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, <u>the entire database will be lost</u> (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.

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- On the *Main Menu* click **Lists** and then **Billing Provider**. For each listed provider you must verify that:
 - o 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.
 - o 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).

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• 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**.

File Download	×
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While files from the Internet can be useful, some files of harm your computer. If you do not trust the source, do save this file. What's the risk?	

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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.

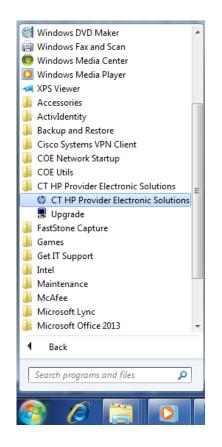
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Step 5 The file will be downloaded and saved to your computer. Once the process is completed close the window. Proceed to Apply Upgrade.

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Apply Upgrade

- Close PES (if it is currently running) Step 1
- 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.

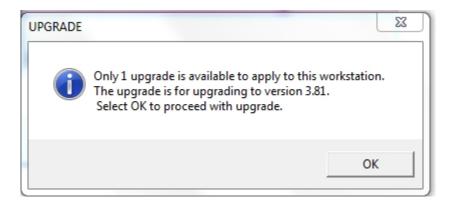


Electronic Solutions

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**.

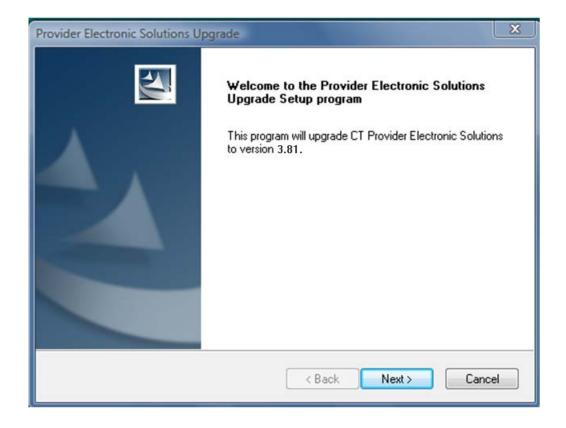


Step 5 The *Upgrade* application will extract the necessary temporary files and prepare to perform the upgrade.

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upgrade32 - InstallShield Wizard
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upgrade32 Setup is preparing the InstallShield Wizard, which will guide you through the rest of the setup process. Please wait.
InstallShieldCancel

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



Provider Electronic Solution	Provider Electronic Solutions Upgrade					
	InstallShield Wizard Complete Setup has finished installing UPGRADE on your computer.					
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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.*

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