

Provider Electronic Solutions Upgrade Instructions

Get Upgrades from Provider Electronic Solutions Software

This section describes how to upgrade Provider Electronic Solutions (PES) on your computer or computer network from the Provider Electronic Solutions software with the **Get Upgrades** option. ****This option will only work if you have to upgrade by one version (you must currently be running PES version 3.80).** If you need to upgrade several versions, please refer to the upgrade instructions for the Web. If you are not certain what version you are running, open PES and in the main menu click on **Help**, then **About** to locate the version number.

As part of the PES HIPAA 5010 conversion, all claims that are in a status of **R** (Ready) or **I** (Incomplete) will be deleted from the PES database when the 3.81 upgrade is installed. Therefore, it is highly recommended that PES users submit all transactions in a status of **R** prior to installing the 3.81 upgrade.

It is also highly recommended that you secure a copy of your PES database before this or any upgrade to PES. The PES database is named "ctnewecs.mdb" and with a typical install is located at c:\cthipaa. Providers with PES installed on their network may house their PES database in another location. Providers may need to contact their system administrator for assistance with the backup process.

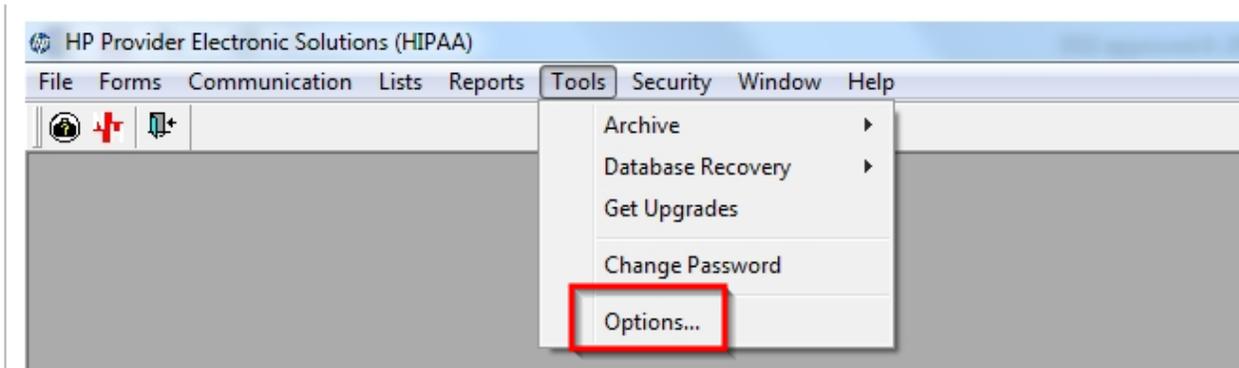
WARNING:

Please note: A **FULL** installation should **ONLY** be used if you have **NEVER** used PES before. If a full installation is downloaded to a PC that has an existing PES database installed, the entire database will be lost (overwritten with a BLANK database.) To preserve your existing database you must UPGRADE.

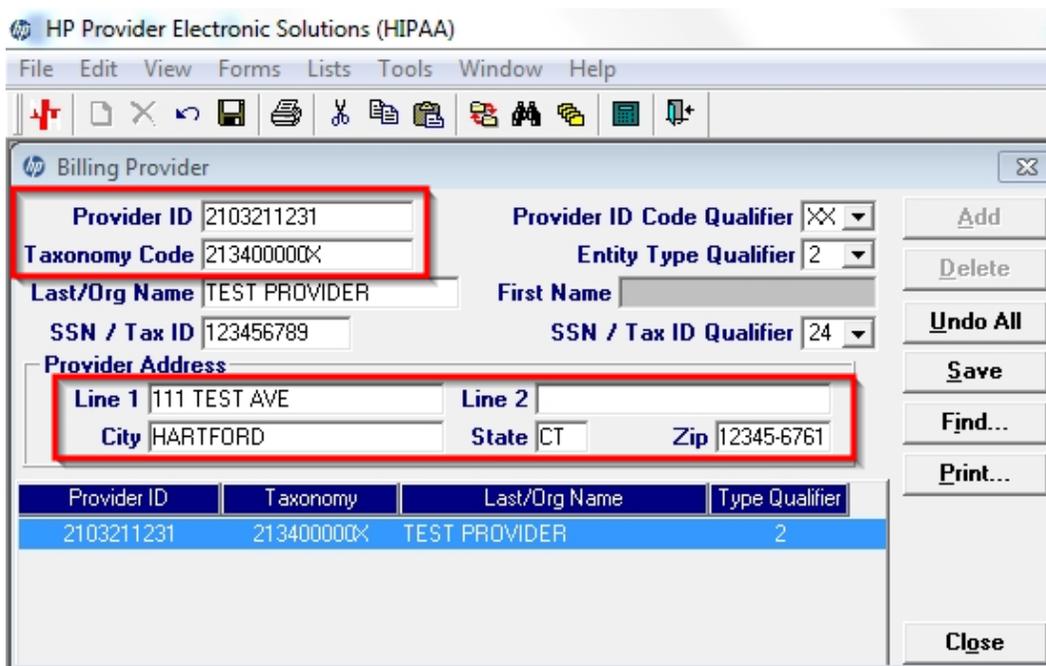
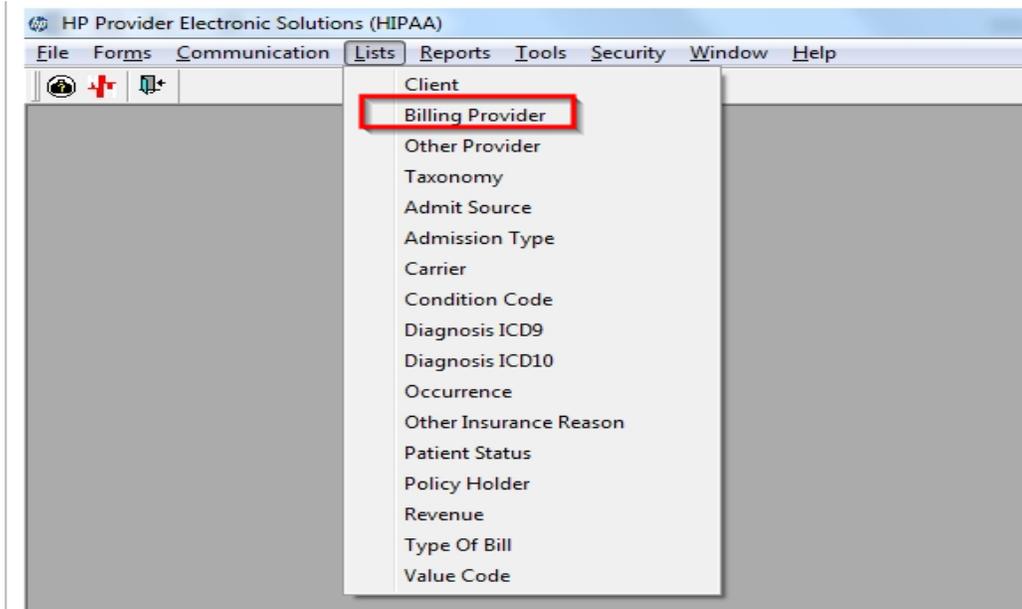
***Note:** This software will no longer support Professional, Dental, Inpatient, Outpatient/Home Health claim submission transactions as well as the claim status request transaction effective October 1, 2015. Current PES users are encouraged to transition to an alternative method of claim submission and claim status.*

Please Note: In order to ensure that transactions sent through PES 3.80 are fully HIPAA 5010 compliant, there are a few changes that need to be made prior to upgrading the PES application:

- On the PES *Main Menu* click **Tools** and then select **Options**
 - Make sure that the *Contact Phone #* listed in the *Batch* tab does not contain any spaces, parentheses, or hyphens.

The image shows the 'Options' dialog box with the 'Batch' tab selected. The fields are as follows:
Trading Partner ID: 100000326
Web Logon ID: T100000326
Web Password: [masked with asterisks]
Entity Type Qualifier: 2 (dropdown menu)
Last/Org Name: TEST BATCH
First Name: [empty field]
Contact Phone #: 5555555555
On the right side, there are buttons for Help, Print, OK, and Close.

- On the *Main Menu* click **Lists** and then **Billing Provider**. For each listed provider you must verify that:
 - The *Provider ID* field contains the provider's correct NPI number or Medicaid ID.
 - The *Taxonomy Code* on file is the taxonomy code the provider used to enroll with the CT Medical Assistance Program.
 - If you have a provider listed without an NPI number, the *Taxonomy Code* field is left blank.
 - The *Provider Address* fields (*Line 1* and *Line 2*) do not contain a P.O. Box.
 - The *Zip* code is 9 digits in length (zip+four format).



These same checks must be done to all entries in the **Other Provider** list.

Upgrade for Network Install

Important: When applying an upgrade in a network environment, make sure that you upgrade all PCs running PES (primary or **Typical** first, then **Workstations**). This will ensure that all copies of PES 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** installation of the PES software; this is where the database resides.

Step 2 Follow the steps for *Upgrade for Stand Alone Computer* (Steps 1 through 4) and *Apply Upgrades* (Steps 1 through 7).

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

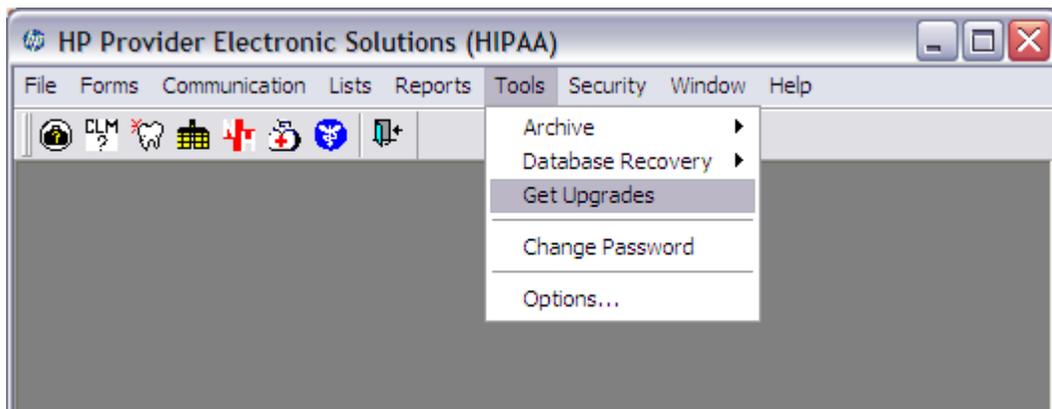
It is important that *all* networked installations of PES be upgraded before any users log back into the software and begin to modify the database or submit claims and inquiries.

Upgrade for Standalone Computer from PES Software

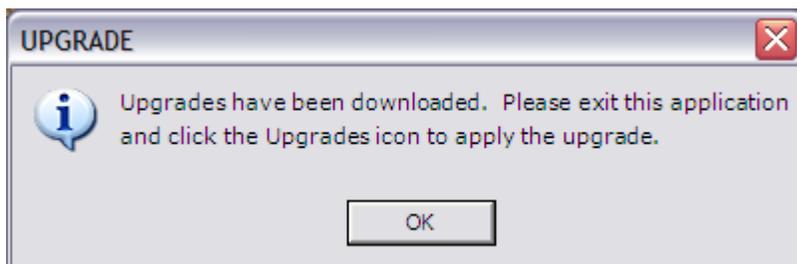
Get Upgrades

Use these instructions to begin a standalone computer upgrade.

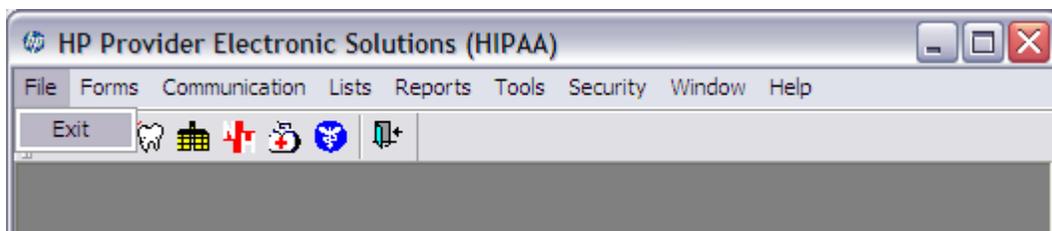
- Step 1** Open the Provider Electronic Solutions software.
- Step 2** Select **Tools** from the main menu, then select **Get Upgrades**.



- Step 3** After the upgrade has been downloaded, the following dialog box will appear. Click **OK**.

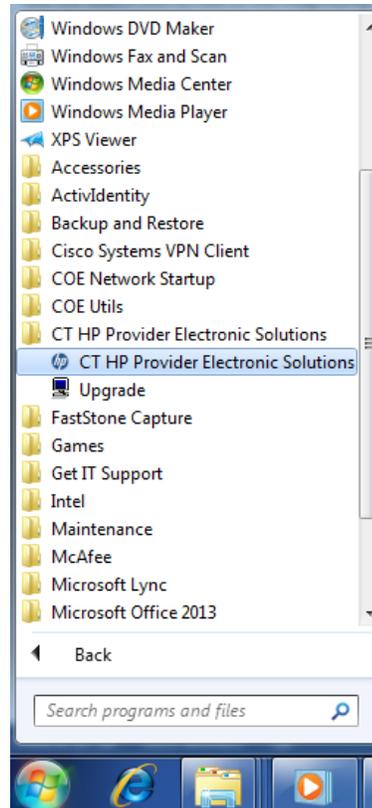


- Step 4** Exit the PES software. Proceed to **Apply Upgrade**.

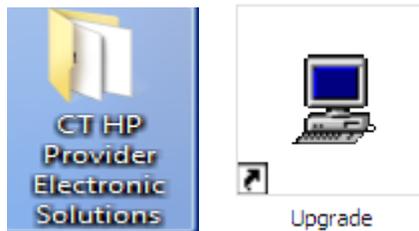


Apply Upgrade

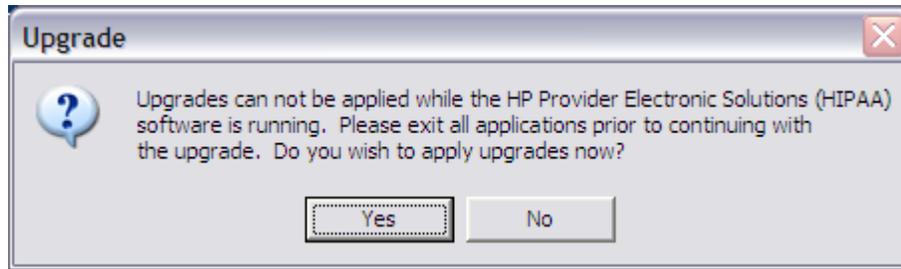
- Step 1** Close PES (if it is currently running)
- Step 2** Select the **Start** button in the lower left of your desktop, and then select **All Programs**, **CT HP Provider Electronic Solutions**, **Upgrade**.



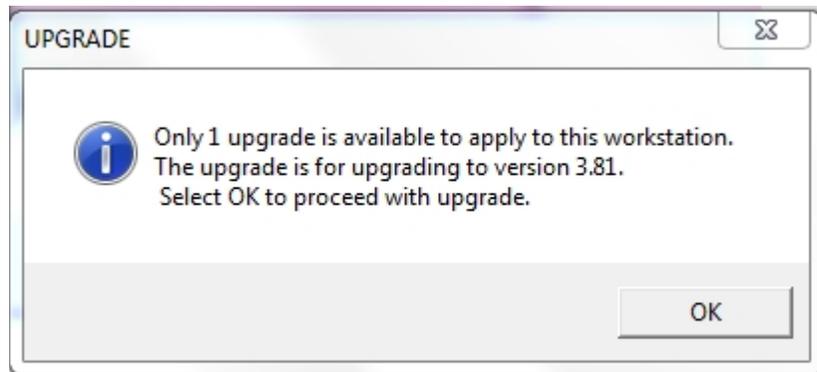
Or you can double-click the **CT HP Provider Electronic Solutions** folder on your desktop to locate the **Upgrade** option/icon. Double-click the **Upgrade** icon.



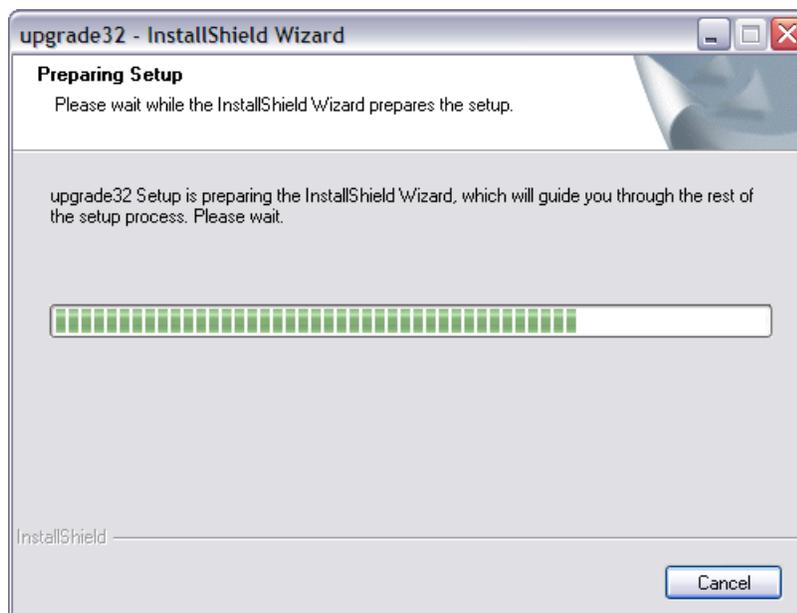
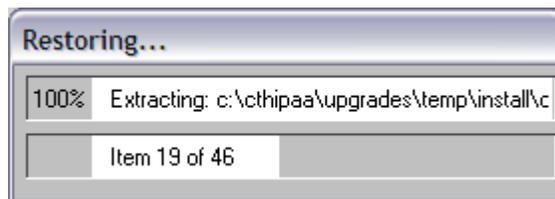
- Step 3** You will be prompted to exit all applications prior to continuing with the upgrade. Click **Yes** to proceed.



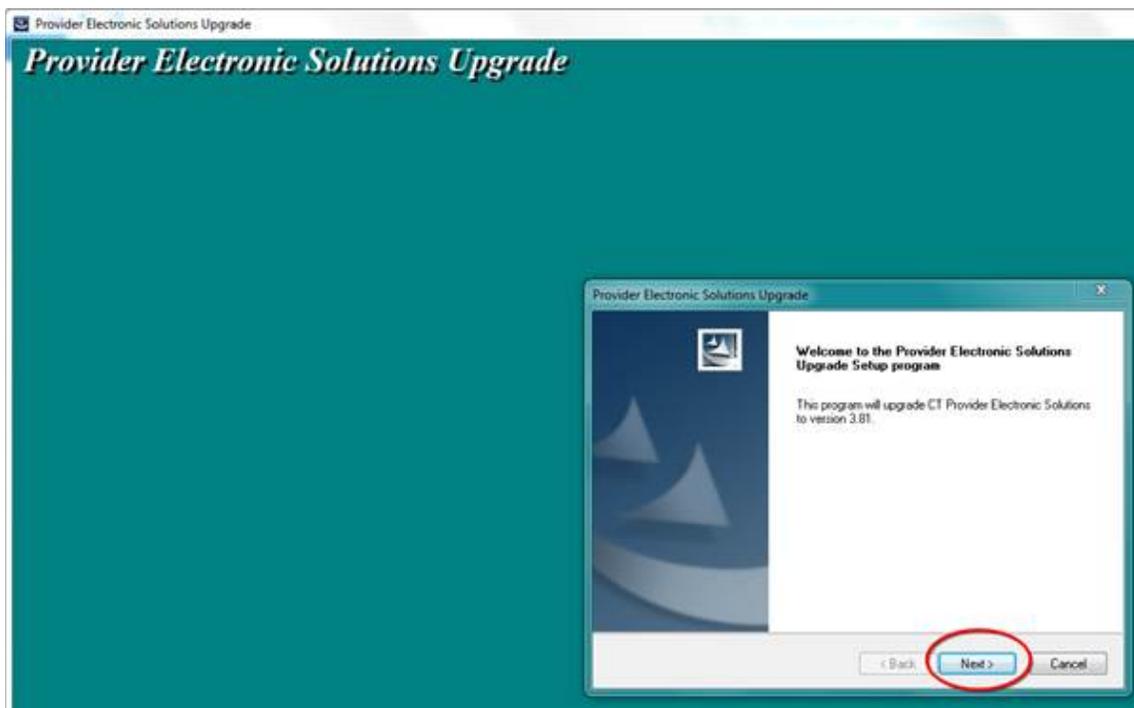
Step 4 A message displays asking you to OK proceeding with the upgrade to PES 3.81. Click **OK**.



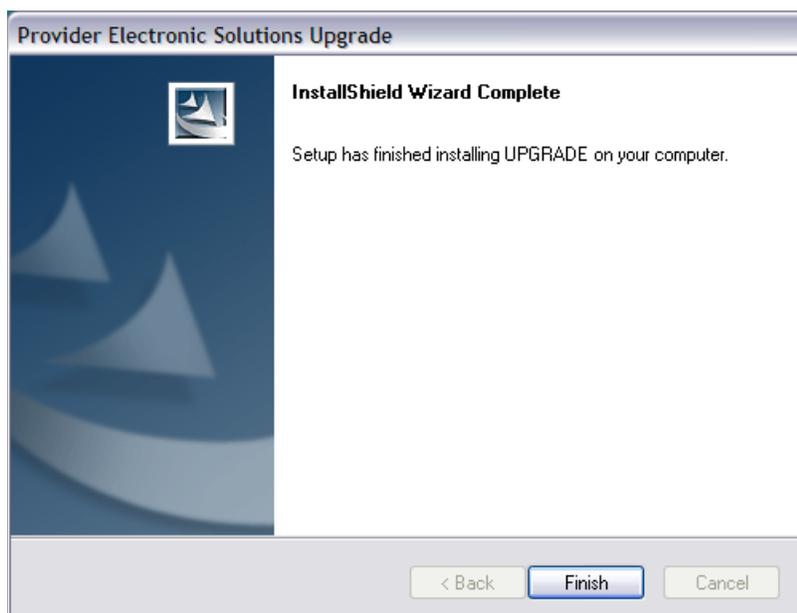
Step 5 **Step 5** The *Upgrade* application will extract the necessary temporary files and prepare to perform the upgrade.



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.



Step 7 An invalid NPI stored in the Billing or Other list and submitted on a claim using the new 5010 version of PES will cause the entire batch of claims to reject. It is important to update any invalid NPI's before submitting claims using this new version. **IMPORTANT:** **When either the Billing or Other provider list has been updated, claims that are**

copied or resubmitted will not inherit this correct provider data unless the provider ID is re-selected from the provider ID list. *Failure to re-select this provider ID on each affected claim prior to the submission of a batch will cause the entire 837 batch to reject.*

The screenshot shows a software window titled "HP Provider Electronic Solutions (HIPAA)". The window contains a menu bar (File, Edit, View, Forms, Tools, Window, Help) and a toolbar with various icons. The main area displays a form for "837 Institutional Nursing Home". At the top, there are summary fields: "Total Charge .00", "OI Amount .00", "Billed Amount .00", and "Services 1". Below this are tabs for "Header 1", "Header 2", "Header 3", "Header 4", "Header 5", and "Service". The "Admission" section includes fields for "Date" (01/01/2014), "Hour" (00), and "Type" (1). The "From DOS" is 01/01/2014 and "To DOS" is 01/30/2014. The "Attending" section has a "Provider ID" field containing "1121234444" (highlighted with a red box) and a "Last/Org Name" field containing "TEST". The "Referring" section has "Provider ID" and "Last/Org Name" fields. On the right side, there is a vertical toolbar with buttons: Add, Copy, Delete, Undo All, Save, Edit All, Find..., Print, and Close. At the bottom, there is a table header with columns: Client ID, Last Name, First Name, Billed Amount, Last Submit Dt, and Status.