

# PC-ACE Quick Reference Guide for Part A Providers



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# Section 1 - Getting Started Using PC-ACE

This guide is to be used to assist in setting up PC-ACE for Medicare A/B claim submission to NGS.

#### Minimum System Requirements

- SVGA monitor resolution (800 x 600)
- Windows 8, Windows 7, Vista
- Adobe Acrobat Reader Version 4.0 or later (for overlaid claim printing)

**Note:** When the Windows "Large Fonts" display setting is enabled, the screen resolution must be 1024 x 768 or higher. The Institutional Claim Form and Professional Claim Form will not display properly at lower screen resolutions.

#### PC-ACE Part A Full Install Instructions

Steps 1–7 only need completing if you initiate the install from the NGS website home page.

- 1. Open an Internet browser and go to https://www.NGSMedicare.com.
- 2. Select **Accept** when presented with the Attestation page.
- 3. Select your line of business and state.
- 4. Select Resources at the top of the home page.
- 5. Select EDI Solutions , EDI Software PC-ACE, Download PC-ACE.
- 6. On the **PC-ACE Download** form, complete all required fields marked with an asterisk (\*).
- 7. Under Select Your Download Below, select the radio button option for PC-ACE Full Installation (Institutional and Professional) PC-ACE users – Version XX
- 8. Select the **Submit Request** button.
  - Please note the installation password NGSMAC1 at the top of the page.
- 9. Once you have noted the installation password, select the **Download** button to start the download.
- 10. A message will appear: 'Do you want to open or save this file?' Select Save.
  - Note: These instructions are designed for use with Microsoft's Edge and Chrome browsers. The use of other browsers is not supported by the NGS EDI Help Desk.
- 11. On the left side of the 'Save In' dialogue box, select the **Desktop** button to save the file to your desktop, then select **Save**.
  - Note: If you are using Windows 7 or 8, the buttons on the left may not be present. If this is the case please select **Desktop** from the **Save in:** dropdown box even when using MSIE.
  - Note: NGS does not support the installation of PC-ACE on a network. The file will begin to download to your desktop.
- 12. A message will appear: **'Download complete'**—close the download dialogue box and **minimize** your Internet browser in preparation for step 17.

- 13. Launch the **setup.zip icon**; your unzip wizard should open.
  - Note: Since unzip utilities vary, you are responsible for getting this file unzipped to your desktop. Please follow the instructions for your unzip utility.
- 14. Double Click **setup.exe** icon on your desktop, which will open the file.
- 15. The Wise Installation Wizard will begin.
- 16. Installation code is NGSMAC1.
- 17. At the Welcome window, select **Next**.
- 18. At the Drive Selection window, select **Next**.
- 19. At the Start Installation window, select **Next.**
- 20. Follow the online instructions until **Finish** is selected.
- 21. To access PC-ACE, select the **PCACE icon** and enter the default user ID **SYSADMIN** and the password **SYSADMIN**.
- 22. We recommend downloading additional material to assist you with PC-ACE. After the software successfully downloads, revisit the EDI Solutions webpage for available documentation.

#### PC-ACE Part A Upgrade Instructions

**Please Note:** Prior to performing this upgrade it is recommended that a backup of your current version of PC-ACE is performed. If the version of PC-ACE currently installed is more than two versions behind the available version with NGS, please upgrade as soon as possible.

Steps 1–7 only need completing if you initiate your upgrade from the NGS website home page.

- 1. Make sure the PC-ACE program is closed prior to doing this upgrade.
- 2. Open an Internet browser and go to https://www.NGSMedicare.com.
- 3. Select Accept when presented with the Attestation page.
- 4. On the NGS home page, select your line of business and state.
- 5. Select Resources dropdown at the top of the home page.
- 6. Select EDI Solutions.
- 7. Select the EDI Software Dropdown to download the software.
- 8. Select Download PC-ACE.
- 9. On the **PC-ACE Download** form, complete all required fields marked with an asterisk (\*).
- 10. Under Select Your Download Below, select the radio button option for PC-ACE Upgrade (Institutional and Professional) PC-ACE users Version XXXX.
- 11. Select the **Submit Request** button.
- 12. Please note the installation password NGSMAC1 at the top of the web page.
- 13. Once you have noted the installation password, select the **Download** button to start the download.
- 14. A message will appear: **'Do you want to open or save this file?'** Select **Save**. **Note:** These instructions are designed for use with Microsoft's EDGE and CHROME browser. The use of other browsers is not supported by the NGS EDI Help Desk.
- 15. On the left side of the **Save In** dialogue box, select the **Desktop** button to save the file to your desktop, then select **Save**.
  - These instructions are designed for use with Microsoft's EDGE and CHROME browser. The use of other browsers is not supported by the NGS EDI Help Desk.

- On the left side of the **Save In** dialogue box, select the **Desktop** button to save the file to your desktop, then select **Save**.
- If you are using Windows 7 or 8, the buttons on the left may not be present. If this is the case please select **Desktop** from the **Save in:** dropdown box even when using MSIE.
- We **do not** support the installation of PC-ACE on a network.
- 16. A message will appear: 'Download complete'—close the download dialogue box and minimize your Internet browser in preparation for step 17.
- 17. Launch the **pcaceup.zip**; your unzip wizard should open. **Note:** Since unzip utilities vary, you are responsible for getting this file unzipped to your desktop. Please follow the instructions for your unzip utility.
- 18. Double click on the p**caceup.exe** icon on your desktop.
- 19. The Wise Installation Wizard will begin.
- 20. Installation code is NGSMAC1 (not case sensitive) and select OK.
- 21. A message will appear asking if a system backup has been performed.
  - a. If the answer is yes, select **Yes** to proceed with the update.
  - b. If the answer is **No**, make a backup as follows:
    - i. Select the **No** button, and then click the **OK** button in the **Update Cancellation Notice** window; the installation wizard will close.
    - ii. Launch PC-ACE and, on the main toolbar, select the **System Utilities** button. (last button on the right)
    - iii. On the **Backup/Restore** tab, select the **Backup** sub tab.
    - iv. If there is a path to your normal backup folder in the Destination Drive or Folder field, select the **Start Backup** button and proceed as you normally do for a backup, close PC- ACE and return to step 20.
    - v. If the Destination Drive or Folder field is empty, select the small button to the right of that field (had 3 dots on it), browse to the folder you wish to save your back up to and select the **Open** button, then select the **Start Backup** button.
    - vi. In the **Confirm** window, select the **OK** button; wait while the backup completes.
    - vii. After the backup completes, an **Information** window will appear stating that your backup has completed successfully; select the **OK** button.
    - viii. Close PC-ACE and return to step 20.
- 22. Follow the online instructions until **Finish** is selected.
- 23. The PC-ACE Backup Reminder dialogue box will appear advising that the update was completed successfully. It will also recommend that you make a new backup now that it has been upgraded to version X.XX (you should perform this backup after you have confirmed that you can open a claim and/or a patient file without receiving an error message); select OK.
- 24. To access PC-ACE, select the **PCACE icon** and the **enter the default user ID SYSADMIN** and the password **SYSADMIN**.
- 25. We recommend downloading additional material to assist you with PC-ACE. After the software successfully downloads, revisit the EDI Software web page for available documentation.

#### Logging Into PC-ACE for the First Time

1. Upon installation of the PC-ACE software, from the Desktop click on the **PC-ACE** icon to open the software (Figure 1).



2. Upon selecting an ICON (for example INST) the Sign On box appears. Enter "SYSADMIN" in the User ID and Password fields and select OK (Figure 2).

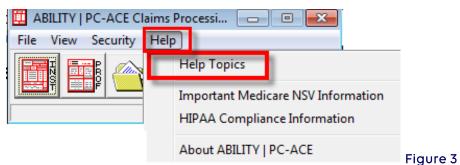
Sign On		
User ID:	SYSADMIN	
Password:	*****	
<b>(</b>	OK Cancel	Figure

**Note:** NGS is unable to change, modify or reset any individual passwords once they have been setup in your PC-ACE software.

#### Online Help Feature

The PC-ACE program has an online help feature that can be accessed from the **PC-ACE Claims Processing System** main menu.

1. Select Help, and then select Help Topics (Figure 3).



- 2. Select the **Index** tab (Figure 4).
  - a. To search for a particular subject, type a few letters of the word.
  - b. Select the index entry to be reviewed, and select **Display**. That portion of the topic will appear. Review or Print the information.

😵 ABILI	ITY   PC-A	CE™ Cla	ims Proce	ssing Syste	2
∰≣ Hide	⟨⊐ Back	<b>Print</b>	Detions		
Contents		Search	1		T
	the keywor		1		
archivin	ig claims				
		review a	nd maintena	ance 🔺	
archivin	n <mark>g claims</mark> ng transmis nents - prin				
audit tra		-			
building		270 eligib	ility benefit ı		
building	) the ANSI- ) the electro s Master Fi	onic claim		lest	
Claim &	Reference	e File Edit		aint	
Claim A	rchive Fea tachments	ture			
Claim F	orm (Institu orm (Profes	ssional)			
claim in	port in PC port prefer	ences			
Claim Li	ist Form co ist Form Fe		n		
	ayments ayments:po	osting to Ir	nstitutional c	ain 🔻	
				lay	
					Figure

## Section 2 - Reference File Maintenance

**Reference File Maintenance** records must be completed in order to begin utilizing the PC-ACE Software.

1. Select the **Reference File Maintenance** folder (yellow folder) (Figure 5).



#### Patient Setup

The **Patient** tab allows the addition and maintenance of patient information, including the patient's primary and secondary insured details.

- The setup of the Patient's information is **optional**. The patient information will not be accessible during claim entry or claim import if the patient database is not set up.
- The **complete patient list** will be accessible during **claim entry** using the variable-list lookup feature if the patient record is set up. When a patient is selected from the lookup list during claim entry, all applicable patient information will **auto populate** to the **appropriate claim form fields**.
- Once the patients are added, the Patient tab provides a convenient **Sort By** selection that quickly sorts the patient list by **Patient PCN** or **Patient Name** under the List Filter Options (Figure 6). (Use the F1 function key for more information).

👖 Reference File Ma	aintenance						
File View Reports							
Patient Payer Pro-	vider (Inst) 🏾 Provider (Prof	Codes/Misc					
PCN	Last Name	First Name	MI	DOB	LOB	<u> </u>	
D0EJN99000000A	DOE	JOHN	L	03/17/1956	MCA/		
						-	
Sort By:      Patien	t PCN C Patient Name						
List Filter Options							
<ul> <li>Show all patien</li> </ul>	ts (no filter applied)						
C Filter list to inclu	ide Patient PCNs starting v	vith					
C Filter list to inclu	de Patient Names starting	with	-				
		,					
<u>N</u> ew ⊻	iew/Update <u>D</u> eleti	e <u>P</u> lan of Car	e			Close	
							Figure 6

- A number of fields on the Patient/Insured Information tabs support data entry via **fixed-list** or **variable-list lookups**. These **lookup lists** are accessed by **right-clicking** the mouse in the field or pressing the **F2** key in the field.
- Helpful **fly-over** hints are also available for many fields by **left-clicking** in a field or **hover the mouse** over the field.
- 1. To add a new patient record, click the **New** button (Figure 7).

🇰 Refe	rence File Mai	ntenance					_	
File Vie	w Reports							
Patient	Payer Provi	der (Inst) 🗍 Provider (Prof) 🗍	Codes/Misc					
PCN		Last Name	First Name	MI	DOB	LOB		
SMITH	IJN99000000A	SMITH	JOHN	L	03/17/1956	СОМ/		
I								-
<u>S</u> ort B	y: 💿 Patient I	PCN C Patient Name						
⊢ List F	Filter Options							
•	Show all patients	(no filter applied)						
OF	ilter list to includ	e Patient PCNs starting with						
		e Patient Names starting wit						
		er ellert reliev otarting mi	. 1					
	lew <u>V</u> ie	w/Update <u>D</u> elete	Plan of Care				<u>C</u> lose	

- 2. Enter the Patient Information on the following tabs (Figure 8):
  - **General Information** general patient information such as the patient's name, address, birthdate, and various status flags.
  - **Extended Info** extended patient information such as information on the patient's primary Provider ID.
  - **Primary Insured** payer, insured, and employer information for the primary Institutional payer(s).
  - **Secondary Insured** insured information for the secondary institutional payer(s).
  - Tertiary Insured insured information for the tertiary institutional payer(s).

ast Name First Name		rof) Secondary Insured	
Patient Address Address City City State Zip Country Phone Notes	Patient Status Active Patient Y Sex DDB/ Marital Status Employment Status Student Status CBSA Code	Discharge Status	

3. After completing data entry on the Patient Information form, click the <u>Save</u> button to save and exit the form (Figure 9).

Patient Information		X	1
General Information Extended Info Primary Insure	d (Inst) 🖡 Primary Insured (Pr	of) 🛛 Secondary Insured 🛛 💶 🕨	ļ
Last Name First Name SMITH JOHN		ntrol No (PCN) 99000000A	
Patient Address Address I HOSPITAL DRIVE City State Zip JEFFERSON VALLEY NY 10535 Country Phone	Patient Status Active Patient Y Sex M DOB 03/17/1956 Manital Status Employment Status Student Status	Discharge Status	
Notes	CBSA Code		Figure 9
		Save Cancel	

4. During the patient save operation, an edit validation process is performed on all patient record fields. If no edit validation errors occur, no further correction is needed and the patient record will be saved.

When edit validation errors occur, double-click the first error message to jump to the corresponding field. Several **Save** attempts may be required when there are multiple errors to correct and save a "clean" patient record (Figure 10).

Patient Information		×
General Information Extended Info Primary Ins	ured (Inst) Primary Insured (Prof)	Secondary Insured
Last Name First Name SMITH JOHN	MI Gen Patient Control	
Patient Address Address 1 HOSPITAL DRIVE		ischarge Status
City         Edit Validation Errors List           UEFFER         Patient Sex Code Is Req           Country	uired	
Double-click error to jump to X Indicates that error must I		<u>Close</u> <u>C</u> ancel

#### Payer Setup

The payer information for Medicare is already present in the PC-ACE software by default. Add **additional** Payer records for **other** lines of business to include these payers on newly entered claims.

- 1. To set up additional Payers, select the **Payer** tab. (Figure 11).
- 2. Select **New** to open the payer information screen.

		ntenance					$\times$
le View	Reports						
Patient Paye	er Provi	ler (Inst)   Provider (Prof)   Codes/Misc					
Payer ID	LOB	Description	State	Usage			^
01041	СОМ	HEALTHSOURCE	FL				
06001	MCA	MEDICARE PART A - WI & HHH-A		Inst Only			
06014	MCA	MEDICARE HHH-A - CA		Inst Only			
06101	MCA	MEDICARE PART A - IL		Inst Only			
06102	MCB	MEDICARE PART B - IL		Prof Only			
06201	MCA	MEDICARE PART A - MN		Inst Only			
	1						$\mathbf{v}$
<u>S</u> ort By: 🕡	Payer ID	C Payer Description C Payer LOB C Paye	r State				
<u>S</u> ort By: (● □ List Filter Oj		C Payer Description C Payer LOB C Paye	r State			 	
List Filter O	otions	C Payer Description C Payer LOB C Payer no filter applied)	r State			 	
List Filter O	otions II payers (i		r State			 	
List Filter 0	otions Il payers (i t to includ	no filter applied)			Apply	 	
List Filter 0	otions Il payers (i t to includ	no filter applied) B Payer IDs starting with					
List Filter 0	otions III payers ( t to includ t to includ	no filter applied) B Payer IDs starting with			Apply	<u>C</u> lose	

3. Enter the new payer's information taking advantage of the built-in lookups where possible by pressing the **F2** key or right-clicking the mouse in the fields highlighted below (Figure 12).

11

Payer Information		×
Payer ID LOB Receiver ID	ISA08 Override	
Full Description		
Address & Contact Information Address	Flags Source	1
City State Zip	Usage	
Contact Name		
Phone         Ext         Fax           [         [         [		Figure 1
PrintLink Matching Descriptions	<u>Save</u> <u>C</u> ancel	

4. The **Payer Information** window will be displayed. Enter all the appropriate information in the highlighted in the following fields.

Use the mouse to click into a field or press the **<Tab>** button to progress through the form. Complete the following information (Figure 13):

ayer ID LOB Recei	ver ID	ISA08 Over	ride	1000	
06111 COM ull Description DXFORD				<b>*</b>	
Address & Contact Information Address City Sta Contact Name Phone Ext	ate Zip	-	Flags Source Media Usage	CI E B	
	Fax				

Payer ID	Enter the Other Payers National Identification number. If unknown, enter a value of choice as this is a required field Examples: 9999BSCB for Blue Cross and Blue Shield 8888AETNA for Aetna 7777MC for Medicaid
LOB	<b>F2</b> or right click in this field and <b>select</b> the <b>LOB</b> for the desired Payer
Full Description	Enter the <b>Company name</b>
Source	F2 or right click in this field and select the corresponding Payer source

- 5. All other fields should remain blank and select Save.
- 6. Repeat the relevant steps to create additional Payer records as needed.
- 7. Click **Close** when finished (Figure 14).

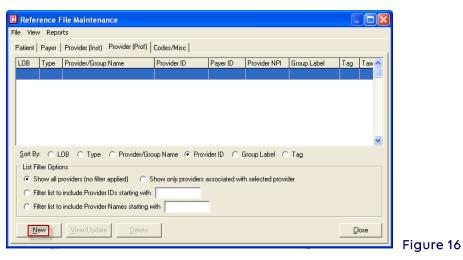
19003     MCB     DME MACJURISDICTION D     Prof Only       5555GAP     GAP     MEDIGAP     Prof Only       6666AARP     COM     AARP     Inst Only       8888AETNA     COM     COMMERICAL     Inst Only       9393BCBS     BC     BLUE CROSS AND BLUE SHIELD     Inst Only		je 🛛	State	Description	LOB	Payer ID
S6666AARP       COM       AARP       Inst Only         7777MC       MCD       COBCOMMERCIAL       Inst Only         8888AETNA       COM       COMMERICAL       Inst Only         93939BCBS       BC       BLUE CROSS AND BLUE SHIELD       Inst Only         Soft By:       © Payer ID       © Payer Description       © Payer LOB       © Payer State		Inly		ME MAC JURISDICTION D	MCB	19003
7777MC       MCD       COBCOMMERCIAL       Inst Only         3888AETNA       COM       COMMERICAL       Inst Only         39398CBS       BC       BLUE CROSS AND BLUE SHIELD       Inst Only         Soft By:       © Payer Description       C Payer LOB       C Payer State		Inly		1EDIGAP	GAP	5555GAP
3888AETNA COM COMMERICAL 3999BCBS BC BLUE CROSS AND BLUE SHIELD Inst Only Soft By: © Payer ID C Payer Description C Payer LOB C Payer State				ARP	COM	6666AARP
39398CBS BC BLUE CROSS AND BLUE SHIELD Inst Only		inly		OBCOMMERCIAL	MCD	7777MC
Sort By: © Payer ID C Payer Description C Payer LOB C Payer State				OMMERICAL	COM	3888AETNA
Sort By:  Payer ID Payer Description Payer LOB Payer State		inly		LUE CROSS AND BLUE SHIELD	BC	999BCBS
List Filter Options  Show all payers (no filter applied)  Filter list to include Payer IDs starting with	<u> </u>				-	

#### Provider Record Setup for Medicare

1. Select the **Provider (Inst)** tab (Figure 15).

🛄 Reference File Maintenance					
File View Reports					
Patient Payer Provider (Inst) Provider (Prof)	Codes/Misc				
LOB Provider Name	Provider ID	Payer ID	Provider NPI	Tag	Taxonom 📥
Sort By: CLOB C Provider Name C List Filter Options Show all providers (no filter applied) C Filter list to include Provider IDs starting with Filter list to include Provider Names starting	Show only providers as		cted provider		
New View/Update Delete					<u>C</u> lose

2. Select New (Figure 16).



3. Enter the following information on the General Info tab: (Figure 17)

Institutiona	l Provider Information		Đ	3
General Info	Extended Info			
Name	HOSPITAL	NPI	1234567893	
Address	1 MAIN STREET	Tax ID/Type	571234567 E	
		Tax Sub ID		
City/St/Zip	NEW YORK NY 10010-1001	Taxonomy/Type		
Phone	(212) 111-1111 Fax ()	Country	Site	
Contact	MARY	_		
Provider ID/I	No. 1234567893 LOB MCA	-	_	
Payer ID	SEE NOTES Tag	-	Include In Lookups?	
Remarks	Pr	ovider Associations:	Select None	1
	<u> </u>	0B Provider ID Prov	vider Name 🔼	
	$\sim$		~	Figure 17
			<u>Save</u> <u>C</u> ancel	J

Field Name Provider Name Address	<b>Action</b> Enter Provider/Facility name. Enter Provider/Facility address.
City/St/Zip Phone	Enter Provider/Facility city, state, and ZIP code. Enter the billing provider contact phone number. <b>Fax</b> Optional field
Contact	Enter office contact name (preferably the name of the person using PC-ACE).
Provider ID/No.	Enter the Provider/Facility six-digit Medicare Part A provider number.
LOB	Press the <b><f2></f2></b> key or right click to show list, then and select <b>MCA</b> .
Payer ID	Press the <b><f2></f2></b> key or right click to show the list, and then select the appropriate payer ID.
NPI	Enter the Provider/Facility NPI number.
Tax ID/Type	Enter tax identification number and <b>E</b> for tax ID.
Specialty	Press <b><f2></f2></b> key to show list, then select appropriate specialty.
Taxonomy/Type	Select the appropriate taxonomy code for the facility ( <b><f2></f2></b> will display a list of valid taxonomy codes).
Include in	
Lookups	Type in Y

4. Click on the Extended Info Tab. Press **<F2>** or right click in the Provider Accepts Assign field and select A – Assigned (Provider Accepts Medicare Assignment) (Figure 18).

nstitutional Provider Information	
General Info	
Provider ID/No Type	E-Mail Address
Provider Accepts Assign	
Provider SOF	
Provider Name Match	Secondary Provider IDs (ANSI use only)
Force Legacy ID	· · · · · · · · · · · · · · · · · · ·
Requires POA Reporting	ID/Type #1
	ID/Type #2
<ul> <li>Pay-To Provider Information (specify only)</li> </ul>	if different)
Name	NPI
Address	Tax ID/Type
	Provider ID/No.
City/St/Zip	Sec ID/Type #1
Country	Sec ID/Type #2
	Save Cancel

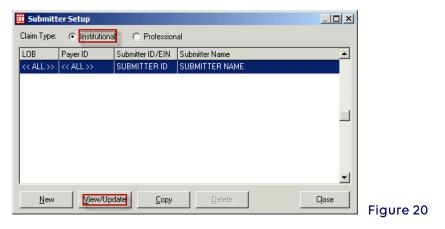
5. Select Save.

#### Submitter Setup

- 1. Select the tab marked Codes/Misc. (Figure 19).
- 2. Select SUBMITTER.

Reference File Maintenanc	e		
<u>file View R</u> eports			
Patient   Payer   Provider (Inst)   Pr	rovider (Prof) Codes/Misc		
Shared	Institutional	Professional	
SUBMITTER	TOB	POS	
DATA COMM	CON/OCC/SP/VAL	CHARGES MASTER	
HCPCS	REVENUE CODE	SPECIALTY	
MODIFIERS			
ICD9			
PHYSICIAN			
FACILITY			
MISC ANSI			
			<u>Close</u>

3. The radio button defaults to Institutional. Select **View/Update** with the submitter record highlighted (Figure 20).



#### General Tab

- 1. Enter submitter number (e.g., NYAXXXX, HMXXXXXX, 0XXX) in the **ID** field (Figure 21).
- 2. Enter name and address of submitter.
- 3. Enter phone number, fax, contact and e-mail address.
- 4. Select <u>Save</u>.

nstitutional Submitter Information
General Prepare ANSI Info ANSI Info (2) ANSI Info (4)
LOB Payer ID
ID SUBMITTER ID EIN
Name SUBMITTER NAME
Address SUBMITTER ADDRESS
City ANYTOWN State NY Zip 10010
Phone (212) 111-1111 Fax (212) 222-2222 Country
Contact CONTACT NAME
E-Mail E-MAIL ADDRESS
<u>Save</u>

#### Referring Physician Setup (Optional)

Referring physician National Provider Identifier (NPI) record should be created for all doctors ordering diagnostic tests and consultations.

1. Select Physician on the Codes/Misc. tab (Figure 22).

🛄 Reference File Maintenan	ce		
<u>File View R</u> eports			
Patient   Payer   Provider (Inst)   F	Provider (Prof) Codes/Misc		
Shared	Institutional	Professional	
SUBMITTER	тов	POS	
DATA COMM	CON/OCC/SP/VAL	CHARGES MASTER	
HCPCS	REVENUE CODE	SPECIALTY	
MODIFIERS			
ICD9			
PHYSICIAN			
FACILITY			
MISC ANSI			
		_	<u>C</u> lose

2. Select New (found on bottom left of screen) (Figure 23).

New	<u>V</u> iew/Update	<u>D</u> elete	<u>C</u> lose	
				Figure 23

- 3. Enter physician's last name, first name, and middle initial (Figure 24).
- 4. Enter physician's NPI number.
- 5. Select <u>Save</u>.

Physician Information	
Physician ID / Type	
Physician's Last Name First Name MI Suffix HOUSE GREGORY ,	
Address	
City     State     Zip     Phone       Image: Im	-
Federal Tax ID / Type     NPI     Taxonomy       1234567893	Figure 24

6. Select <u>Close</u> to exit **Physician Information** box (Figure 25).

New View/Update Delete	<u>Close</u> Figure 25
------------------------	---------------------------

# Section 3 - Claims Entry

Upon completion of the Reference File Maintenance, claims are now ready to be manually entered. When importing claims from another software, the manual entry of claims may be bypassed. Please follow the section on Importing Claims.

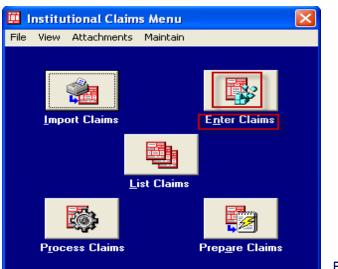
1. Select the **INST** icon from the PC-ACE Claims Processing System main menu (Figure 26).

🔲 ABILITY   PC-ACE Claims Processi 📃 💷 💌	
File View Security Help	
📑 🕋 📚 🐻 👪 🅰	
Copyright 2016 ABILITY Network Inc.	Figure 2

- 2. Enter **SYSADMIN** as both the User ID and Password in the **Sign On** box if it appears (Figure 27).
- 3. Select OK.

Sign On			
User ID:	SYSADMIN	1	
Password:	*****		
	ОК	Cancel	Figure 27

4. Select Enter Claims to open the Institutional Claim Form (Figure 28).





#### **Entering Claim Data**

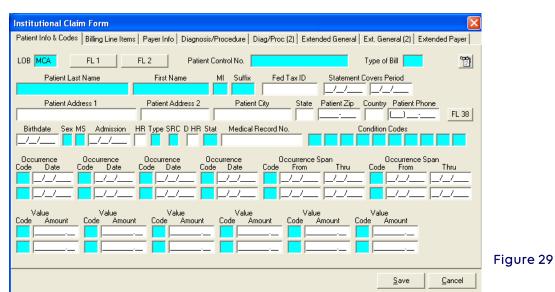
Click on any field to enter data or press the **TAB** key to move from field to field left to right. Use the **UP ARROW** and **DOWN ARROW** keys to move up and down through the claim form fields, respectively.

A number of productivity enhancing features are available during claim entry:

- **Claim Form Topic Help** Press the **<F1>** key while entering an Institutional claim and the software will display the **Institutional Claim Form** topic in PC-ACE.
- **Fixed-List Lookups** Press the **<F2**> key or **right click** in fields containing lookup capability to take advantage of the built in fixed-list lookup lists to select from.

Access the lookup list for a field by positioning the cursor on the field and pressing the **F2** function key (or right-clicking the mouse). When an item from the list is selected, its value is automatically entered in the claim form field. For example, **Patient Sex** typically has 3 possible values: "**M**" (male), "F" (female), and "U" (unknown).

Type "<ALT>F2" (press the <F2> key while holding the <ALT> key down) to identify all fields that support a lookup list. Press the <ESC> key to disable the flashing notification (Figure 29).



• Variable-List Lookups – Applies primarily to fields whose values are selected from the reference files completed in **Reference File Maintenance** in the 'Getting Started Using PC-ACE' section above.

If any information in the variable-list lookups selected from the reference files is incorrect and cannot be changed within the claim form, exit the Claim Form and make the necessary change(s) directly to the proper reference file.

For example, selection of a patient from the variable-list lookup completes numerous patient- related fields on the claim. Access variable list lookups using the same method described above for fixed-list lookups.

- Institutional Claim Form Patient Info & Codes | Billing Line Items | Payer Info | Diagnosis/Procedure | Diag/Proc (2) | Extended General | Ext. General (2) | Extended Payer 1 LOB MCA FI 1 FL 2 Patient Control No. Type of Bill Patient Last Name First Na Suffix Statement Covers Period \_/\_/ Patient Zip Country Patient Phone Patient City Patient Address 1 Patient Address 2 State E 1 FL 38 Birthdate Sex MS Admission A-Hou Typ Src D-Hour Stat Medical Record No Occurrence ode Date Occurrence ode Date Occurrence ode Date Occurrence Span From Occurrence Span From Thr Thru Code 11 11 11 ローノ 11 \_/\_/. 11 11 11 11 11 11 1 / / 111 Value Value Value Value Code Code Code Amount Code Amount Code Amount Cod Amount Amount Figure 30 <u>S</u>ave Cancel
- Right click in the Patient Control No. field (Figure 30).

• Then select the patient that will be entered on the claim form (Figure 31) from the reference file Patient Selection to auto-populate the values from the Patient Selection record into the claim form (Figure 32).

👖 Patient Selectio	on							
PCN	Last Name	First Name	MI	DOB	LOB			
SMITHJN9900000	0A SMITH	JOHN	L	03/17/1956	MCA			
							<b>_</b>	
							<u> </u>	
	ent PCN 🔿 Patient N	ame						
List Filter Options								
	ents (no filter applied)							
C Filter list to inc	clude Patient PCNs starti	ing with						
<ul> <li>Filter list to inc</li> </ul>	clude Patient Names star	ting with						
								Figure 3
<u>N</u> ew	⊻iew/Update <u>D</u>	elete				<u>S</u> elect	<u>C</u> ancel	. igere e
					_			

Institutional Claim Form	×
Patient Info & Codes   Billing Line Iter	ms   Payer Info   Diagnosis/Procedure   Diag/Proc (2)   Extended General   Ext. General (2)   Extended Payer   🔤
LOB MCA FL 1	FL 2 Patient Control No. SMITHJN99000000A Type of Bill
Patient Last Name SMITH	First Name         MI         Suffix         Fed Tax ID         Statement Covers Period           JUDHN         L
Patient Address 1 1 HOSPITAL DRIVE	Patient Address 2         Patient City         State         Patient Zip         Country         Patient Phone           JEFFERSON VALLEY         NY         10535:
Birthdate         Sex MS         Admission           03/17/1956         M        /_/	A-Hour Typ Src D-Hour Stat Medical Record No. Condition Codes
Occurrence Code         Occurrence Date          /_/        /_/          /_/        /_/	Occurrence         Occurrence         Occurrence         Occurrence         Span         Occurrence         Span           Code         Date         Code         From         Thru         Code         From         Thru
Value Value Code Amount Code Amou	Value Value Value Value Value Value ant Code Amount Code Amount Code Amount Code Amount Code Amount Code Amount

#### Figure 32

• **Cancel Field Changes** - When a change is inadvertently made to the contents of a field, press the **ESC** key to cancel this change and restore the field's original content. This feature is available for most claim form fields.

Enter the appropriate information required for the Institutional claim form utilizing the mouse to click into a field or press the **<TAB>** button to progress through the form.

The sections/tabs display fields in the same order as a hardcopy Institutional claim form (Figure 33).

The Institutional claim form contains eight sections (tabs):

- Patient Info & Codes
- Billing Line Items
- Payer Information
- Diagnosis/Procedure
- Diag/Proc (2)
- Extended General
- Extended General (2)
- Extended Payer

Institutional Claim Form
Patient Info & Codes Billing Line Items Payer Info Diagnosis/Procedure Diag/Proc (2) Extended Genera Ext. General (2) Extended Payer
LOB MCA FL1 FL2 Patient Control No. Type of Bill
Patient Last Name First Name MI Suffix Fed Tax ID Statement Covers Period
Patient Address 1 Patient Address 2 Patient City State Patient Zip Country Patient Phone
Birthdate Sex MS Admission A-Hour Typ Src D-Hour Stat Medical Record No Condition Codes
Occurrence Occurrence Occurrence Occurrence Span Occurrence Span
Code Date Code Date Code Date Code From Thru Code From Thru
Value Value Value Value Value
Code Amount Code Amount Code Amount Code Amount Code Amount Code Amount
Save Cancel

#### • Patient Info & Codes Tab

This tab includes fields for general claim and patient information as well as the Condition, Occurrence, Span, and Value code fields.

Enter the patient information manually during claim entry *or* while the cursor is displayed in **Patient Control Number**, press <**F2>** or **right click** to access a list of patients from which to select in reference file maintenance record (Figure 34).

Institutional Claim Form
Patient Info & Codes Billing Line Items Payer Info Diagnosis/Procedure Diag/Proc (2) Extended General Ext. General (2) Extended Payer
LOB MCA FL1 FL2 Patient Control No Type of Bil 1
Patient Last Name First Name MI Suffix Fed Tax ID Statement Covers Period
Patient Address 1 Patient Address 2 Patient City State Patient Zip Country Patient Phone
Bithdate Sex MS Admission A-Hour Typ Src D-Hour Stat Medical Record No. Condition Codes
Occurrence Code         Occurrence Code         Occurrence Code         Occurrence Code         Occurrence From         Operation           ///         ////         /////         /////         /////         /////         /////         //////           ////         /////         /////         /////         /////         /////         /////
Value
Save Cancel

• Once the patient is highlighted, click on the SELECT button (Figure 35). The Patient Info & Codes tab will be displayed with data elements populated from the Patient Selection record. Press Tab or point and click to make any modifications to a form locator on the Patient Info & Codes tab.

Patient Sele	cuon					<u>_</u> _×	
PCN	Last Name	First Name	MI	DOB	LOB	▲	
MITHJN99000	000A SMITH	JOHN	L	03/17/1956	MCA		
						▼	
Sort By: 💽 P	atient PCN 🕜 Patient Na	me					
	ins						
List Filter Optio	atients (no filter applied)						
			_				
Show all p		itle					
<ul> <li>Show all p</li> <li>Filter list to</li> </ul>	include Patient PCNs starting						
<ul> <li>Show all p</li> <li>Filter list to</li> </ul>							
<ul> <li>Show all p</li> <li>Filter list to</li> </ul>	include Patient PCNs starting		_			Select <u>C</u> ancel	Figure

• If the patient is not in the **Patient Selection** select <u>New</u> (Figure 36).

Patient Selecti	on						
PCN	Last Name	First Name	MI	DOB	LOB		<u>^</u>
							<b>N</b>
Sort By:  Patier	nt PCN C Patient Name						
- List Filter Options -	its (no filter applied)						
	ude Patient PCNs starting wi	-	-				
Filter list to include the second	ude Patient Names starting v	with					
New	/iew/Update Delete	1			Г	Select	Cancel
						2	

Figure 36

• Enter in the following fields (Figure 37)

Patient Information	
General Information Extended Info Primary Insur	ed   Secondary Insured   Tertiary Insured
Last Name First Name DDE JOHN	MI Gen Patient Control No (PCN)
Patient Address Address I STATE DRIVE City State Zip INDIANAPOLIS IN 45245- Notes	Patient Status         Active Patient       Y       Discharge Status         Sex       F       Death Ind         DOB       11/11/1919       DOD       _/_/         Marital Status       Signature On File          Employment Status       Release of Info
	<u>S</u> ave <u>C</u> ancel

- Fi	aυ	re	37

Last Name/First Name/MIEnter patient's name.Patient Control No (PCN)Enter patient control number selected by the facAddressEnter patient's address.City/State/ZipEnter city, state, and ZIP code.PhoneOptionalSexEnter "M" for male or "F" for female or "U" for unkrDOB (date of birth)Enter the date in the MM/DD/CCYY format.
--

• Select the Extended Info tab. Press <F2> or right click in the Primary Provider ID (Institutional use only) field and select the Provider record (Figure 38).

Patient Information
General Information Extended Info Primary Insured (Inst) Primary Insured (Prof) Secondary Insured
Patient Legal Representative Information (Professional use only)
Name (L/F)
Address
Country Phone (
Primary Provider ID (Institutional use only)
Provider ID 000000 (press F2 to select)
Different Der state in Der (Der Geschendung en die)
Billing/Rendering Provider IDs (Professional use only)
Billing Provider ID (press F2 to select)
Rendering Provider ID
,
<u>S</u> ave <u>C</u> ancel

• **Primary Insured** tab if not populated (Figure 39).

atient Information		X
General Information Extended Info Primary Insure	ed (Inst) Primary Insure	d (Prof) 🛛 Secondary Insured 🛛 💶 🕨
Payer ID Payer Name 13201 MEDICARE PART A - NY Group Name Group Number	LOB MCA Claim Office	Insured Information Options C Common Inst & Prof Separate Inst & Prof
I Insured Information (F7) Employer Information (F	8)	Clear All Fields For Insured
Rel         Last Name         First Name           18         DOE         JOHN	MI Gen	Insured ID 990000000A
Address T MAIN STREET	Sex M DOB 06/25/1931	Assign of Benefits
City         State         Zip           NEW YORK         NY         10017-1001           Country         Phone	Employ Status	ROI Date _/_/ Retire Date _/_/
[(212) 111-1111		
		Save Cancel

• Enter the following information:

#### Field Name

#### Action

Payer ID

Press the **<F2>** key or right click to show the list, and then select the appropriate payer for the state

<b>Rel</b> (relationship to insured)	contracted with. Press the F2 key and enter the appropriate relationship to insured code Enter: "18" for self "01" for spouse "19" for child
Last Name/First Name/MI	Enter insured's name.
Insured ID	Enter Medicare Health Insurance Number.
Address	Enter the primary insured's address.
City/State/Zip	Enter city, state, and ZIP code.
Phone	Optional
Sex	Enter <b>"M</b> " for male or <b>"F"</b> for female or <b>"U"</b> for unknown.
DOB (date of birth)	Enter the date in the MM/DD/CCYY format.

- Select **Save**.
- The Institutional Claim Form box will appear again (Figure 40).

Institutional Claim Form	
Patient Info & Codes Billing Line Items Payer Info Diagnosis/Procedure Diag/Proc (2) Extended General Ext. General (2) Extended Payer	
LOB MCA FL 1 FL 2 Patient Control No. 123456789 Type of Bil 111	
Patient Last Name         First Name         MI         Suffix         Fed Tax ID         Statement Covers Period           DDE         JDHN         M         123451234         06/06/2009         06/07/2009	
Patient Address 1         Patient Address 2         Patient City         State         Patient Zip         Country         Patient Phone           1 STATE DRIVE         INDIANAPOLIS         IN         45245         I          FL 38	
Bithdate         Sex MS         Admission         HR Type SRC D HR Stat         Medical Record No.         Condition Codes           11/11/1919         F         06/06/2009         20         3         7         22         20         2233445556 <t< td=""><td></td></t<>	
Occurrence         Occurrence         Occurrence         Occurrence         Occurrence         Span         Code         Date         Code         Date         Code         From         Thu         From         Thu         From         Thu         Code         From         Thu         <	
Value Value Value Value Value Value Value Code Amount	Figure 4(
Save Cancel	

#### • Billing Line Items Tab

Enter the services/supplies rendered to the patient. Eight claim lines are displayed at a time on the window. The user can use the **<Scroll Up>** and **<Scroll Down>** buttons to move up and down within the claim (Figure 41).

This tab also includes extended line item fields, and line-level MSP/COB fields. For detailed information on entering Medicare Secondary Payer claims, download the PC-ACE Quick Reference Guide: Medicare Secondary Payer.

lt	em Details   E				)etails 2 (Line		)/Proc (2) │ Exte				
N	42 4 Rev.Cd. HCf	4 - PCS 1	44 - Modifie 2 3	ers 4	44 Rate	45 - Se From Date	ervice Date Thru Date	46 Units/Days	47 Total Charges N	48 Ion-Cov Charge	is
											_
2											1
3											
4											
5											
6	<u> </u>	— <u>`</u>	ΓĒ								
7											
B					, <u> </u>			<u> </u>			₹
					,			,	·		-
							Recalculate	Totals:	0.00	0.00	

• Line Item Scrolling - The Billing Line Items tab displays 8 claim lines at a time. For claims that contain more than 8 line items, the user may scroll through the claim line items one line at a time or one page (i.e., 8 lines) at a time using the buttons provided along the right edge of this tab.

The **up/down arrow keys can be utilized** to move from line to line, scrolling when appropriate.

Type **<ALT><PAGE UP>** (press the **Page Up** key while holding the **ALT** key down) or **<ALT><PAGE DOWN>** to scroll up/down through all claim line items one page at a time.

- Line Item Features The following productivity features are available on the Billing Line Items tab:
- Field Duplication -- Press the F4 key while positioned on a specific field on a line to copy the value of that single field from the previous line into the current line
- Line Duplication Press the F5 key while positioned on any field on a line to copy the values in all fields of the previous line into the current line.
- Line Deletion Press the F7 key while positioned on any field on a line to delete the line. A prompt to confirm the deletion. Alternatively, enter the value DEL (that's an asterisk plus "DEL" plus another asterisk, without the double-quotes) into the HCPCS field on a claim line to delete the line. Make sure the field is highlighted to enter \*DEL\*. Claim lines are automatically re-sequenced by Revenue Code when a claim is saved. As such, there is no need to provide line rearrangement capabilities.
- Advance To Next Line Press the F8 key while positioned on any field on a line to automatically advance the cursor to the first field of the next line, skipping over any remaining fields on the current line.
- Jump To Narrative Press the <ALT>N key combination while positioned on any field on a line to automatically position on the "84 - Remarks" field. Enter the desired narrative text and press the <TAB> key to return to the original line field.
- Line Item Totals Recalculation The Billing Line Items tab provides a Recalculate button located near the bottom of the tab adjacent to the totals fields. Click this button to recalculate and update the Total Charges and Total Non-Covered Charges fields from the current claim line item charges values. Note: This button may

not be available on some installations.

• Payer Info Tab

Enter payer, provider, insured, and employer fields for the primary, secondary, and tertiary payers that need populating.

• Diagnosis/Procedure

Enter diagnosis codes, procedure codes and dates and physician information.

• Diag/Proc (2)

Enter additional diagnosis codes, procedure codes and dates, and claim-level provider information.

- Extended General Enter any additional patient and general claim-level fields.
- Extended General (2)

Enter additional condition/occurrence/span/value codes.

• Extended Payer

Less frequently used payer, insured, and authorization fields for the primary, secondary, and tertiary payers. Also includes fields for MSP and other secondary claims where Coordination of Benefits (COB) information is required. This major tab consists of a number of second-level tabs that provide access to this extended information in a logical and efficient manner.

- Click **Save** when finished entering the claim.
- During the claims **save** operation, an edit validation process is performed on all fields. If no edit validation errors occur, the claim patient record is saved without further correction and a new Institutional claim form will appear allowing entry of another claim.
- When edit validation errors occur, double-click the error message to jump to the corresponding field in error. Several **Save** attempts may be required to correct and save a "clean" claim. Refer to the **Claim & Reference File Edit Validation** topic for a more complete discussion of the claim edit validation process.
- Once finished entering claims, the claims are now ready to be prepared for transmission (Figure 42). See Prepare Claims Function.
   Note: Use the Help Feature in PC-ACE for more information on "Listing, modifying and maintaining claims.

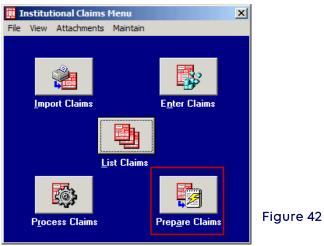
# Section 4 - Additional Claim Features

### Copying Claims

Claims for the *same* patient can be copied and then modified instead of creating a new claim each time. Simply copy the previous claim, modify the dates of service and/or any other pertinent information, and then save it.

- 1. In the Institutional Claims Menu window, select List Claims.
- 2. In the **Institutional Claim List** window, in the bottom left section of the screen, choose the Location of **TR** transmitted only.
- 3. Put a check mark in the box in front of the claim(s) to be copied.
- 4. On the Actions Menu, select Copy All Checked Claims. Select OK in the confirmation window. Note: If only one claim was checked to be copied, the Institutional Claim Form will be displayed instead of the Institutional Claim List window.

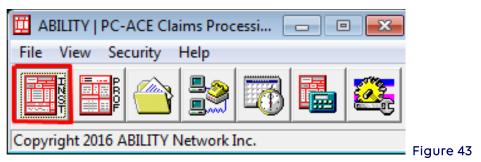
- 5. Change the dates of service and **Save** the claim.
- 6. In the bottom section of the window, select the Location of CL to be transmitted. The claims will be listed and have a status of UNP.
- 7. Double-click each claim in turn, enter new dates of service, and <u>Save</u>.



# Reactivating Previously Transmitted Claims and Reactivation of Individual Claims

To resubmit a transmitted claim, these claims must first be reactivated. Only claims in the **transmitted (TR)** location may be reactivated.

1. Select the **Institutional** icon from the **PC-ACE Claims Processing System** main menu (Figure 43).



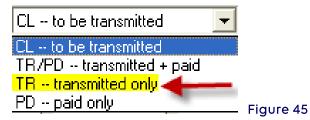
2. Select List Claims (Figure 44).





Figure 44

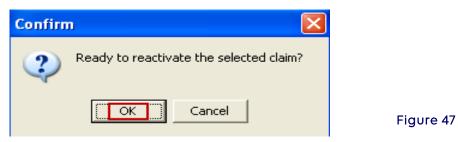
- 3. Select Location (Figure 45).
- 4. Select CL (to be transmitted) or TR (transmitted only).



- 5. Check one claim or several claims to be reactivated.
- 6. Select Actions (Figure 46).
- 7. Select either **Reactivate Selected Claim** (if only one claim) or **Reactivate All Checked Claims** (for more than one claim).

File	Filter	Actions	Reports													
	Status	Refre	sh Claim List	F5												
	CLN	Creat	e New Claim													
	CLN	View :	5elected Claim													
	CLN	Сору	Selected Claim													
	CLN	Deleti	e Selected Claim													
	CLN	Purge	Selected Claim													
		React	ivate Selected Claim 🔫	_												
	CLN	Hold 9	Selected Claim													
	CLN	Print :	5elected Claim													
	CLN	Archiv	ve Selected Claim													
	CLN	Show	Selected Claim Payments	s												
	CLN	Set Set	elected Claim Media													
	CLN	Сору	All Checked Claims													
		Deleti	e All Checked Claims													
		Purge	All Checked Claims													
		React	ivate All Checked Claims	←												
		Hold /	All Checked Claims	-	l Ei	a	ιı	ur	ure	ure	ure 4					
		Print /	All Checked Claims			3	-			••••	••••	••••	••••		••••	
		Archiv	/e All Checked Claims													
		Set A	l Checked Claims Media													

- 8. The Confirm box appears (Figure 47).
- 9. Select **OK** to reactivate claim/claims.



10. Change Location field to CL-to be transmitted (Figure 48).

le Filter Actions Repor	5.65	1					
Status LOB PCN	Patient Last	Bill Provider		Entered	Serv. From	Serv. Thru	Total Chgs. Med
UNP MCB DOE JO	IN DOE	1234567893	Solo	09/23/2013	09/14/2013	09/15/2013	\$150.00 E
1							
Sort By: (* Patient Name		Date C Service D	ate				
Sort By: (* Patient Name Claim List Filter Options	C PCN C Erray D	Date C Service D	ale				
Sort By: (* Patient Name Claim List Filter Options				08: [<< Al >>	-		
Sort By: (* Patient Name		Þate ⊂ Service D		08: [<< Al >>			

- 11. Reactivated claims will be listed with a status of **UNP**. These must be corrected before sending.
- 12. Either double click the claim to open and make the necessary corrections and select **Save** (Figure 49), or see the **Processing Reactivated or Imported Claims** section to Process a multitude of claims.

Institutional Claim Form
Patient Info & Codes Billing Line Items Payer Info Diagnosis/Procedure Diag/Proc (2) Extended General Ext. General (2) Extended Payer
LOB ICA FL 1 FL 2 Patient Control No. 123456789 Type of Bill 721
Patient Last Name         First Name         MI         Suffix         Fed Tax ID         Statement Covers Period           DDE         JOHN         10/10/2009         10/10/2009         10/10/2009
Patient Address 1         Patient Address 2         Patient City         State         Patient Zip         Country         Patient Phone           115 STATE DRIVE         INDIANAPOLIS         IN         45245         []         FL 38
Birthdate         Sex MS         Admission         HR Type SRC D HR Stat         Medical Record No.         Condition Codes           11/11/1919         F         _/_/         F         _/_/         F         _//_
Occurrence Code         Occurrence Date         Occurrence Code         Occurrence Date         Occurrence Code         Occurrence From         Occurrence Thru         Occurrence Code         Occurrence From         Occurrence Thru         Occurrence Thru <t< td=""></t<>
Value     Value     Value     Value     Value     Value       Code     Amount     Code     Amount     Code     Amount       Image:
<u>Save</u>

13. The claim status will change to **CLN.** These claims are now ready to be prepared and transmitted. See **Prepare Claims** instructions.

#### Claim Import Function

When entering claims manually in the PC-ACE software and not importing a claims file in an Electronic Media Claims (EMC) format, skip this section entirely.

For more information on the importing of UB92 Version 6.0 formats and Print Image, please review the HELP and enter "claim import" in search field.

#### PC-ACE ANSI 837I Claim Import Capability (Importing ANSI 837I Claim Files)

Providers can translate and import claims files in the ANSI 8371 version format, for subsequent editing, ANSI 837 formatting and transmission. The ANSI 8371 import capability by default is **not** activated in PC-ACE.

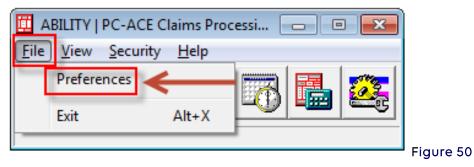
The Claim Import function can be utilized for MSP claims that need to be updated or corrected and your claims software is not capable of doing so.

This feature should only be activated if the ANSI 837I files have already been validated as structurally sound and complete. It *should not* be used as an ANSI 837I testing validation tool.

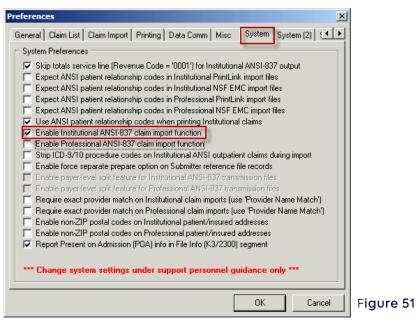
**Note:** Only those data elements supported in PC-ACE will be imported from the ANSI 837I file. Any unsupported segments and data elements present in the imported ANSI 837I file will be ignored.

To **activate** this feature for importing ANSI 837 4010A1X12 files, perform the following:

1. From the PC-ACE main toolbar select **File, then Preferences** menu items and login when prompted (Figure 50).



- 2. While viewing the Preferences screen, type the ampersand (&) character (i.e., <SHIFT>7). An additional tab labeled System will appear.
- 3. Select the **System** tab and check the **Enable Institutional ANSI-837 claim import function** option.
- Select OK to save the changes. These new settings will take effect immediately. (Figure 51)



5. Ensure all Provider records are set up prior to importing files (See instructions on adding/checking a provider record).

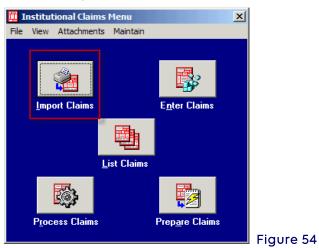
6. Name the claim import files with a **.DAT** (*dot* DAT) file extension and copy them into the C:\WINPCACE\IMPUB92 directory (Figure 52).

🗃 Impub92					_10	×
File Edit View Favorites Tools	Help					7
🌏 Back 🔹 🕥 🖌 🏂 🔎 Sea	irch 😥 Fold	lers 🛛 🕞 🎯	🗙 🍤 💷 - 🥵 Fold	ler Sync		
Address 🗁 C:\WINPCACE\Impub92					💌 🄁 Go	•
Name 🔺	Size	Туре	Date Modified			
Ansi837u.ctl	3 KB	CTL File	11/18/2008 8:20 AM			
Ansi837u.imp	64 KB	IMP File	8/13/2012 1:13 PM			
🛅 ansi_int.tmp	2 KB	TMP File	10/10/2013 2:50 PM			
📷 mapcntlu.win	10 KB	WIN File	6/18/2007 8:29 AM			
Mapcntlu.wv2	23 KB	WV2 File	6/18/2007 9:09 AM			
🖬 mapoffu.win	1 KB	WIN File	1/5/2006 1:33 PM			
Mapoffu.wv2	1 KB	WV2 File	9/22/2003 9:37 PM			
plxlater.exe	79 KB	Application	10/21/2009 10:36 AM			
	5 KB	DAT File	10/10/2013 1:43 PM			
objects				183 KB	🚽 My Computer	1

7. On the main toolbar select the Institutional Claims Processing Menu icon (Figure 53).

🔟 ABILITY   PC-ACE Claims Processi 💼 📧 💌	
File View Security Help	
Copyright 2016 ABILITY Network Inc.	Figure 53

8. Select the Import Claims button (Figure 54).



9. The Institutional Claim Import window will appear. Select Import (Figure 55).

Institutional Claim Import (EMC File)	
Import Progress	
Claim Import Totals Count Dollar Value Imported Claims00.00 Rejected Claims00.00	
Import Close	Figure 55

10. A **Confirm** window will be displayed. Select **OK** to continue (Figure 56).

Confirm	×	
2	Ready to start the claim import process?	
	Cancel	Figure 56

11. When the import process is complete an **Information** window will be displayed to indicate that the operation was completed successfully. Select **OK** (Figure 57).

Informa	tion X	
(į)	The claim import operation has completed successfully.	
	ОК	Figure 57

- 12. The **Institutional Claim Import (EMC File)** window will be displayed. The status bar indicates the operation is complete. The window should contain a count of imported and rejected claims as well as dollar amounts for each area.
- 13. It is possible to print a report of imported claim information. Click on the <u>View Results</u> button to view the report (Figure 58).

Institutional Claim In				
Claim import operation of	complete		_	
Claim Import Totals -	Count	Dollar Value		
Imported Claims	1	1440.00		
Rejected Claims	0	0.00		
		/		
<u>V</u> iew Results		<u>C</u> lose		Fiaure 58

14. The **PC-ACE Claim Import Detail Report** will appear in display mode (Figure 59).

Loom	00 ÷ 🔍 🔍	Page 1 of	1	Glose					
	the second		tourised	furnersonner billing				*	
	ABT	TTTY I	PC-ACE	CLAIM IMPO	T DETATT. P	FPOPT			
		Import Da	te: 04/1	.3/2016 Sourc	e: BSTRANS.DA	<b>1</b> 0			
-									
LOB	PROVIDER	PATIENT	T CTRL	PATIENT NAME	SERVICE D	ATES	CHARGES		
3/4.5		1902,000			10/10/10/10/10	10.000	1000		
MCB		SMITHJ	199900000	SMITH, JOHN	02/02/13 02	/02/13	\$25.00		
REP	ORT TOTALS:		CLAIMS	BILLED	CHARGES		15	_	
	MEDICARE	CLATMS	1		\$25.00				
	BLUE SHIELD		0		\$0.00				
	MEDICAID		0		\$0.00				
	COMMERCIAL	CLAIMS	0		\$0.00				
	TRICARE	CLAIMS	0		\$0.00				
	OTHER	CLAIMS	0		\$0.00				
	TOTAL	CLAIMS	1		\$25.00				
	TOTAL	CLAIMS	*		\$25.00				

15. Select the printer icon to print the report or select the **Close** button at the top of the report page to exit from the report view (Figure 60).

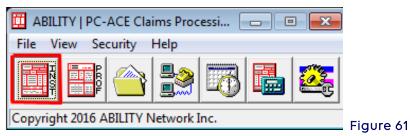
Institutional Claim Import (EMC File)								
Claim import operation c	omplete							
Claim Import Totals —	Count	Dollar Value						
Imported Claims	1	3150.00						
Rejected Claims	0	0.00						
[∐iew Results]		Close	Figure 60					

- 16. Select <u>Close</u> to return to the Institutional Claims Menu (EMC File).
- 17. Once a file of claims has been imported the user can then run the Process Claims option and "scrub" all the claims for editing. Claims that are imported must be processed.

#### Processing Reactivated or Imported Claims

Claims that have been reactivated or imported need to be processed before preparing the claims file. Newly entered claims do not need to be processed before being prepared.

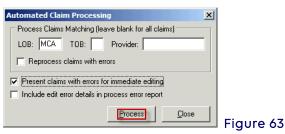
1. On the main toolbar select the Institutional Claims Processing Menu icon (Figure 61).



2. Select the Process Claims button (Figure 62).



3. The **Automated Claim Processing** window will be displayed. Fill out any fields desired or leave all fields blank and select the **Process** button (Figure 63).



LOB:	The line of business of claims to be processed
ТОВ:	Constrain the data to process only a certain type of bill
Provider:	Constrain the data to process only the selected provider's claims
Present claim with errors:	Check to present claims with errors for immediate editing if the claims were not cleaned up while in claims list

4. A Confirm window will be displayed. Select OK (Figure 64).

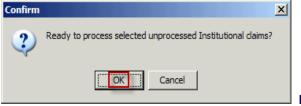
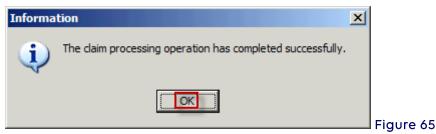


Figure 64

5. When the process claims is complete an Information window will be displayed to indicate that the operation was completed successfully. Select the **OK** button (Figure 65).



6. The **Automated Claim Processing** window will be displayed which gives the user a visual of the total number of claims that were processed clean (no errors), processed

with errors and/or unprocessed claims (like duplicates) (Figure 66).

Automated Claim Processing		2	<u>&lt;</u>	
Claim processing complete.			1	
Claim Processing Totals	Count	Dollar Value		
Processed Clean (No Errors)	2	4590.00		
Processed With Errors	0	0.00		
Unprocessed Claims	0	0.00		
View Results		<u>C</u> lose	Figure	• 6

- 7. Select the  $\underline{C}$  lose button or select the  $\underline{V}$  iew Errors button.
- 8. When the <u>View Errors</u> button is selected, the Adobe Acrobat will display the report, select the printer icon to send the report to the printer or select <u>Close</u> to return to the institutional claims list window (Figure 67).

		Page 1 of 1		Close			
	ABILI	TY   PC-A	CE CLAIM	PROCES	SING DETA	IL REPORT	6
		Process	Date/Time:	04/13/201	6 16:56:30		
LOB	PROVIDER	PATIENT CTR	L PATIENT	NAME	SERVICE	DATES	CHARGE
МСВ	1234567893	SMITHJN9990	0000 SMITH,J	OHN	02/02/13	02/02/13	25.0
-	RT TOTALS:	c	LAIMS	BILLED	CHARGES		
REPO					\$25.00		
REPO	MEDICARE	CLAIMS	1		420.00		
	MEDICARE BLUE SHIELD		0		\$0.00		
		CLAIMS	0		100000000		
	BLUE SHIELD	CLAIMS CLAIMS			\$0.00		
	BLUE SHIELD MEDICAID	CLAIMS CLAIMS CLAIMS	0		\$0.00 \$0.00		
	BLUE SHIELD MEDICAID COMMERCIAL TRICARE	CLAIMS CLAIMS CLAIMS	0		\$0.00 \$0.00 \$0.00		

Figure 67

#### Reactivating an Entire Batch of Claims

Changes cannot be made to a batch of claims that has been reactivated. This operation will restore the batch of claims so that it can be retransmitted. When changes need to be made to claims that have already been transmitted, see the section titled **Reactivating Claims**.

- 1. In the **Institutional Claims Menu** window, select the **Maintain Menu and select Transmission Log**. The **Institutional Claims Transmission Log** window will be displayed.
- 2. Select the batch of claims to reactivate. When uncertain which batch should be selected, highlight the line, then **select** the **View Details** button to see Transmission Detail report for the batch.
- 3. Once it has been determined which batch of claims to reactivate, **highlight** the line and select the

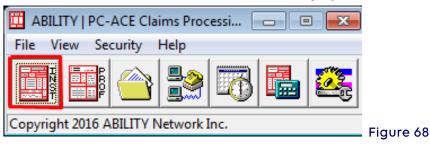
**Reactivate** button. Read each window that pops up, then select **OK** in each.

4. Do **not** prepare the claims file when reactivating an entire batch of claims. Simply transmit the claims file as normal.

## Section 5 - Prepare Claims Function

Medicare claims must be prepared and transmitted using communication software before another batch can be prepared. Failure to follow these instructions will overwrite the previous claim file. When ready to prepare claims for transmission, do the following:

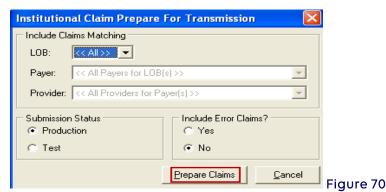
1. Select INST from the PC-ACE Claims Processing System main menu (Figure 68).



2. Select Prepare Claims (Figure 69).



- 3. The Institutional Claims Prepare for Transmission box appears (Figure 70).
- 4. Select Prepare Claims.



5. The **Confirm** box appears and states, "Ready to prepare selected Institutional claims

for transmission?" (Figure 71).

6. Select OK



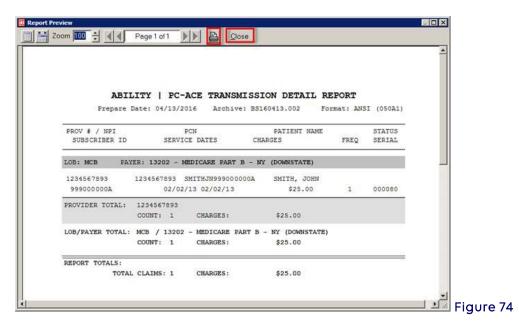
- 7. The **Information** box appears and states, "The claim operation has completed successfully." (Figure 72).
- 8. Select OK.



- 9. The Claim Prepare for Transmission box appears (Figure 73).
- 10. Select View Results.

Claim Prepare For Tran				
Claim prepare operation o	complete			
Prepare Totals	Count	Dollar Value		
Prepared Clean	1	3150.00		
Rejected	0	0.00		
[ <u>V</u> iew Results		<u>C</u> lose		Figure 73

11. PC-ACE Transmission Detail Report will appear. To print this report, select the Print icon (top of tool bar, to the left of the <u>Close button</u>). This report does not confirm the transmission of claims. (Figure 74)



12. The preparation of claims has now been completed. Prepared claims must be transmitted. Continue to the transmission process using the NSV's software.

# Section 6 - Transmission Process

#### Network Service Vendor

All submitters should connect through a NSV and follow their connection/transmission instructions provided by the NSV to send and receive files.

**Note**: For Part A, the claims file to be transmitted created by PC-ACE will be named **TRANS.DAT** by default and will be located in the **C:\WINPCACE** directory.

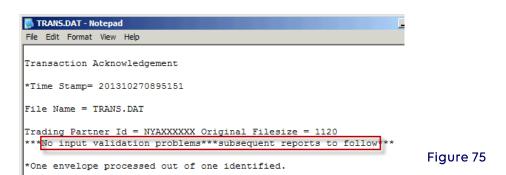
Please see the list of **NSVs** listed on our website under the **Claims & Appeals tab > Electronic Data Interchange Software** if one has not already been selected.

#### Transmission Reports

Once the claim file has been sent, three reports (TRN, 999 and 277CA) will be available for download.

**TRN–**Transaction Acknowledgement (available within a few minutes after transmission. Please note some network software vendors do not update or refresh right away. The file may take 15 minutes or so to become available for download).

- Look for **"No input validation problems subsequent reports to follow"** (Figure 75). Contact the **NGS EDI Help Desk** if any errors appear:
  - o **J6:** 877-273-4334
  - o **JK:** 888-379-9132

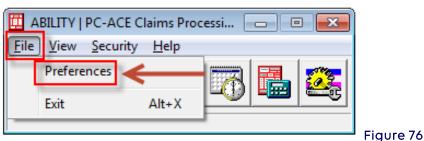


### 999 and 277CA Reports:

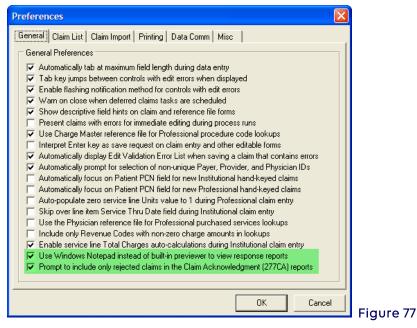
**999 and 277CA files must first be imported into PC-ACE** in order to view them in a readable format (available up to two hours following transmission).

### Importing and Reading the 999 and 277CA Reports

1. Open PC-ACE and click on File then Preferences (Figure 76).



2. Check the first box highlighted. To view only rejected claims in the 277CA report, check the second highlighted box also. To view both accepted and rejected claims in the 277CA report, leave the second box unchecked (Figure 77).

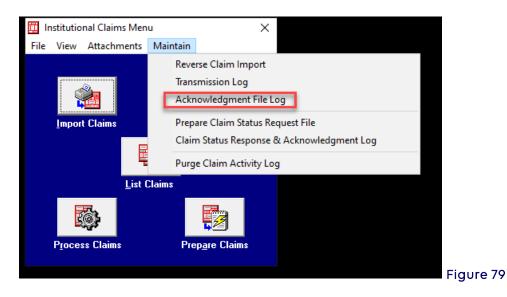


3. In order for PC-ACE to read 999 or 277CA files, they must be saved into the proper subfolder within the WINPCACE folder (Figure 78): **277CA** files need to be saved in the Statub92 (part A) sub-folder, of the Ansi277 folder. **999** files need to be saved in the Ackub92 (part A) sub-folder of the Ansi997 Folder.

WINPCACE		
File Edit View Favorites Tools	Help	2
🕞 Back 👻 💮 🖌 🏂 🔎 Sean	ch 🞼 Folders 🕼 🍞 🗙 🍫 🛄 🖬 Shider Sync	
Address 🗁 C:\WINPCACE		Go
Folders		×
🕀 🧰 Ansi271		
🖃 🛅 Ansi277		
🕀 🧰 Stat1500		_
🗉 🚞 Statub92 ┥	- Save the 277CA in C:\WINPCACE\Ansi277\Statub92	
🗆 🧰 Ansi997	L	
1 CA Ack1500		
🗉 🧰 Ackub92 👞	Save the 999 in C:\WINPCACE\Ansi997\Ackub92	-
4 objects (Disk free space: 4.29 GB)	31.7 MB 😡 My Computer	

**Note:** This process can be set to run from a batch command file. See **Appendix A** at the end of this document for instructions.

4. Once the report files have been moved to the proper folder location, go to the Institutional Claims Menu. Select the **Maintain** menu item, then **Acknowledgement File Log** to read the 999 (Figure 79).



5. The following screen will be displayed to read the 999. From the Acknowledgement File Log screen, select the 999 to be displayed and select **View Ack Report** (Figure 80).

See **Appendix A** for instructions on how to adjust the length of time archived copies are maintained in the system.

Date	Time	Sender	Receiver	# Resp	# Ack	ISA Ctl. #	Group Ctl #	Trans Set #	Posted? A 🔺
10/27/2013	21:40	14412	SUBMITTER ID	0	0	000013766	1	000000001	N/A F
•									<b>⊻</b>

- Look for (Figure 81): Transaction Set Status (IK501): A - Accepted Functional Group Status (AK901): A - Accepted
- If the 999 is **rejected**, no further editing is done and no further reports are created.
- If the 999 is **accepted** or **accepted with errors**, a third report will be received (the **277CA** report)
- To print the report, select the **Print** icon.

File Edit Format View Help Acknowledgment Created (GS04/05): 10/27/2013 20:01 Sender Code (GS02): 06201 Receiver Code (GS03): SUBMITTER ID	<u> </u>
Sender Code (GS02): 06201	4
Sender Code (GS02): 06201	
Receiver Code (GS03): SUBMITTER ID	
Ack Transaction Set Control No (ST02): 0001	
Ack fransaction Set Control No (S102): 0001	
Group Control Number (AK102): 811972	
Version/Release/Industry Code (AK103): 005010X223A2	
Transaction Set Control Number (AK202): 0001	
Implementation Convention Ref (AK203): 005010X223A2	
Transaction Set Status (IK501): A - Accepted	
Functional Group Status (AK901): A - Accepted	
Transaction Sets Included (AK902): 1	
Transaction Sets Received (AK903): 1	
Transaction Sets Accepted (AK904): 1	
	-
4	▶ //:

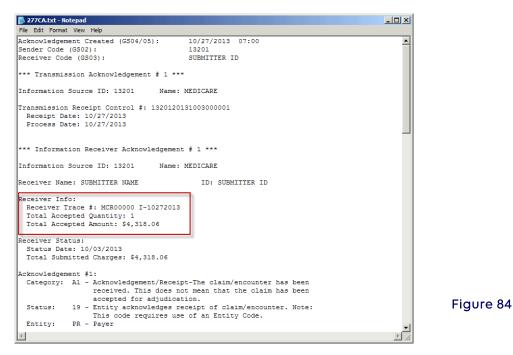
6. To read the 277CA, from the Professional Claim Menu, select **Maintain** and **Claim Acknowledgement Log** (Figure 82).



The following screen will be displayed to read the 277CA. From the Acknowledgement File Log screen, select the 277CA to be displayed and select <u>V</u>iew Ack Report (Figure 83).

)ate	Time	Sender	Receiver	# Ack	ISA Ctl. #	Group Ctl #	Trans Set #	Archive File	~
7/2013	04:56	13101	SUBMITTER ID	3	000089617	1	000000001	RU131217.002	
									~
								>	
<u>V</u> iew Ack	Pepert	Post P	esponse File	Dele	to I	Refresh		<u>C</u> lose	1

Look for **Total Quantity Accepted**. Any claims that **reject** will need to be **corrected** and **resubmitted** (Figure 84):



Scroll down to the **Claim Acknowledgement** for the patient information on each claim and it will show all the details for each claim submitted (Figure 85).

- Claim number
- Patient name/number
- Provider NPI
- HIC Number
- ICN/DCN
- Total charges

	-
*** Claim Acknowledgement # 1 ***	
Information Source ID: 13201 Name: MEDICARE	
Receiver Name: SUBMITTER NAME ID: SUBMITTER ID	
Provider Name: PROVIDER NAME NPI: 1234567893	
Patient:	
Name: SMITH, JOHN	
Subscriber #: 99000000A	
Claim:	
Trace #: 9202443216B081213	
ICN/DCN: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
TOB: 131 Service Date: 08/12/2013-08/12/2013	
Service Date: 06/12/2013-06/12/2013	-
Status General:	
Status Date: 10/27/2013	
Total Submitted Charges: \$4,318.06	
Acknowledgement #1: (Accepted)	
Category: A2 - Acknowledgement/Acceptance into adjudication system	
-The claim/encounter has been accepted into the adjudication	
system.	
Status: 20 - Accepted for processing. Entity: PR - Paver	
rucrol. IN - Inler	-
Total Acknowledgements In This Transaction Set: 4	Figure 85
	i igore oo
*** END TRANSACTION SET (ST/SE) # 000000001 ***	<b>•</b>
1	

## Appendix A: Adjusting Archived Reports Settings

The length of time that archived copies of 999 and 277CA files are kept can be adjusted. From the main menu of PC-ACE, go to **File**, **Preferences**, and click the **Misc** tab (Figure 86).

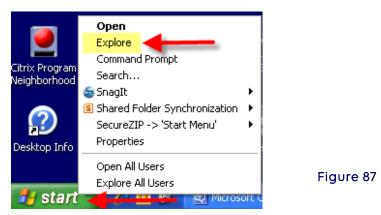
If desired, adjust the first two fields to indicate how long to keep the archived reports. The duration has been set to 1000 days in the example below.

Preferences
General Claim List Claim Import Printing Data Comm Misc
Miscellaneous Preferences
▼ Purge archived EMC transmission files after 1000 🚔 days
▼ Purge archived ANSI-997/999 acknowledgment files after 1000 📩 days
Purge archived ANSI-824 acknowledgment files after 90 📰 days
▼ Purge archived ANSI-277 claim status response or ack files after 1000 📩 days
Purge archived ANSI-271 eligibility benefit response files after 180 📰 days
✓ Purge claim activity log files after 10 → days
Pack database files prior to system backup
Limit initial claim list display of transmitted/paid claims to most recent 24 📩 months
Adobe Acrobat Reader (must be version 4.0 or later):
c:\Program Files\Adobe\Reader 11.0\Reader\AcroRd32.exe
OK Cancel

Figure 86

# Appendix B: Setting up Shortcuts for File Locations

To assist in the placement of new reports shortcuts can be created (Figure 87).



Right click on **Start** and then select File **Explore** (Figure 88).



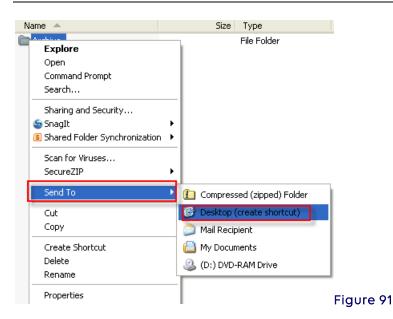
Double click on the **WINPCACE** folder (Figure 89).



Double click on the Ansi277 folder for a 277 shortcut. If desired, repeat this process for A 999 shortcut in which the 997 folder should be selected (Figure 90).



Right click **Statub92** folder for Part A (Figure 91).



Select Send To and then Select Desktop (create shortcut)

Right click on the new folder and rename the folder (i.e., 277CA Reports) with the new folder on the desktop, place all 277CA reports into this folder.

To create a shortcut for 999 reports, repeat this process however, instead of selecting the ANIS277 folder select the ANSI997 folder and continue follow this process by renaming the folder (i.e., 999 Reports).

For further assistance please send an e-mail to EDI at ngs\_edi\_parta@anthem.com or contact the EDI Help Desk:

- **J6**: 877-273-4334
- JK: 888-379-9132

### Appendix C: Troubleshooting

When experiencing problems viewing 999 or 277CA reports, once saved in the correct subdirectory in PC-ACE, it is suggested that a system change be made.

Select **Start** from the desktop, then go to the **Control Panel** select **Folder Options** Select the **View** tab

Under Hidden Files and Folders click on the Hide extensions for known file and folders check box, in order to remove the selection of that option, then click on the Show hidden files and folders radio button to change settings (Figure 92).

Folder Options	
General View File Types Offline Files	
Folder views You can apply the view (such as Details or Tiles) that you are using for this folder to all folders. Apply to All Folders Reset All Folders	
Advanced settings: Files and Folders Automatically search for network folders and printers Display file size information in folder tips Display simple folder view in Explorer's Folders list	
<ul> <li>Display the contents of system folders</li> <li>Display the full path in the address bar</li> <li>Display the full path in the title bar</li> <li>Do not cache thumbnails</li> <li>Hidden files and folders</li> <li>Do not show hidden files and folders</li> </ul>	
Show hidden files and folders     Hide extensions for known file types	
Restore <u>D</u> efaults	
	Figure 92

This will show any hidden file(s) in the WINPCACE directory.

# Section 7 - How to Backup PC-ACE Claims Processing System

Each time the program is exited the following message will appear: "**Perform System Backup?**" An external backup file of the program must be maintained in the event a fatal system crash occurs.

1. To do this, the backup may be placed on the desktop by selecting the **Browse** button and choosing the hard drive (system C) and desktop (Figure 93 and 94).

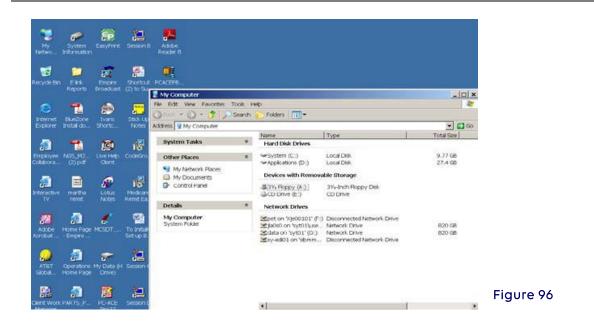
Perform System Backup?			×
Would you like to perform a backup of the P configuration settings? If so, specify a destin folder path and click the 'Start Backup' butto	ation drive (e.g., 'A:\')		
Destination Drive or Folder:			
C:\Documents and Settings\Jla0s0\Deskto	op\		
Include infrequently changed database	files (backup will be l	arger)	
Options	Start <u>B</u> ackup	Cancel	

	Select Backup Destination Directory	<u>?</u> ×
	Look in: 🞯 Desktop	▼ = * = ▼
System Utilities	My Documents	a∄Interactive TV ♠Ivans Shortcut Menu
Backup/Restore File Maintenance	Second Se	Microsoft Office Outlook 2003
Backup Validate Restore	Adobe Acrobat 6.0 Professional	₯System Information 险Elink Reports
This utility performs a backup of the settings. Specify a destination drive	AT&T Global Network Client     BClient Work Manager	🕙 2008 Medicare UpdateAD.doc 🔁 BlueZone Install documentation (2).r
the 'Start Backup' button.	Employee Collaboration Portal	📰 Client Work Manager
Destination Drive or Folder:		<u> </u>
C:\Documents and Settings\Jla0s(	File name: Not used select drive or folde	er only Open
✓ Include infrequently changed data	Files of type:	Cancel
Options	Start <u>B</u> ackup	
	Close	1
	Cluse	

2. This will put the backup file named PCACEPBK.ZIP on to the desktop (Figure 95).

My System EasyPrint Session B Adobe
Netwo Information Reader 8
Recycle Bin E link Empire Shortcut PCACEPBK.
Reports Broadcast (2) to Su ZIP
Internet BlueZone Ivans Stick Up
Explorer Install do Shortc Notes

- 3. From the desktop, save to a CD-ROM or flash drive. This external device must be maintained to ensure the restore capabilities in the event of a fatal system crash.
- 4. Select **My Computer** on the desktop and drag the PCACEPK.ZIP file from the desktop to the CD-ROM and then burn it, or drag to the flash drive (Figure 96).



# Section 8 - Additional Features

### Archiving Claims

Archiving claims in PC-ACE improves performance and helps prevent database corruption.

- 1. Select the **Inst** button on the main toolbar.
- 2. Select the List Claims button.
- 3. Select the File Menu and select Maintain Claim Archives
- 4. Select the **New** button and **enter** a name for the archive, then **select** the **OK** button.
- 5. Select the **Close** button. The **Institutional Claim List** window will be displayed.
- 6. In the **Claims List Filter Options** section at the bottom of the **Institutional Claim List** window, select the drop down arrow and select **TR-transmitted only**.
- 7. Select the **Advanced Filter Options** button near the bottom of the **Institutional Claim List** window, and **enter** the filter criteria.

**Example:** If today's date is 11/11/13, to archive everything except the past three months:

- Check the box in front of "Invert filter logic..." at the bottom of the Advanced Claim List Filter Criteria window.
- In the **Transmit Date:** field, **enter** 08/01/2013 in the first box, and then **enter** 11/11/2013 in the second box.
- Select the **OK** button. The **Institutional Claim List** window will appear and the only claims displayed are those that were transmitted more than three months ago. These are the claims that will be archived.
  - 1. Select the **Filter Menu** and select **check all claims**. Each claim now has a checkmark in the box at the left of the line it's on.
    - i. Select the **File Menu** and select **Open Claim Archive**, then, double-click the archive created in the steps above. An information window will pop up. Read the contents, then, select the **OK** button.

Select the **Actions Menu** and select **Archive All Checked Claims** (near the bottom of the Actions menu.

- ii. Be careful **not** to select Archive Selected Claim, as that will only archive the claim that is highlighted. An information window will pop up. Read the contents, and then select the **OK** button.
- 2. The claims are no longer shown in the list. The claims are not gone but they have been stored in the archive. To see these claims, select the **File** menu, and then select **View Archived Claims**.
- Once PC-ACE has been exited, to view these claims again: a.Open the claims list
  - b.Select the  $\ensuremath{\textit{File}}$   $\ensuremath{\textit{Menu}}$  and select  $\ensuremath{\textit{Open}}$   $\ensuremath{\textit{Claim}}$   $\ensuremath{\textit{Archive}}.$
  - c. Double-click the archive to view, read the information in the pop up Information window, and then select the **OK** button.
  - d.Select the File Menu and select View Archived Claims.
  - e.To see current claims, select the **File Menu** and select **View Current Claims**.

## Transferring PC-ACE to Another Computer

- 1. On the old computer, upgrade PC-ACE to the current version.
- 2. On the new computer, **install** the full installation of the current version from our Web site.
- 3. On the old computer, **open** PC-ACE.
- 4. On the main toolbar, select the **last** button, which has a gear and a wrench on a French flag.
- 5. Sign in. The **System Utilities** window is displayed, the **Backup/Restore** tab should be selected and the **Backup** sub tab displays the text "This utility performs a backup..."
- 6. Select the small button with three dots on it at the right end of the **Destination Drive** or **Folder** field.
- 7. In the Select **Backup Destination Directory** window, select the drop down arrow at the right end of the "**Look in**" field, select **Desktop** which should be at the very top of the list, then select the **Open** button. The **System Utilities** window will be displayed.
- 8. Select the **Start Backup** button and select the **OK** button in the **Confirm** window.
- 9. After the backup operation completes, the Information window will display. If the text states "The backup operation has completed successfully" then select the OK button. Note: If the text indicates that the backup failed, please contact the NGS EDI Help Desk:

**J6:** 877-273-4334 **JK:** 888-379-9132.

- 10. In the System Utilities window, select the Validate sub tab, browse to the Desktop as in the earlier steps, then select the Start Validate button, select the OK button in the Confirm window. When the validation is complete, the Information window will be displayed with the text "The validation operation has completed successfully." Note: If the text indicates that the validation failed, please contact the NGS EDI Help Desk.
- 11. Select the **OK** button in the **Information** window and select the **Close** button in the **System Utilities** window.

- 12. The backup file on the desktop is named PCACEPBK.ZIP. **Copy** this file to the **Desktop** of the new computer.
- 13. On the new computer, open PC-ACE and on the main toolbar, select the last button, which has a gear and a wrench on a French flag (as directed above).
- 14. Sign in. The **System Utilities** window is displayed, the **Backup/Restore** tab should be selected and the **Backup** sub tab displays the text "This utility performs a backup..."
- 15. Select the **Restore** sub tab, browse to the Desktop, and select the **Open** button. It is not necessary to select the file because the program knows the file name already.
- 16. Continue with the restore, following the prompts. Once it's complete, PC-ACE on the new computer is identical to what was on the old computer.