provider Electronic Solutions** folder on your desktop to locate the **Upgrade** option/icon. Double-click the **Upgrade** icon.



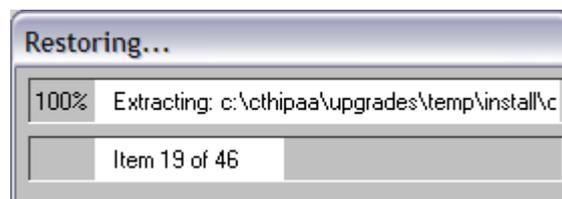
Step 3 You will be prompted to exit all applications prior to continuing with the upgrade. Click **Yes** to proceed.

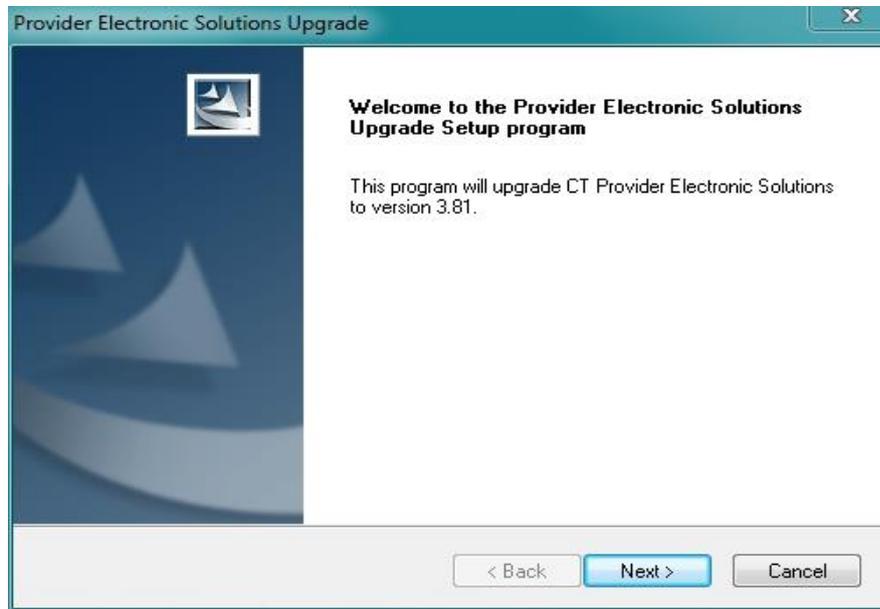


Step 4 A message displays, indicating that you have 1 upgrade to apply. Click **OK** to proceed with the upgrade.



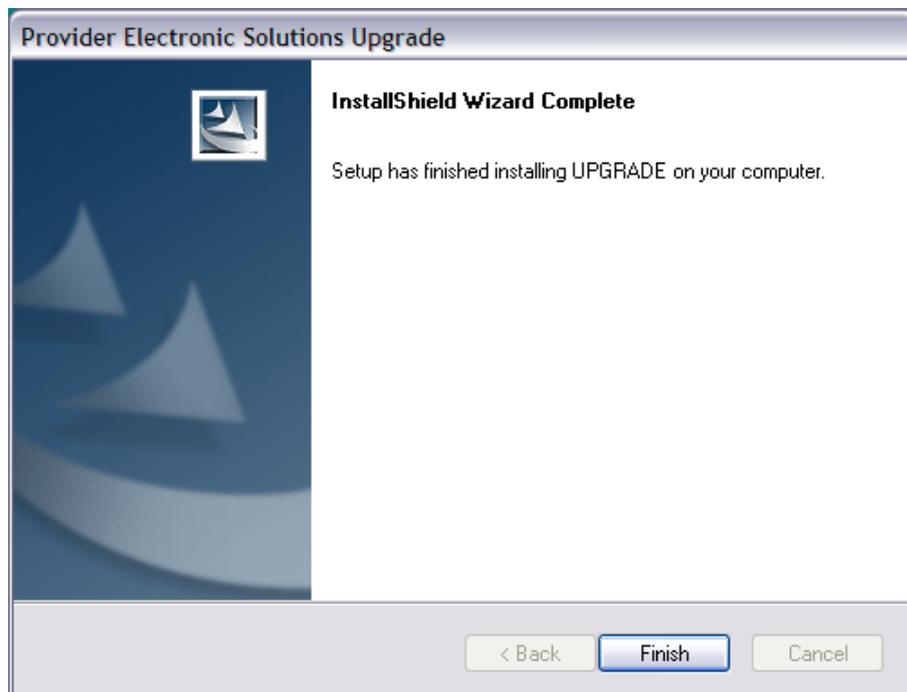
Step 5 The *Upgrade* application will extract the necessary temporary files and prepare to perform the upgrade.

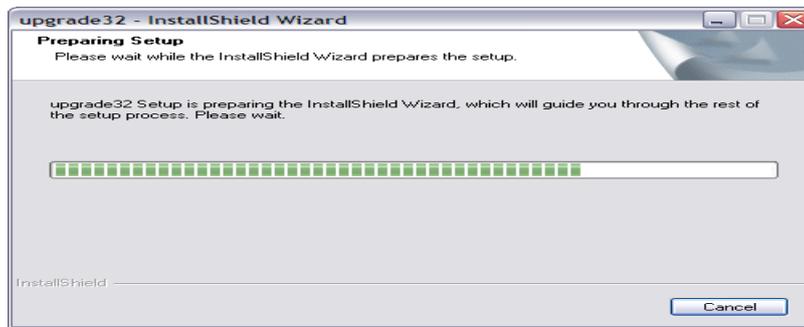




Step 6 An upgrade message displays to confirm the upgrade to PES version 3.81. Click Next.

Once the upgrade is completed a final message displays. Click **Finish** to exit the application.





Upgrade for Network Install

Important: When applying an upgrade in a network environment, make sure that you upgrade all PCs running Provider Electronic Solutions (primary or **Typical** first, then **Workstations**). This will ensure that all copies of the Provider Electronic Solutions remain synchronized. To ensure the upgrade is successful, verify the following:

- No one is using the database at the time the upgrade is being applied
- All PCs running the application are upgraded
- The database is upgraded first

Step 1 Locate the (primary or **Typical**) install. This is where the database resides.

Step 2 Follow the steps for Upgrade for Standalone Computer (Steps 1 through 5) and (Steps 1 through 6) for Apply Upgrade.

Step 3 Once you have upgraded the primary or **Typical** database, you can begin the workstation upgrades.

Step 4 You will need to copy the upgrade file eaglXXXX.zip, (where XXXX is the version upgrade number) to each computer and apply the upgrade individually.

Get Upgrades from Provider Electronic Solution Software

This section describes how to upgrade Provider Electronic Solutions on your computer or computer network from the Provider Electronic Solutions software with the "Get Upgrades" option.

Get Upgrades

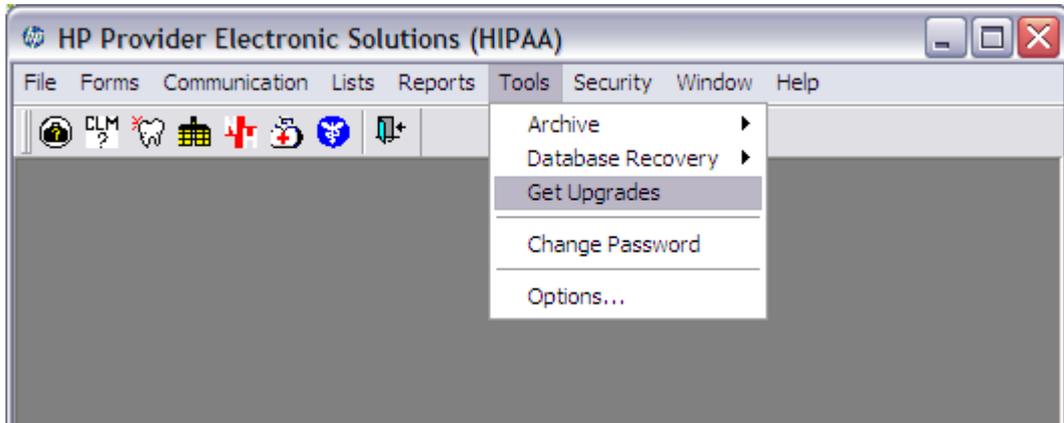
Use these instructions to begin the download process of the Provider Electronic Solutions Upgrade.

The user is occasionally prompted to check for updates when they log into the PES program.

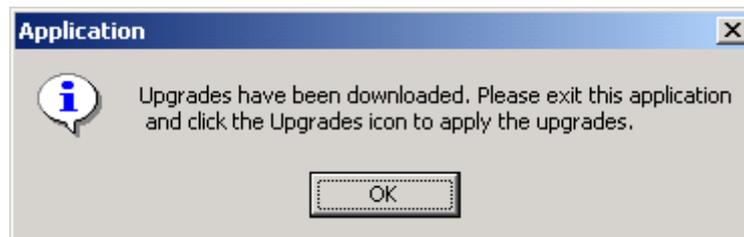
If you have installed the application on several PCs, you will need to copy the upgrade file to each PC and apply the upgrade individually.

Step 1 Open the Provider Electronic Solutions software.

Step 2 Select **Tools** from the main menu, then select **Get Upgrades**.



Step 3 After Upgrade has been downloaded, the following dialog box should appear. Click **OK**.



Step 4 Exit the Provider Electronic Solutions software.

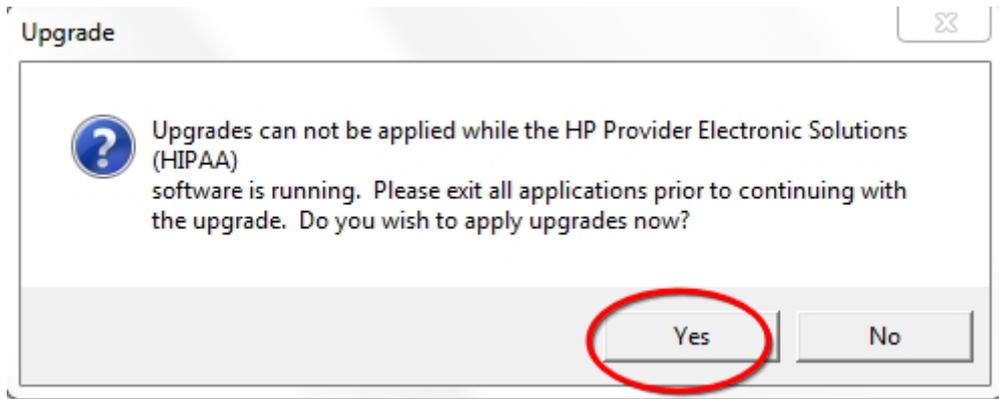
Apply Upgrade

Step 1 Close PES (if it is currently running)

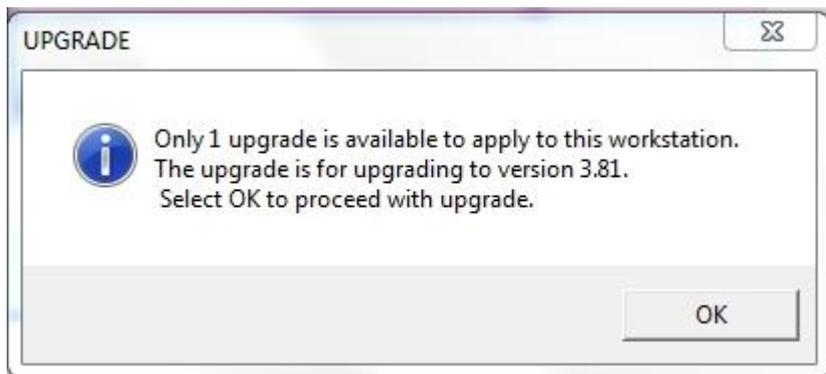
Step 2 Select the Start button in the lower left of your desktop, and then select **All Programs > CT HP Provider Electronic Solutions > Upgrade**.

Or you can double-click the **CT HP Provider Electronic Solutions** folder on your desktop to locate the **Upgrade** option/icon. Double-click the **Upgrade** icon.

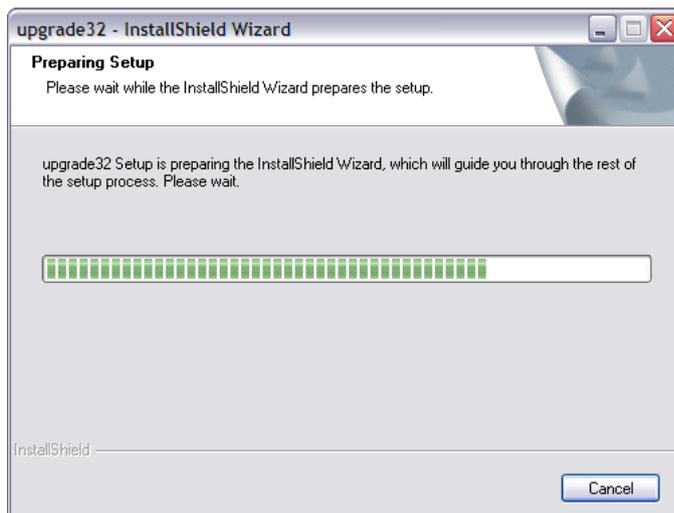
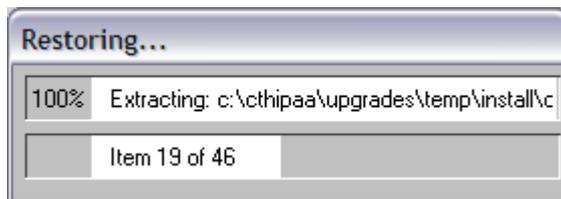
Step 3 You will be prompted to exit all applications prior to continuing with the upgrade. Click **Yes** to proceed.



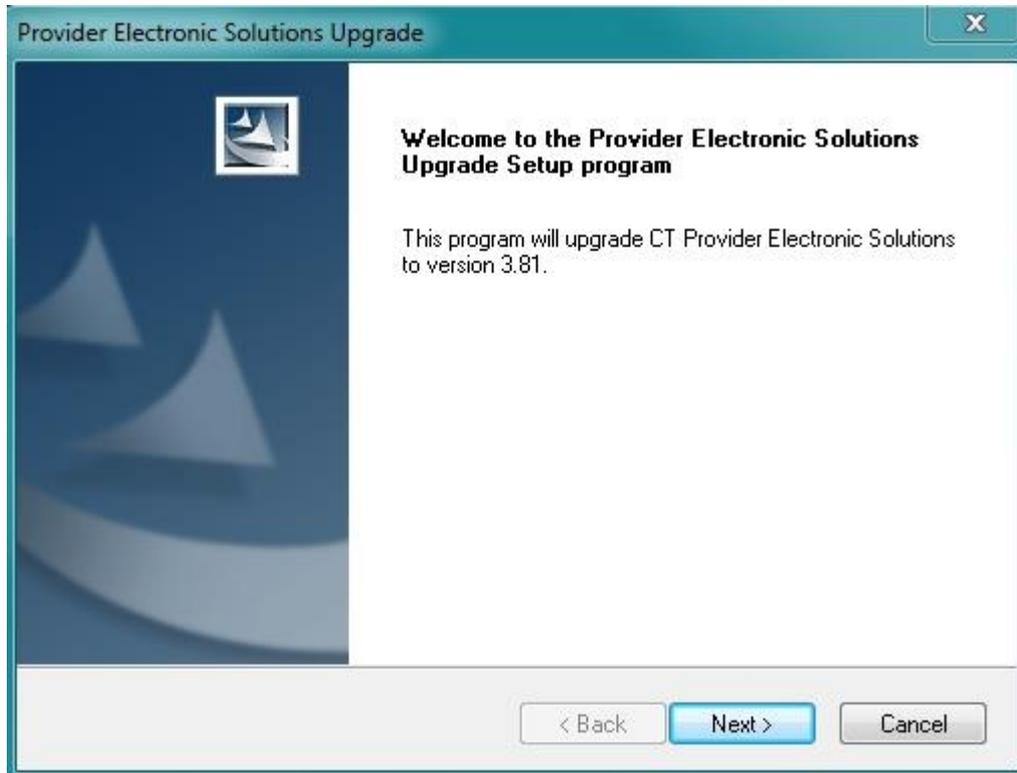
Step 4 A message displays, indicating that you have 1 upgrade to apply. Click **OK** to proceed with the upgrade.



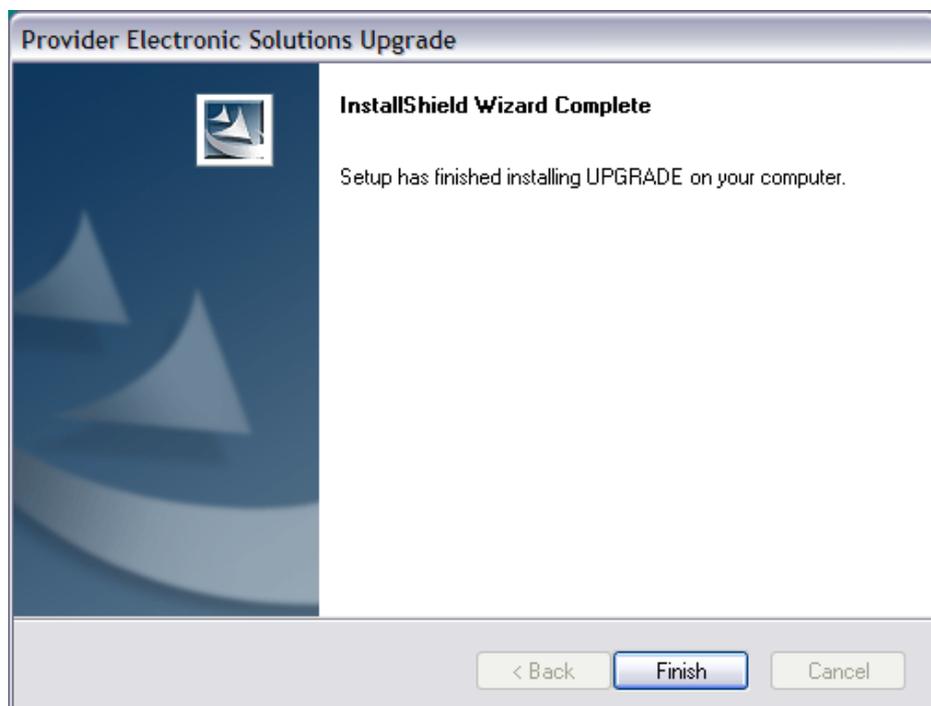
Step 5 The *Upgrade* application will extract the necessary temporary files and prepare to perform the upgrade.



- Step 6** An upgrade message displays to confirm the upgrade to PES version 3.XX (where "XX" indicates the version installed). Click **Next**.



Once the upgrade is completed a final message displays. Click **Finish** to exit the application.



Upgrade for Network Install

Important: When applying an upgrade in a network environment, make sure that you upgrade all PCs running Provider Electronic Solutions (primary or **Typical** first, then **Workstations**). This will ensure that all copies of the Provider Electronic Solutions remain synchronized. To ensure the upgrade is successful, verify the following:

- No one is using the database at the time the upgrade is being applied
- All PCs running the application are upgraded
- The database is upgraded first

Step 1 Locate the (primary or **Typical**) install. This is where the database resides.

Step 2 Follow the steps for Get Upgrades (Steps 1 through 5) and Apply Upgrades (Steps 1 through 6).

Step 3 Once you have upgraded the primary or **Typical** database, you can begin the workstation upgrades.

Step 4 You will need to copy the upgrade file eaglXXXX.zip, (where XXXX is the version upgrade number) to each computer and apply the upgrade individually.

Appendix A - Provider Electronic Solutions Troubleshooting

This appendix offers solutions to problems you may encounter when using the Provider Electronic Solutions program. Provider Electronic Solutions Error Messages are messages that pop-up while using Provider Electronic Solutions. The Provider Electronic Solutions Communication Log has specific information on claims that are rejected before processing.

Provider Electronic Solutions Error Messages

Performing these steps can solve many problems and often eliminate the need for telephone assistance. If you receive an error message that is not on this list, contact the Provider Assistance Center at:

1-800-842-8440 toll free
 8:00 a.m. to 5:00 p.m. EST
 Monday - Friday (excluding holidays)

	Error Message	Action To Take
1.	Application version greater than Database version	<p>This message may occur when opening Provider Electronic Solutions in a network installation.</p> <p>For the network administrator:</p> <p>Confirm a network installation.</p> <p>Check to see that the PCs were installed properly for a network setup. 1st PC set up as Typical Install; the remainder set up as workstations. (Note that the software is always installed on the local hard drive, while only one copy of the database is on the network.)</p> <p>Check one/all pbuser.ini files. The dbpath should be set to the drive where the database was installed. Also make sure there are not any back slashes at the end of the dbpath line.</p> <p>The version in the ecs.ini file is greater than the version in the db.ini file. Make sure that both of those files share the same version number.</p>
2.	Server name could not be resolved.	<p>This message is due to the user not being connected to the internet prior to selecting the submit option. The user must log into the internet prior to selecting the submit option.</p>
3.	Cannot lock the (claim type) table	<p>To unlock the database, go to Tools Database Recovery Unlock. See Section Tools chapter for complete instructions.</p> <p>After unlocking the database, resume claim</p>

	Error Message	Action To Take
		submission.
4.	Cannot open log file	There may not be enough resources available. Close other applications and try again. Log out of the Provider Electronic Solutions program and log back in.
5.	Commit failed while trying to update the user table, return code is -1.	If working on a network, the network administrator with Administrator rights on the local machine must change the database for the user to have both read and write permissions.
6.	Could not update the key sak. The sequel code was -1.	The user doesn't have write permission on the network and cannot save any claims to the database on the network. The network administrator will have to give the user the necessary permissions.
7.	Failed to back up the database files	Shutdown and restart the computer.
8.	Formatting eligibility batch Note: This is a communication log message. To view the communication log, go to Communication View Communication Log.	Ensure that the installation was Typical, not Workstation. Also see error 1, Application version greater than Database version. There are too many applications open. Close other applications and try again. The file in the temp directory might be open. Ensure that all fields in Tools Options are correct. See the Getting Started section in the Provider Electronic Solutions Handbook for instructions.
9.	Modem Type/Logon ID/ Password is missing.	Options need to be set up. Go to Tools Options. See the Getting Started section in the Provider Electronic Solutions Handbook for instructions.
10.	The database has been locked by another user	If the installation is on a network, first verify that another user is not currently updating the same claim. Go to Tools Database Recovery Unlock to unlock the Database. See the Tools section. Resume claim submission.
11.	Unable to Connect to database	If using Windows NT, the user will not have permission to either change files in the install folder (for example, C:\cthipaa folder) or to subordinate folders. The Network Administrator with rights on the local machine must grant these rights to the user. Gainwell

	Error Message	Action To Take
		Technologies does not handle security issues such as this.
12.	Unable to update the SAK	This message may occur after installing McAfee anti-virus. The only known solution is to uninstall the McAfee anti-virus program.