

Provider Electronic Solutions Upgrade Instructions

Get Upgrades from the Web

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

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.

***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.*

WARNING:

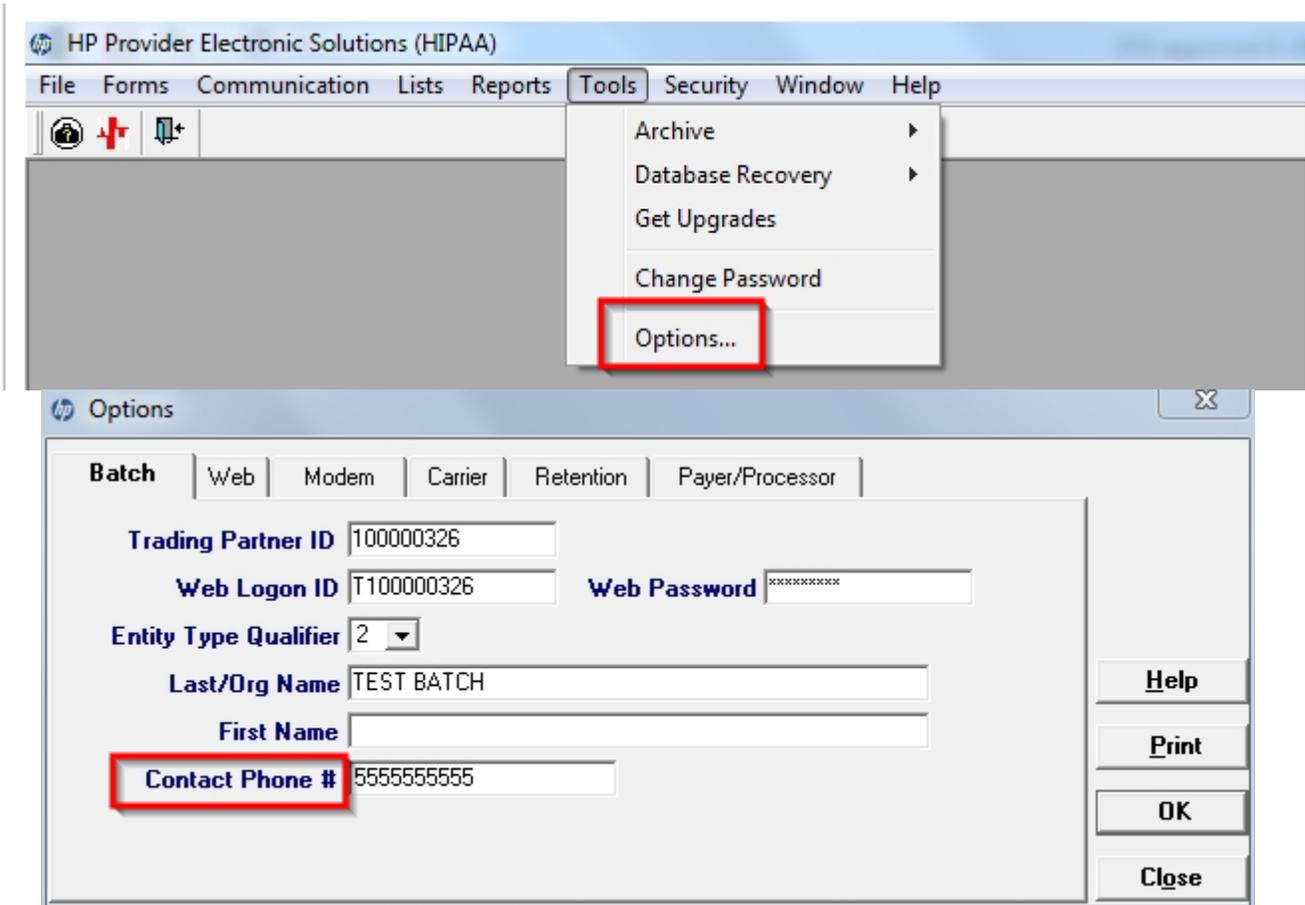
Please note: A **FULL** installation should **ONLY** be used if you have **NEVER** used PES before. If a full installation is downloaded to a PC that has an existing PES database installed, the entire database will be lost (overwritten with a BLANK database.) To preserve your existing database you must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

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

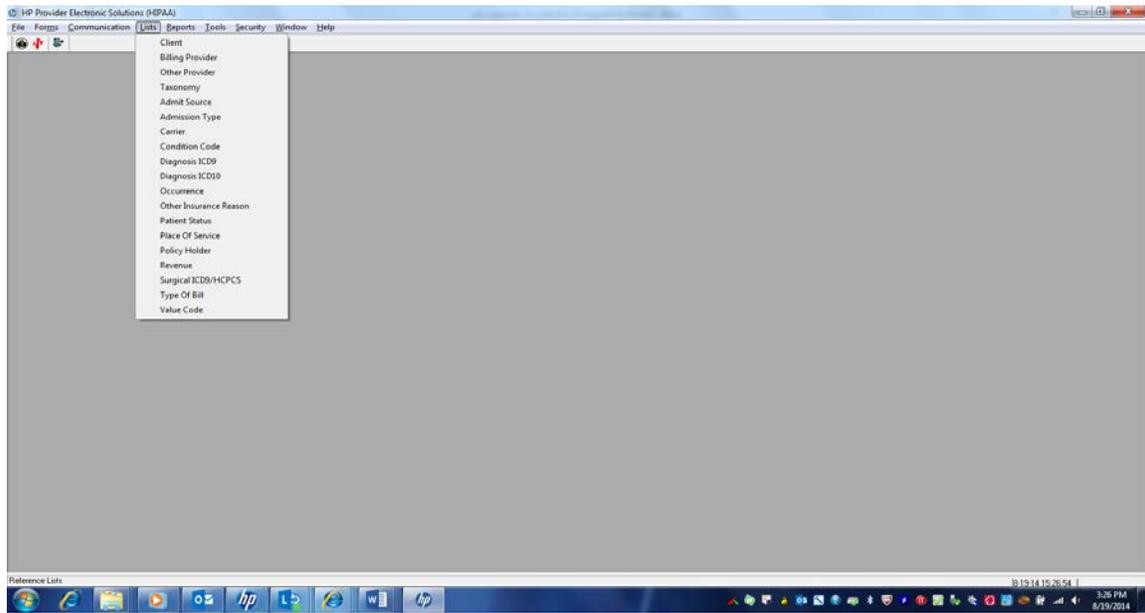
If you are running a version less than 3.80, **stop!** You **MUST** upgrade one version at a time, in version order, until you are at version 3.80 before upgrading to 3.81. If you are running version 3.74, for example, then you must upgrade to version 3.75, 3.76, 3.77, 3.78, 3.79, 3.80, then 3.81. **Skipping upgrades will cause your application of PES to miss critical data, and could possibly cause your database to become corrupted.**

Please Note: In order to ensure that transactions sent through PES 3.81 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.



- 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).



HP Provider Electronic Solutions (HIPAA)

File Edit View Forms Lists Tools Window Help

HP Billing Provider

Provider ID 2103211231
 Taxonomy Code 213400000X
 Last/Org Name TEST PROVIDER
 SSN / Tax ID 123456789
 Provider Address
 Line 1 111 TEST AVE
 City HARTFORD
 Line 2
 State CT
 Zip 12345-6761

Provider ID Code Qualifier XX
 Entity Type Qualifier 2
 First Name
 SSN / Tax ID Qualifier 24

Add
 Delete
 Undo All
 Save
 Find...
 Print...
 Close

Provider ID	Taxonomy	Last/Org Name	Type Qualifier
2103211231	213400000X	TEST PROVIDER	2

- 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. It is the *Upgrades* folder of this installation where the upgrade file will need to be located.

Step 2 Follow the steps for *Upgrade for Stand Alone Computer* (Steps 1 through 5) 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 via the Web

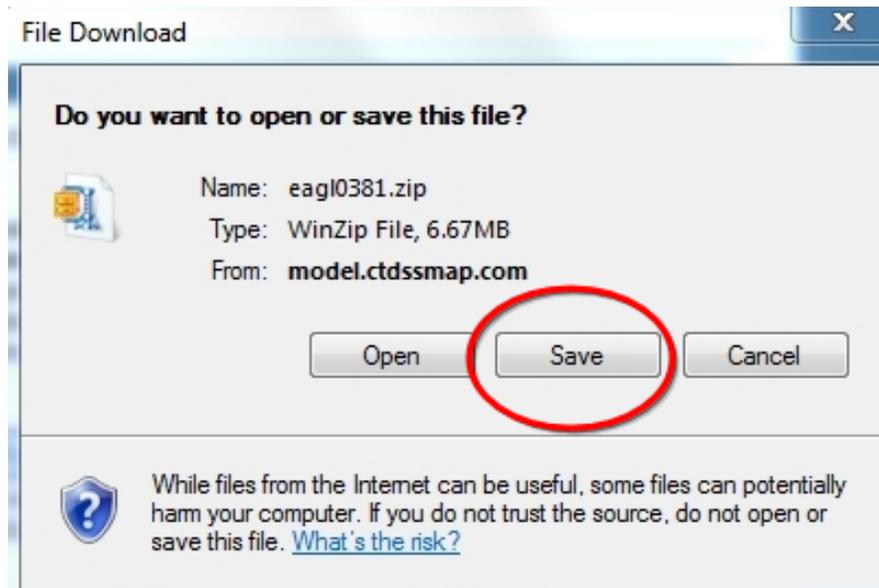
Beginning the Upgrade

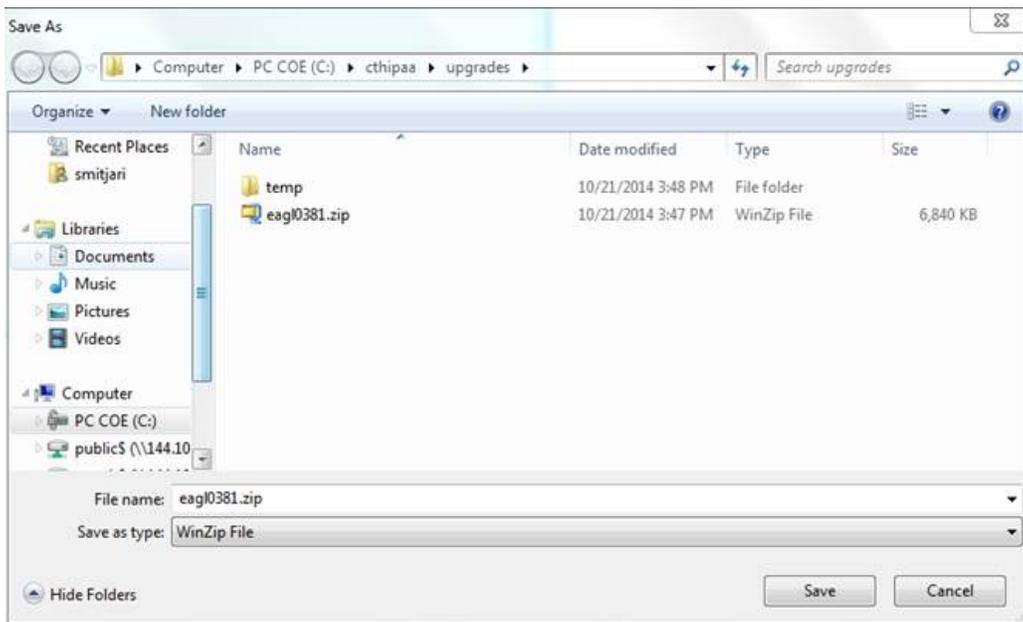
Use these instructions to begin a standalone computer upgrade.

Important: Before applying the upgrade, verify that the PES software is closed.

Step 1 From the EDI Software window click on Provider Electronic Solutions 3.81 Upgrade. Providers should call EDI Support for assistance if they have any questions or need assistance with any prior software versions.

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

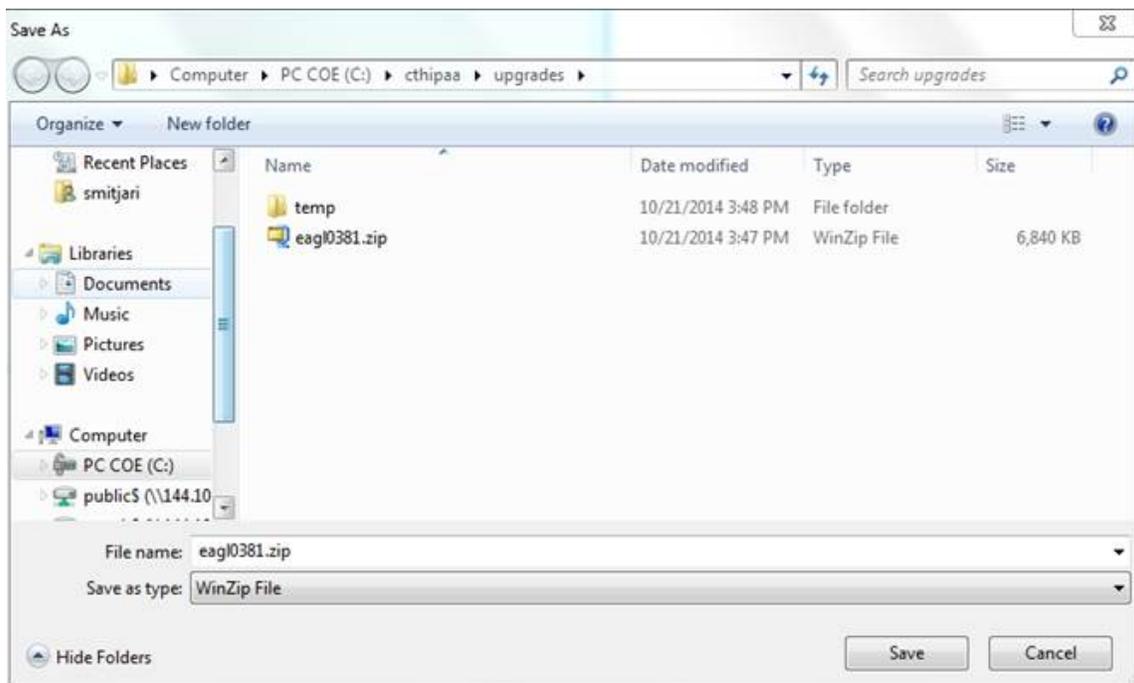




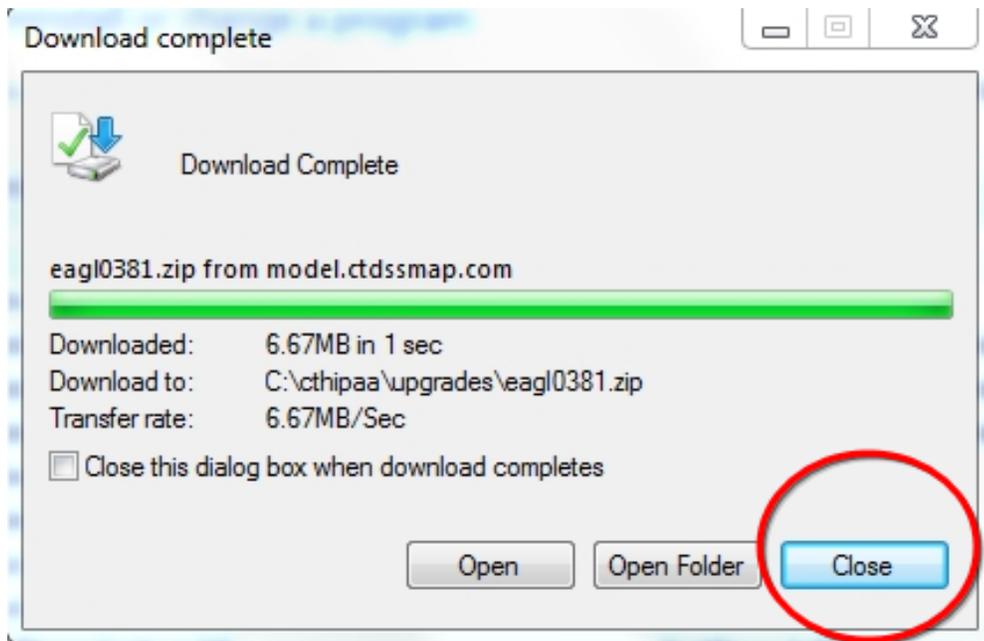
Step 3 System will prompt you to select a “save” location for the upgrade file.

Step 4 Navigate to the “cthipaa\upgrades” folder on your computer hard drive (default location: c:\cthipaa\upgrades) and click **Save**.

You must verify that the “Save As” window looks like the example shown. Saving the file in the proper directory will ensure a successful upgrade.

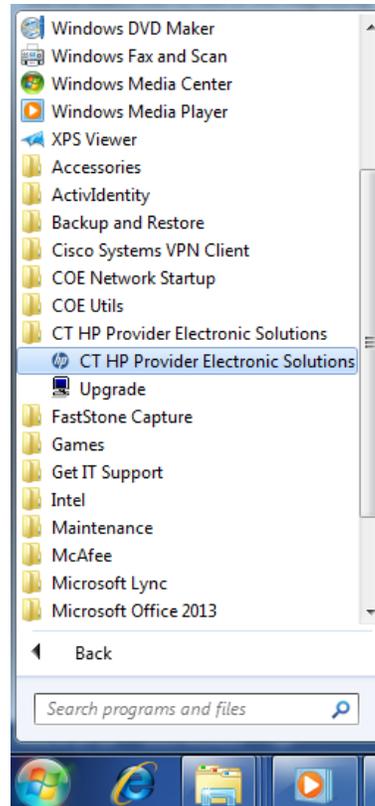


Step 5 The file will be downloaded and saved to your computer. Once the process is completed close the window. Proceed to **Apply Upgrade**.



Apply Upgrade

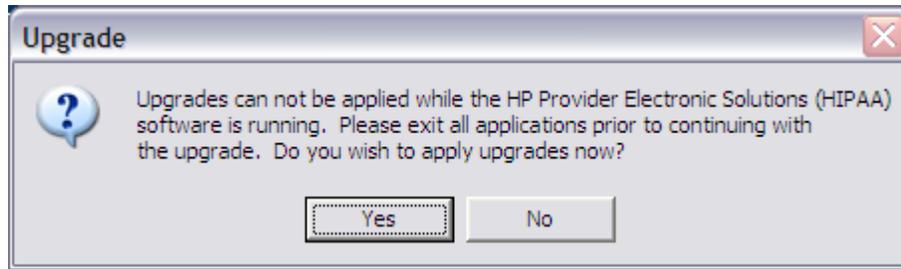
- Step 1** Close PES (if it is currently running)
- Step 2** Select the **Start** button in the lower left of your desktop, and then select **All Programs, CT HP Provider Electronic Solutions, Upgrade**.



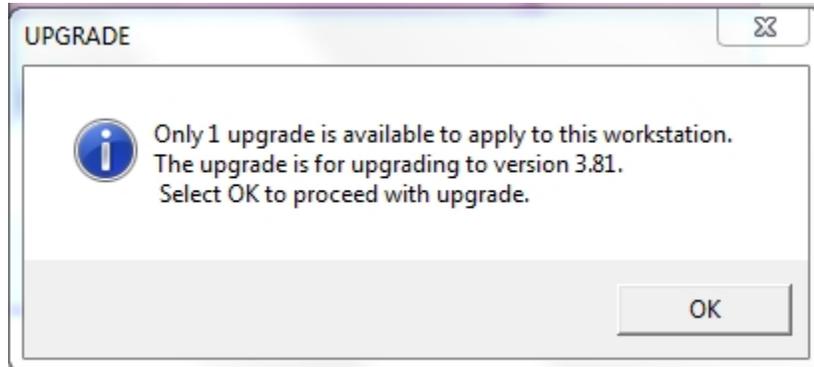
Or you can double-click the **CT HP Provider Electronic Solutions** folder on your desktop to locate the **Upgrade** option/icon. Double-click the **Upgrade** icon.



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

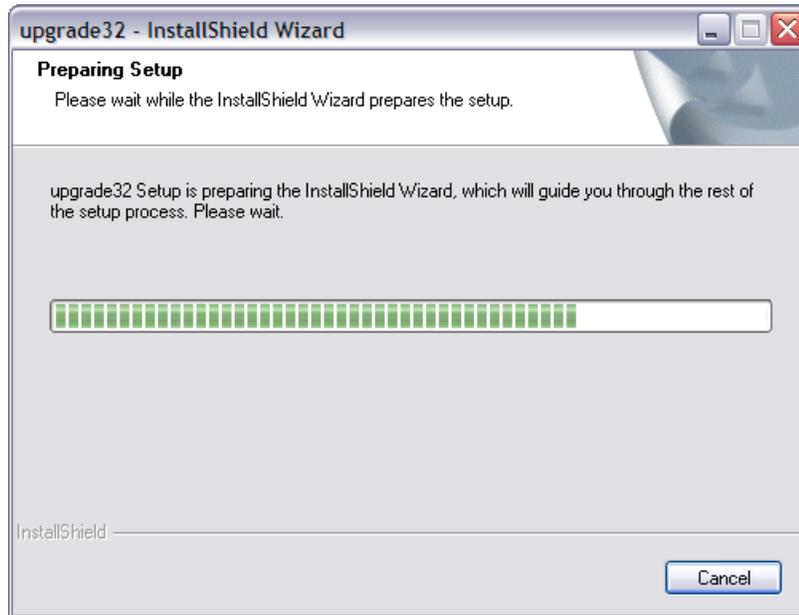
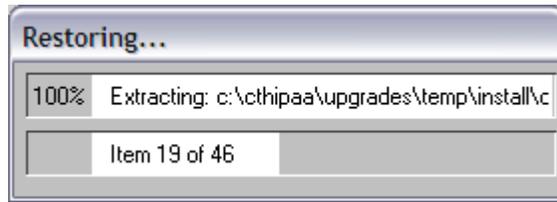


Step 4 A message displays asking you to OK proceeding with the upgrade to PES 3.81. Click **OK**.



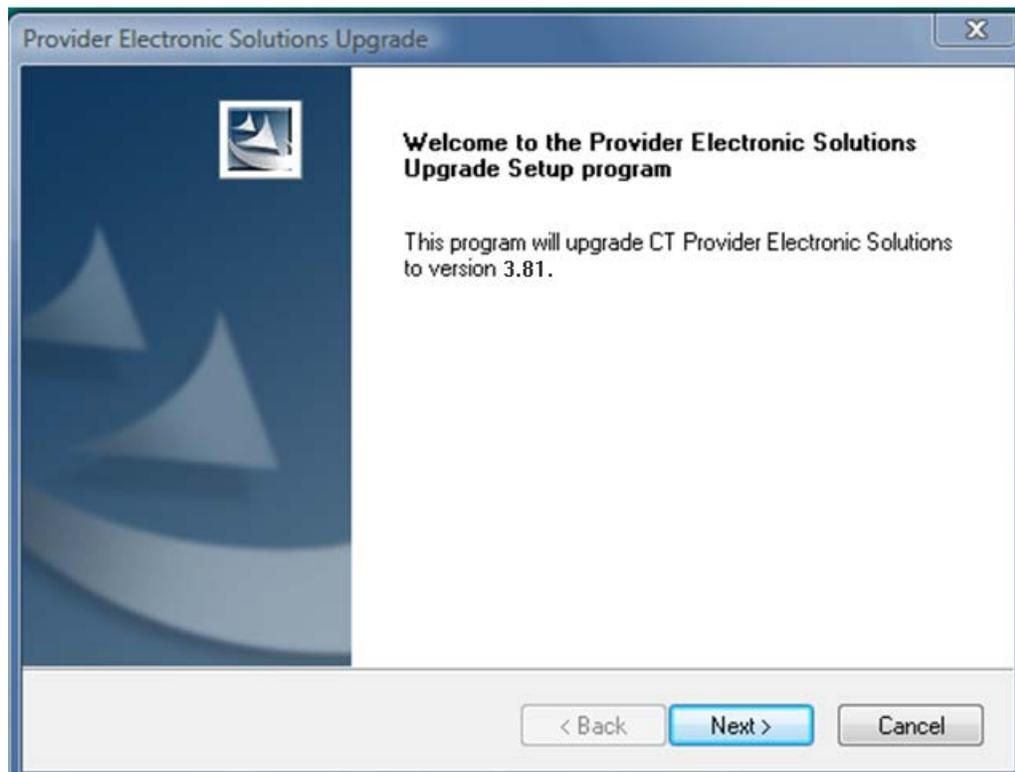
Step 5

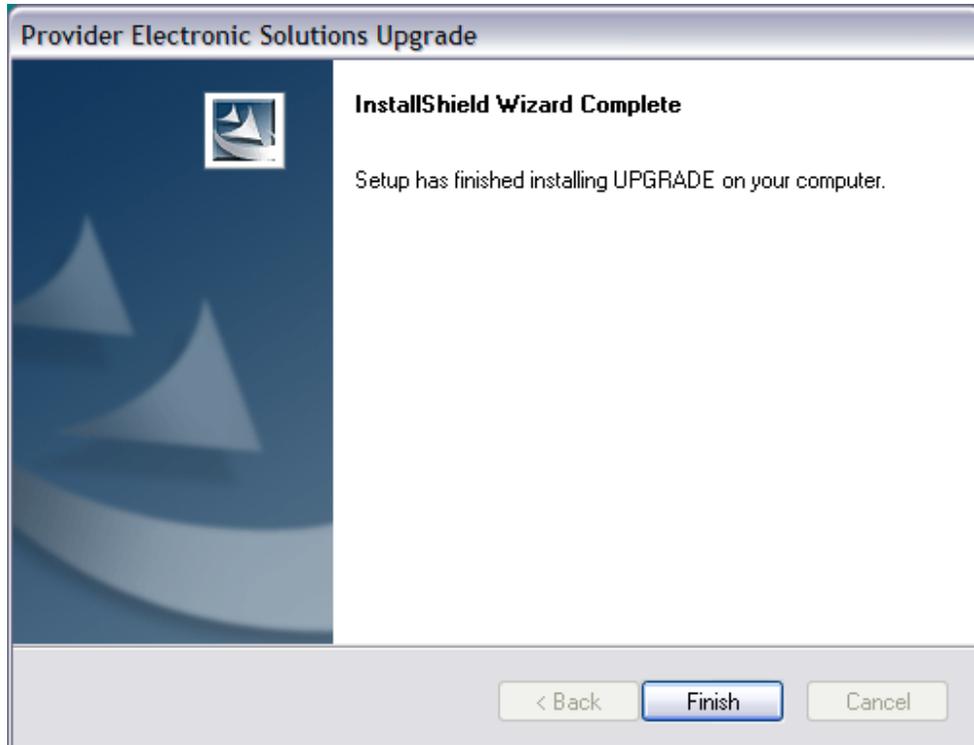
The *Upgrade* application will extract the necessary temporary files and prepare to perform the upgrade.



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.**

837 Institutional Nursing Home

Total Charge 824.24 OI Amount .00 Billed Amount 824.24 Services 1

Header 1 Header 2 Header 3 Header 4 Header 5 Service

Admission
 Date 06/15/2012 Hour [v] Type 3

From DOS 07/28/2014 To DOS 07/31/2014

Attending
 Provider ID 001265172
 Last/Org Name ROBBINS

Referring
 Provider ID [v]
 Last/Org Name [v]

Add
 Copy
 Delete
 Undo All
 Save
 Edit All
 Find...
 Print
 Close

Client ID	Last Name	First Name	Billed Amount	Last Submit Dt	Status
123456789	DOE	JANE	824.24		R
123456789	DOE	JANE	824.24		R
123456789	DOE	JANE	824.24		R
123456789	DOE	JANE	824.24		R