PC-ACE Quick Reference Guide for Part B Providers

Table of Contents

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 National Government Service (NGS).

Minimum System Requirements

- SVGA monitor resolution (800 x 600)
- Windows 10, Windows 8.1, Windows 7 or Vista operating system
- 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 CMS-1500 claim form will not display properly at lower screen resolutions.

PC-ACE Part B Full Install Instructions

Note: These instructions are designed for use with Microsoft's **Edge, Google Chrome or Firefox**. The use of other browsers is not supported by the NGS EDI Help Desk.

Steps 1–7 only need to be completed 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. On the NGS landing page, select your line of business and state then select Enter.
4. Select **RESOURCES** dropdown at the top of the web page.
5. Select **EDI Solution**s.
6. Select **EDI Software PC-ACE** then select **Download PC-ACE** to download the software.
7. On the **PC-ACE Download** form, complete all required fields marked with an asterisk (*).
8. Under **Select Your Download Below**, select the radio button option for **PC-ACE Full Installation Version X.XX (Institutional and Professional) PC-ACE users.**
9. Select the **Submit Request** button.
10. Please note the installation password **NGSMAC1** at the top of the page.
11. Once you have noted the installation password, select the **Download** button to start the download.
12. A message will appear: **'What do you want to do with PC-ACE Setup?'**. Select **Save as.**
13. On the left side of the **'Save As'** 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 As:** dropdown box.
    Note: NGS does **not** support the installation of PC-ACE on a network. The file will begin to download to your desktop.
14. A message will appear: **'Download complete'**—close the download dialogue box and **minimize** your Internet browser in preparation for step 17.
15. 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.
16. Double Click **setup.exe** icon on your desktop, which will open the file.

17. The **Wise Installation Wizard** will begin.
18. Installation code is **NGSMAC1.**
19. At the Welcome window, select **Next.**
20. At the Drive Selection window, select **Next.**
21. At the Start Installation window, select **Next.**
22. Follow the online instructions until **Finish** is selected.
23. To access PC-ACE, select the **PCACE icon** and enter the default user ID **SYSADMIN** and the password **SYSADMIN.**
24. We recommend downloading additional material to assist you with PC-ACE. After the software is successfully downloaded, revisit the EDI Software web page for available documentation.

PC-ACE Part B 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.

Note: These instructions are designed for use with Microsoft's **Edge, Google Chrome or Firefox**. The use of other browsers is not supported by the NGS EDI Help Desk.

1. Open an Internet browser and go to https://www.NGSMedicare.com.
2. Select **Accept** when presented with the Attestation page.
3. On the NGS landing page, select your line of business and state then select Enter.
4. Select **RESOURCES** dropdown at the top of the web page.
5. Select **EDI Solutions.**
6. Select **EDI Software PC-ACE** then **Download PC-ACE** to download the software.
7. On the **PC-ACE Download** form, complete all required fields marked with an asterisk (*).
8. Under **Select Your Download Below**, select the radio button option for **PC-ACE Upgrade (Institutional and Professional) PC-ACE users Version X.XX.**
9. Select **Submit Request** button.
10. Please note the installation password **NGSMAC1** at the top of the web page.
11. Once you have noted the installation code, select the **Download** button to start the download.
12. A message will appear: **Do you want to open or save this file?** Select **Save**
13. 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.
    Note: We **do not** support the installation of PC-ACE on a network.
14. The file will begin to download to your desktop.
15. A message will appear: **Download complete**. Close the download dialogue box and **minimize** your Internet browser in preparation for step 16.
16. Launch **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.
17. Double Click **pcaceup.exe** icon on your desktop.
18. The **Wise Installation Wizard** will begin.
19. Installation code is **NGSMAC1,** (not case sensitive) and select **OK.**

20. 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:
        - Select the **No** button, and then click the **OK** button in the **Update Cancellation Notice** window; the installation wizard will close
        - Launch PC-ACE and, on the main toolbar, select the **System Utilities** button (last button on the right)
        - On the **Backup/Restore** tab, select the **Backup** sub tab
        - 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, then return to step 4
        - If the **Destination Drive or Folder** field is empty, select the small button to the right of that field (has 3 dots on it), browse to the folder you wish to save your backup to and select the **Open** button, then select the **Start Backup** button
        - In the **Confirm** window, select the **OK** button; wait while the backup completes
        - After the backup completes, an **Information** window will appear stating that your backup has completed successfully; select the **OK** button.
        - **Close PC-A**CE and return to step 12.
21. Follow the online instructions until **Finish** is selected.
22. 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 of PC-ACE now that it has been upgraded to the current version (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**.
23. To access PC-ACE, select the **PCACE** icon and enter the default user ID **SYSADMIN** and the password **SYSADMIN**.
24. We recommend downloading additional material to assist you with PC-ACE. After the software has been successfully downloaded, revisit the EDI Software webpage 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).

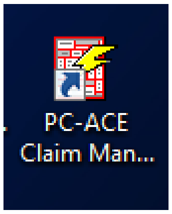


Figure 1

2. Enter "**SYSADMIN**" in the **User ID** and **Password** fields in the **Sign On** box and select **OK** (Figure 2).

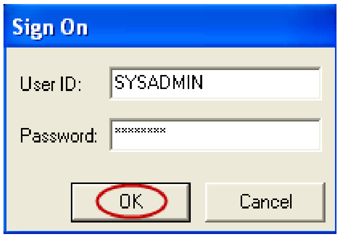


Figure 2

Important: If concerned about controlling User access, the default User's password can be changed under Security and Maintenance. For instructions on changing User access, please use the PC-ACE User's Manual for instructions on setting up individual users. **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).

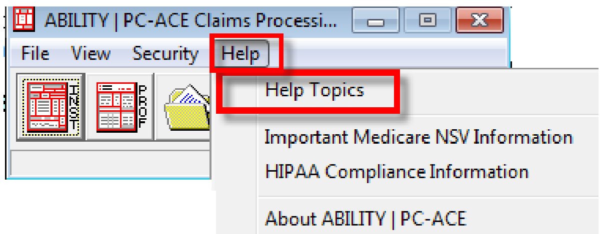


Figure 3

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.

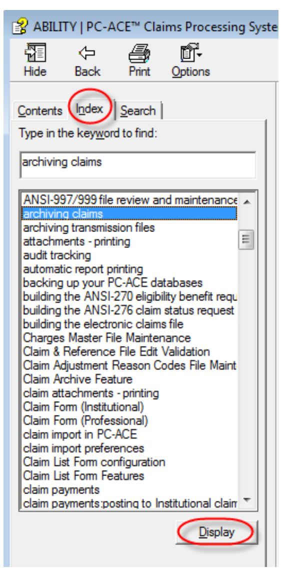


Figure 4

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).

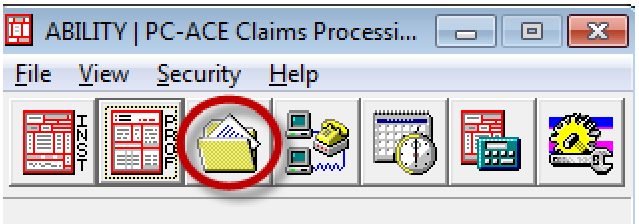


Figure 5

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).

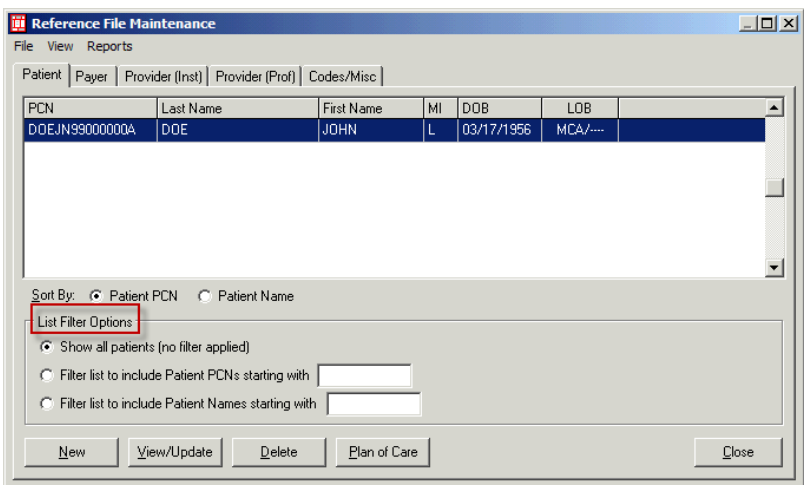


Figure 6

- 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~~ **hover-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).

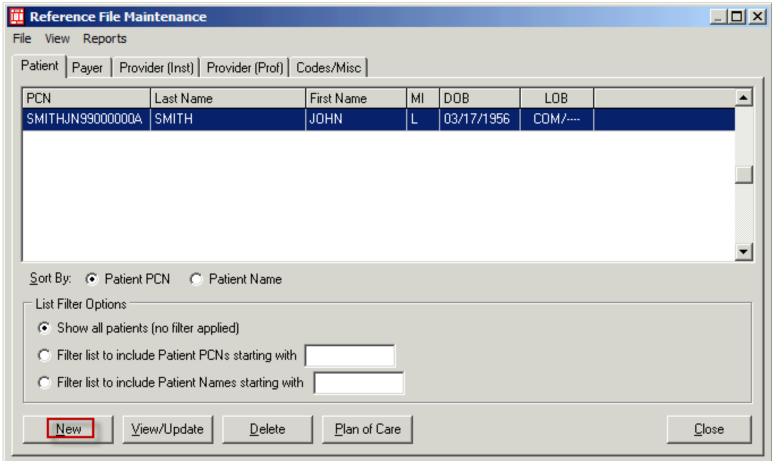


Figure 7

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).

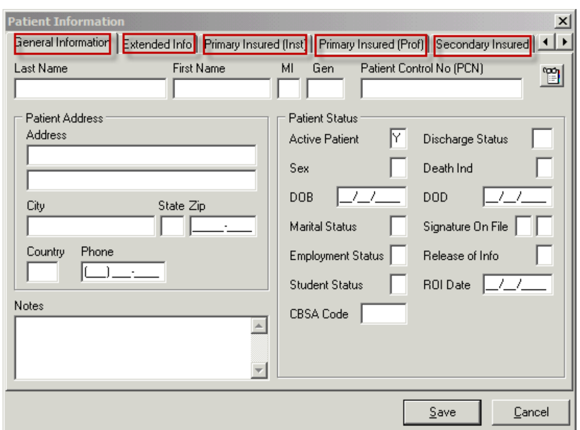


Figure 8

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

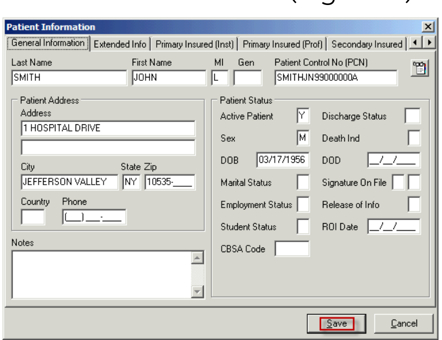


Figure 9

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).

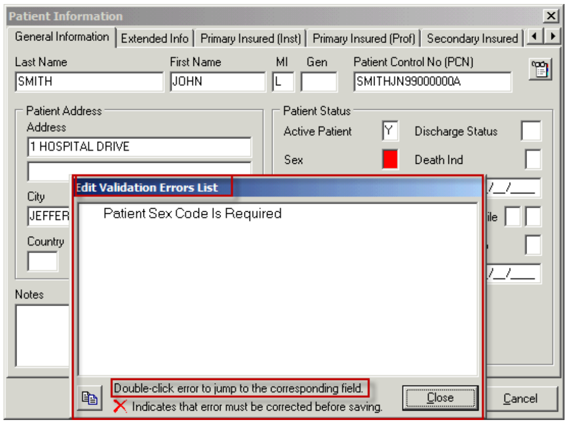


Figure 10

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.

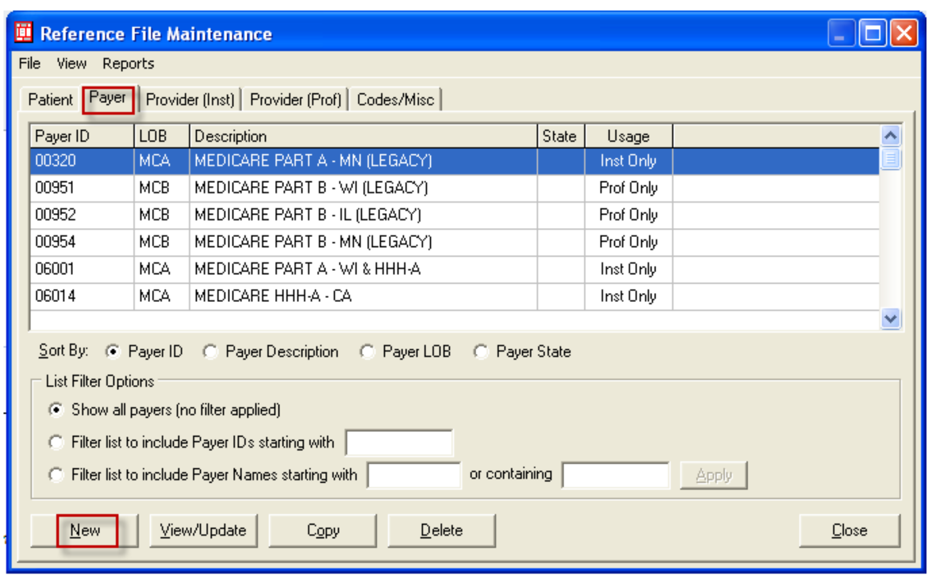


Figure 11

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).

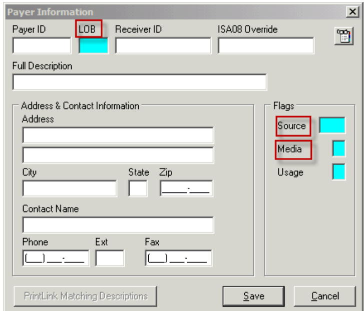


Figure 12

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):

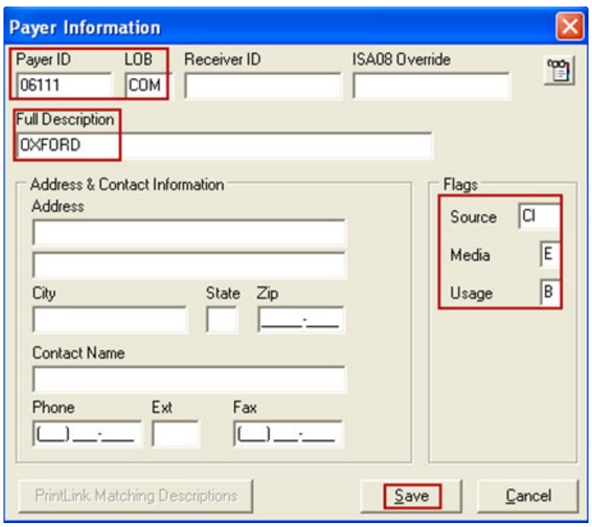


Figure 13

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	**F2** or right click in this field and **select** the **LOB** for the desired Payer
Full Description	Enter the **Company name**
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).

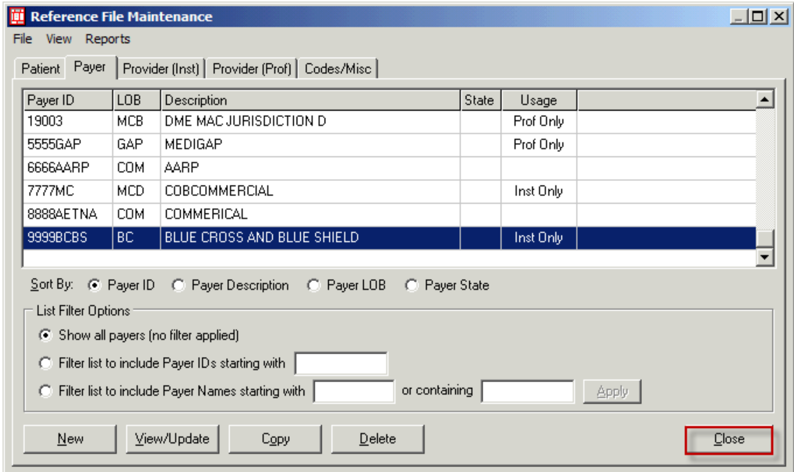


Figure 14

Medicare Solo Provider Setup

To set up an individual provider number electronically, set up must be in a ten-digit format for the NPI.

Note: Instructions for group provider and individual group members set up in the next section.

1. From the **PC-ACE Claims Processing System** main menu select **Reference File Maintenance** (yellow folder) (Figure 15).

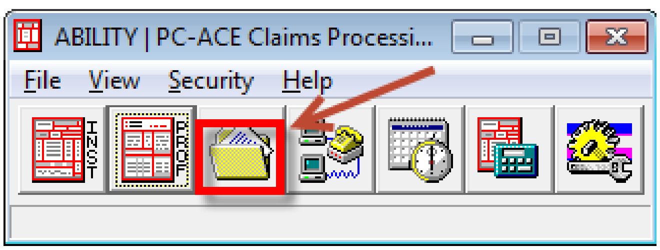


Figure 15

2. Select **Provider (Prof)** tab (Figure 16).

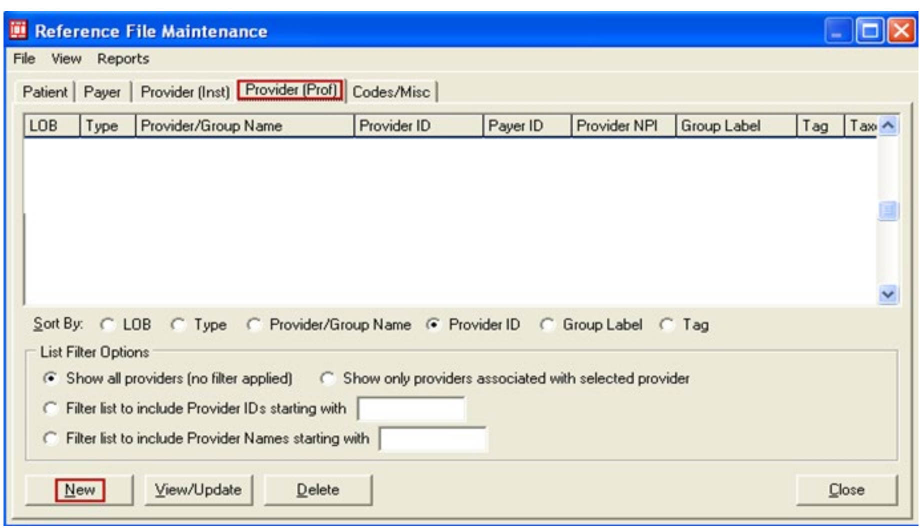


Figure 16

3. Select **New**.
4. Enter the following information: (Figure 17)

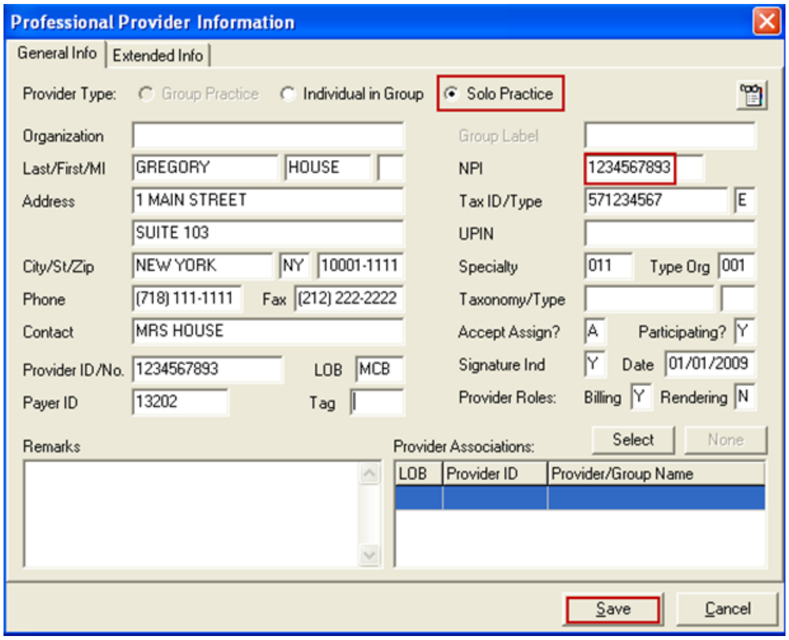


Figure 17

Field Name	Action
Provider Type	Select **Solo Practice** button.
Last/First/MI	Enter practitioner's name.
Address	Enter practitioner's address.
City/St/Zip	Enter practitioner's city, state, and ZIP Code.
Phone	Enter office phone number.
Contact	Enter contact name for office.
Provider ID/No.	Use the ten-digit NPI number.
LOB	Press **<F2>** key to show list, then select **MCB**.
Payer ID	Press **<F2>** key to show list, then select the appropriate payer ID.
NPI	Enter ten-digit NPI number.
Tax ID	Enter Social Security Number (SSN) or Employer Identification Number (EIN)
Type	Enter **"S"** for SSN or **"E"** for EIN.
Specialty	Press **<F2>** key to show list, then select the appropriate specialty.
Type Org	Press **<F2>** key to show list, then select the appropriate Org.
Accept Assign?	Press **<F2>** key to show list, then select the appropriate assign code.
Participating?	Press **<F2>** key to show list, then select **Y** or **N**.
Signature Ind	Press **<F2>** key to show list, then select **Y** or **N**.
Signature Date	Enter EDI agreement was signed for electronic billing.

5. Select the Extended Info tab (Figure 18)

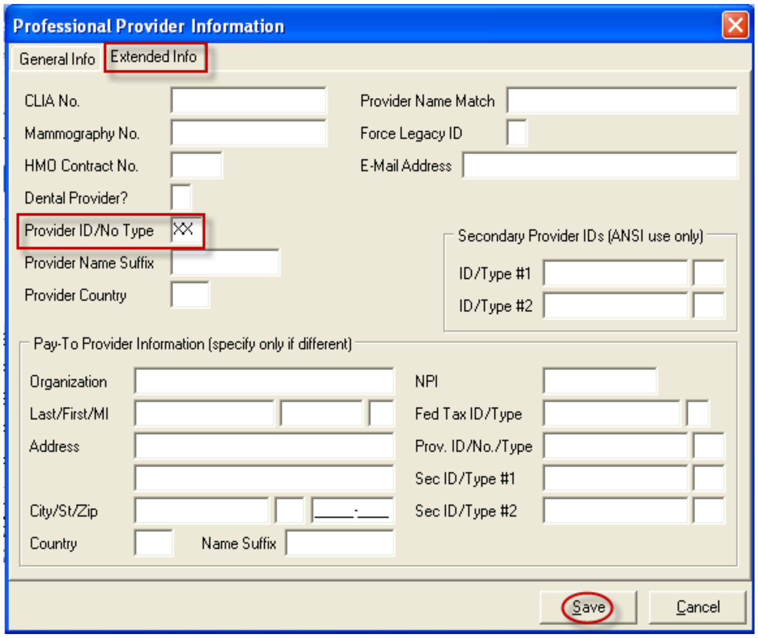


Figure 18

6. Select **Close** to exit the **Reference File Maintenance** box (Figure 19).

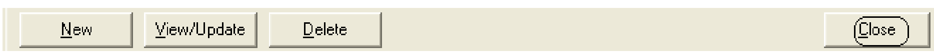


Figure 19

Group Record Setup for Medicare

1. Select **Reference File Maintenance** (yellow folder) from the **PC-ACE Claims Processing System** main menu. (Figure 20).

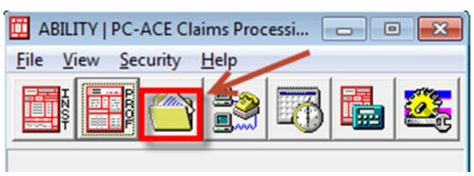


Figure 20

2. Select the **Provider (Prof)** tab (Figure 21).
3. Select **New**.

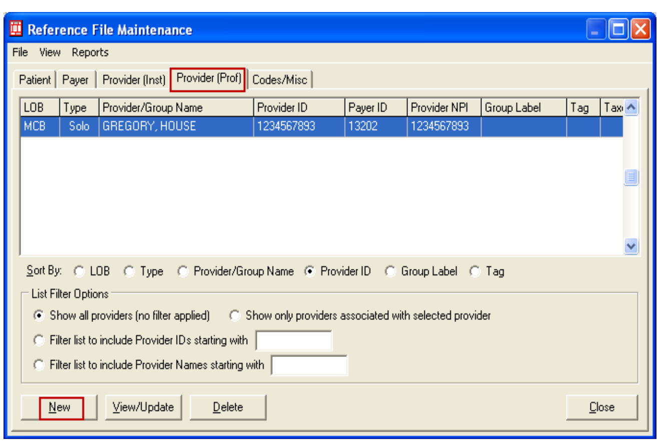


Figure 21

4. New Provider Options box appears with Create a completely new provider (all fields blank) button selected.
5. Select OK (Figure 22).

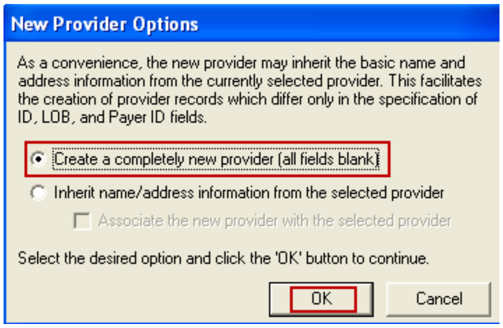


Figure 22

6. Enter the following information (Figure 23).

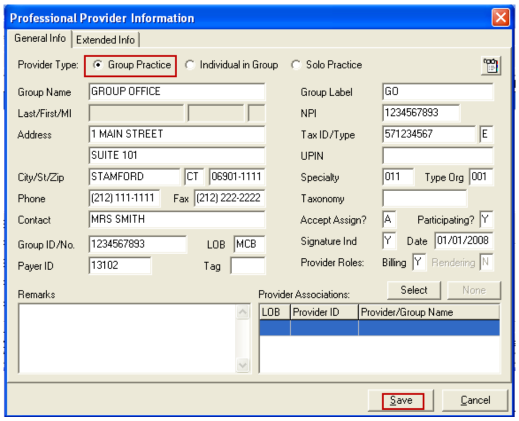


Figure 23

Field Name	Action
Provider Type	Select **Group Practice** button.
Group Name	Enter group name.
Address	Enter group service location.
City/St/Zip	Enter group city, state, and ZIP Code.
Phone	Enter office phone number.
Fax	Optional field
Contact	Enter office contact name.
Group ID/No.	Enter ten-digit group NPI number.
LOB	Press **<F2>** key to show list, then and select **MCB**.
Payer ID	Press **<F2>** key to show list, then select the appropriate payer ID.
Group Label	Enter an abbreviation of choice to link the group to individual records. **Note:** The group label is very important. A user-assigned identifier that is used to link the group and individuals within the group (e.g., **"AMD"** for American Medical Doctors) group label is assigned by the provider.
NPI	Enter the group NPI number.
Tax ID/Type	Enter tax identification number and **"E"** for tax ID.
Specialty	Press **<F2>** key to show list, then select appropriate specialty.
Type Org	Press **<F2>** key to show list, then select appropriate Org
Accept Assign?	Press **<F2>** key to show list, then select appropriate assign code.

Field Name	Action
Participating?	Press **<F2>** key to show list, then select **Y** or **N**
Signature Ind	Press **<F2>** key to show list, then select **Y** or **N**
Signature Date	Enter date EDI agreement was signed for electronic billing.

7. Select the **Extended Info** tab (Figure 24).
8. Enter **CLIA No./Mammography No.** if appropriate.
9. Enter **"XX"** for the NPI in the **Provider ID/No Type** field.
10. Select **Save**.

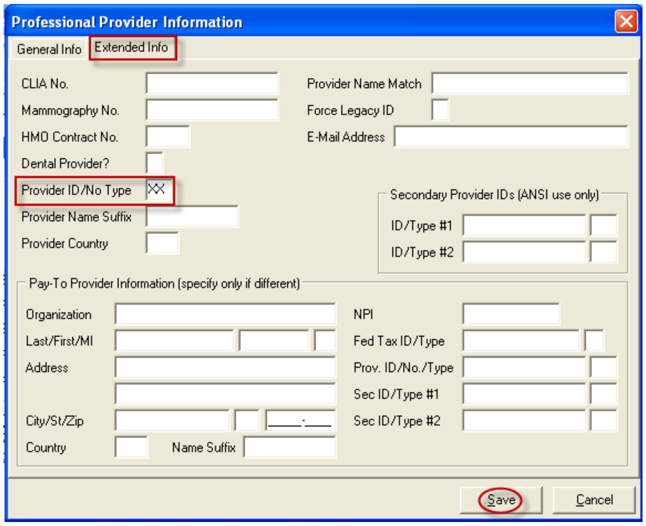


Figure 24

Individual Group Member Record Setup for Medicare

1. Highlight group record and select **New** (Figure 25).
2. Select **Inherit name/address information from the selected provider**
3. Select **OK**

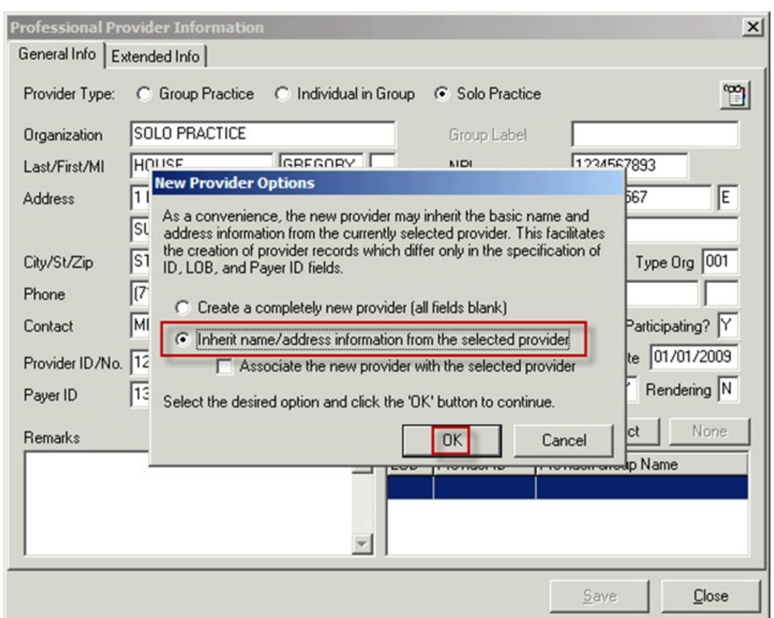


Figure 25

4. Change Group Practice to 'Individual in Group' (Figure 26).

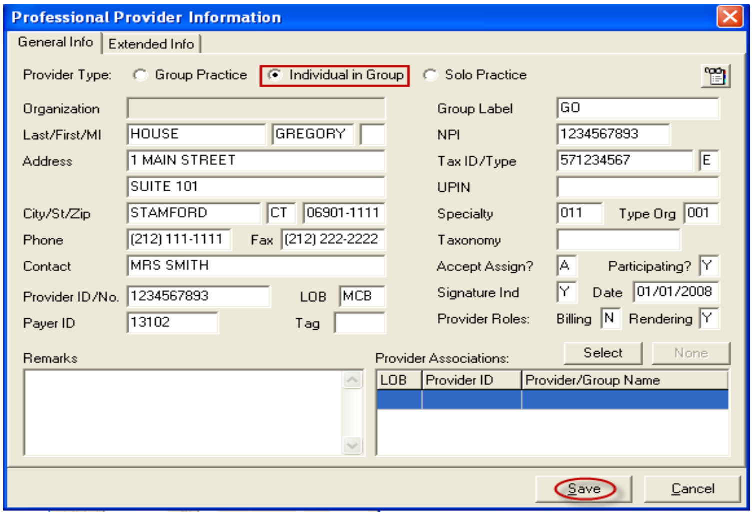


Figure 26

Field Name	Action
Provider Type	Select **Individual in Group** button.
Last/First/MI	Enter name of provider.
Provider ID/No.	Remove group NPI and enter ten-digit NPI number of individual.
LOB	Press **<F2>** key to show list, then select MCB.
Payer ID	Press **<F2>** key to show list, then select appropriate payer ID.
Group Label	Press **<F2>** key to show the Provider/Group Selection list, click on the Group Record and click **Select**.
NPI	Remove the group NPI, and enter the individual NPI number.
Specialty	Press **<F2>** key to show list, then select the appropriate specialty ID.

5. Select the **Extended Info** tab (Figure 27).
6. Enter **CLIA No./Mammography No**. if appropriate.
7. Enter "XX" for the NPI in the **Provider ID/No Type** field.
8. Select **Save**.
9. Select **Close** to exit the **Reference File Maintenance**.

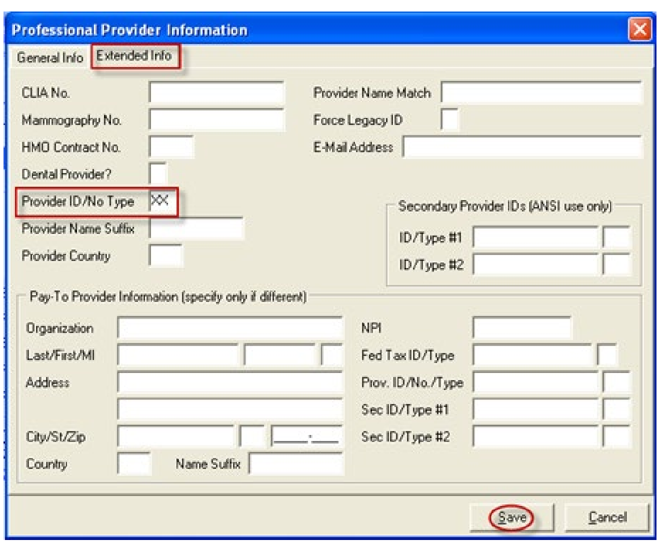


Figure 27

Submitter Setup

1. Select the tab marked **Codes/Misc** (Figure 28).
2. Select **SUBMITTER**.

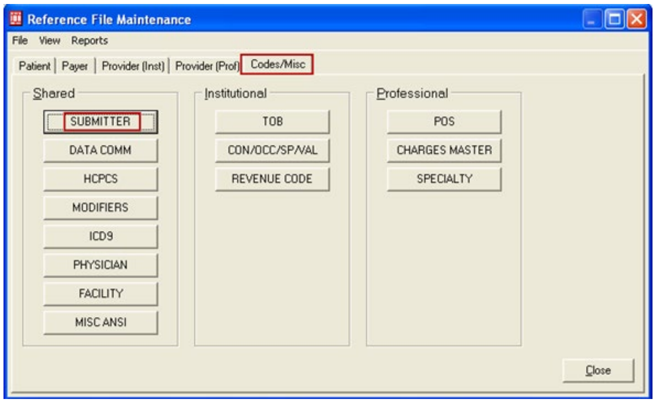


Figure 28

3. The radio button defaults to Institutional. Select **Professional** and **Select View/Update** with the submitter record highlighted (Figure 29).

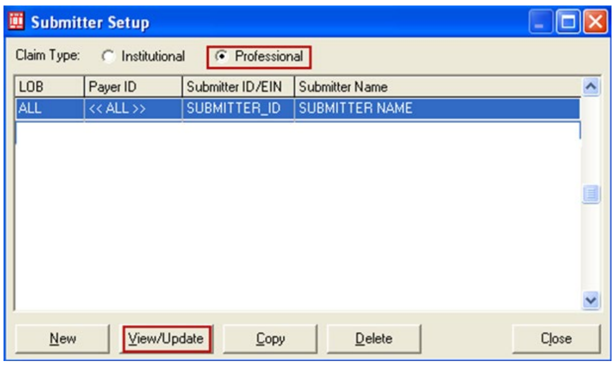


Figure 29

General Tab

4. Enter submitter number (e.g., NYBXXXX, CHXXXXXXX) in the **ID** field (Figure 30).
5. Enter name and address of submitter.
6. Enter phone number and contact.
7. Select **Save**.

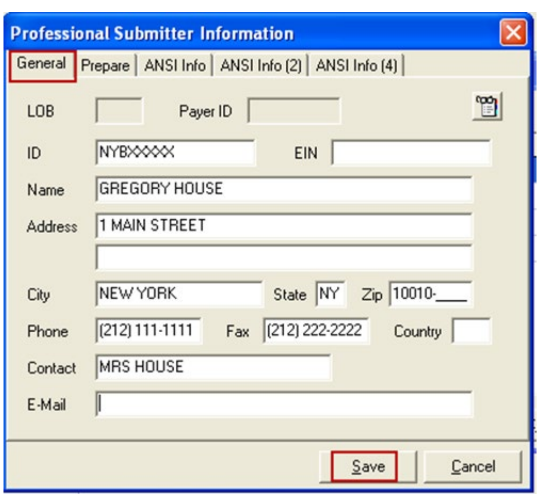


Figure 30

Referring Physician Setup

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

1. Select **SUBMITTER** on the **Provider (Prof)** tab (Figure 31).

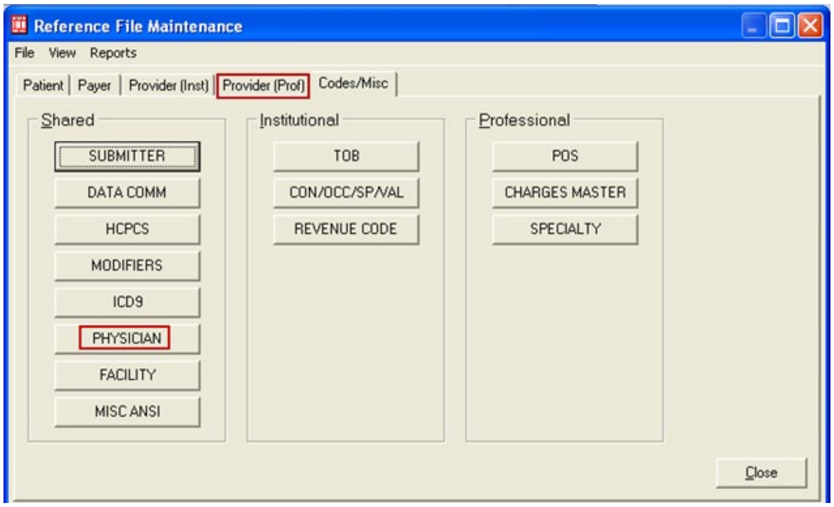


Figure 31

2. Select **New** (found on bottom left of screen) (Figure 32).

Figure 32

3. Enter physician's last name, first name, and middle initial (Figure 33).
4. Enter physician's NPI number.
5. Select **Save**.

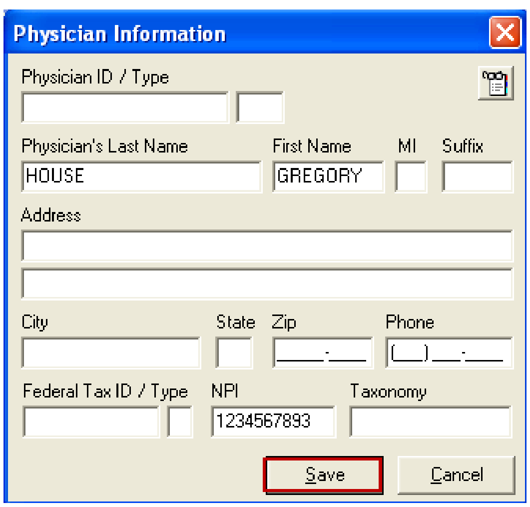


Figure 33

6. Select **Close** to exit **Physician Information** box (Figure 34).

Figure 34

Facility Setup

A facility record must be created for all places of service other than home and office. If a modifier QU is utilized for a health professional shortage area (HPSA) location or if there is a second provider location within the same pricing jurisdiction, a facility record will need to be created.

1. Select **FACILITY** (Figure 35).

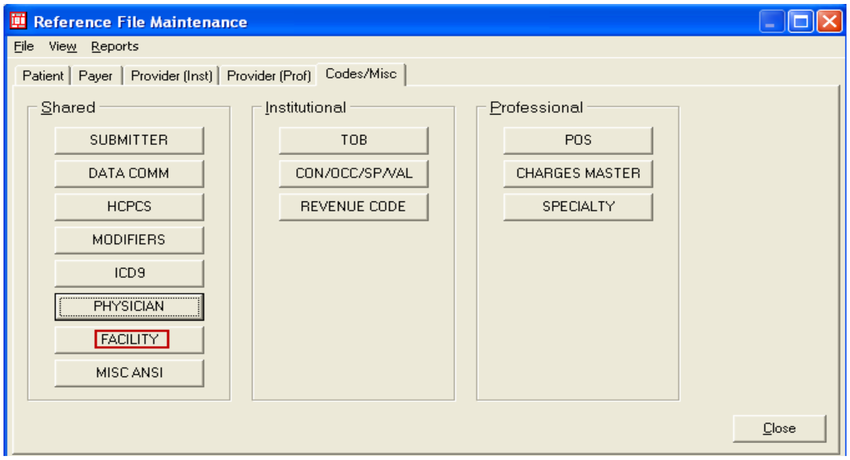


Figure 35

2. Select **New** (Figure 36).

Figure 36

3. Enter in the following fields:
   - Facility Name
   - Address
   - City/St/Zip
   - NPI number for facility (only needed for purchased services and laboratory)
4. Select **Save**. (Figure 37)

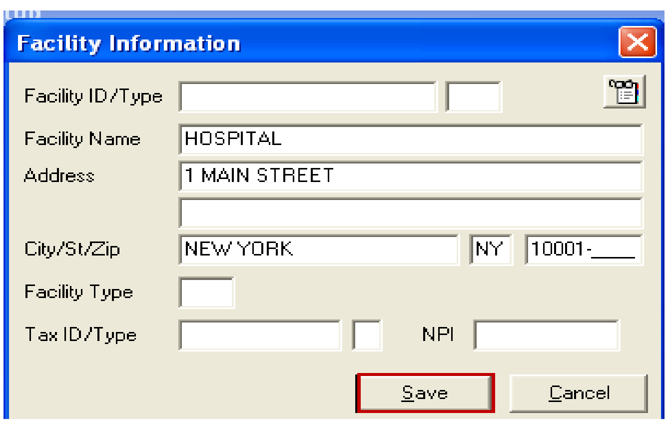


Figure 37

5. Select **Close** to exit the **Facility Information** box (Figure 38).

Figure 38

Charges Master Setup (Optional)

To have charges automatically populate in charge field, the charges master must be set up.

1. Select **CHARGES MASTER** (Figure 39).

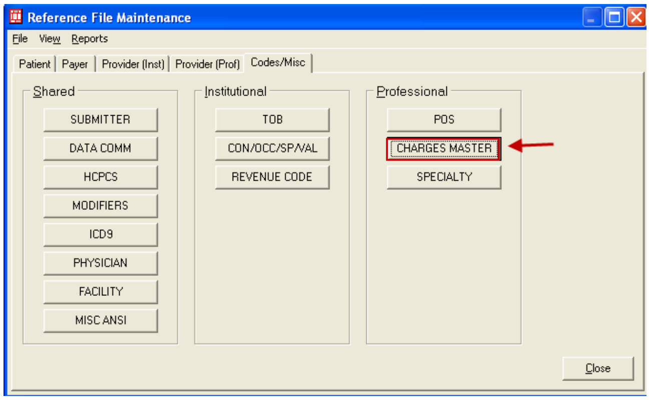


Figure 39

2. Select New (Figure 40).

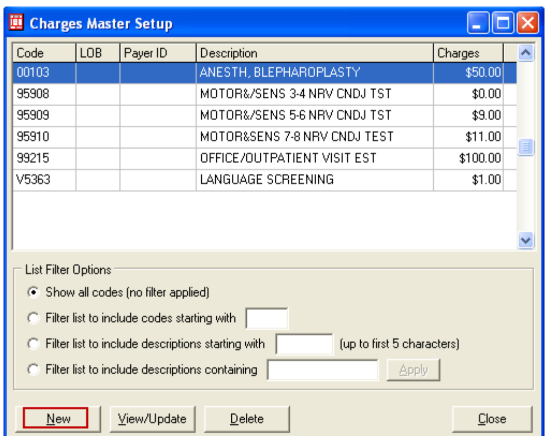


Figure 40

Charges Master Information

1. Fill in the following: (Figure 41)
   - Enter procedure code in **Code** field. Description will automatically populate after entering procedure code.
   - Enter money amount in **Charges** field.
2. Select **OK**.

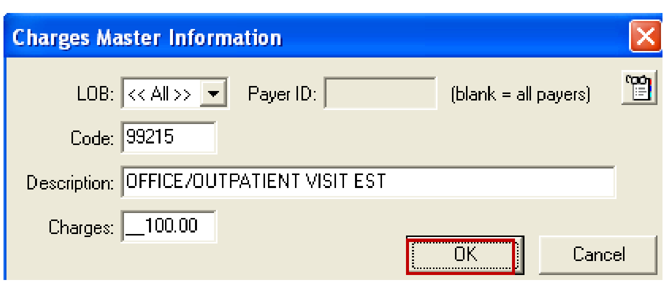


Figure 41

Repeat the above steps for each code to be entered.

3. Select **Close** to close the **Charges Master Information** box (Figure 42).

Figure 42

4. Select **Close** to exit from the **Reference File Maintenance** box (Figure 43).

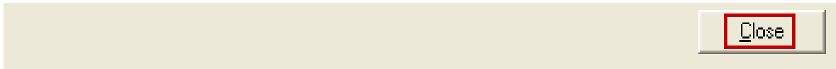


Figure 43

To activate the Charges Master list do the following:

1. From the **PC-ACE Claims Processing System** main menu, select **File** (Figure 44).

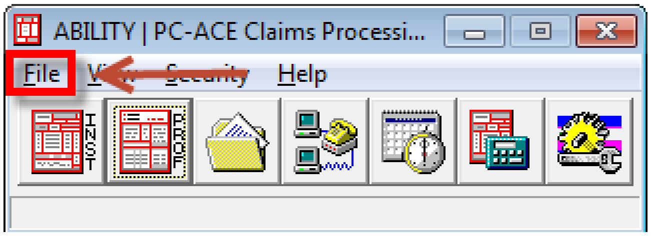


Figure 44

2. Select **Preferences** (Figure 45).

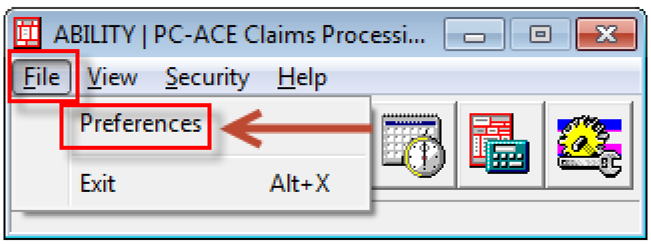


Figure 45

3. Under the **General** tab, select **Use Charge Master Reference files for Professional procedure code lookups** (Figure 46).
4. Select **OK**.

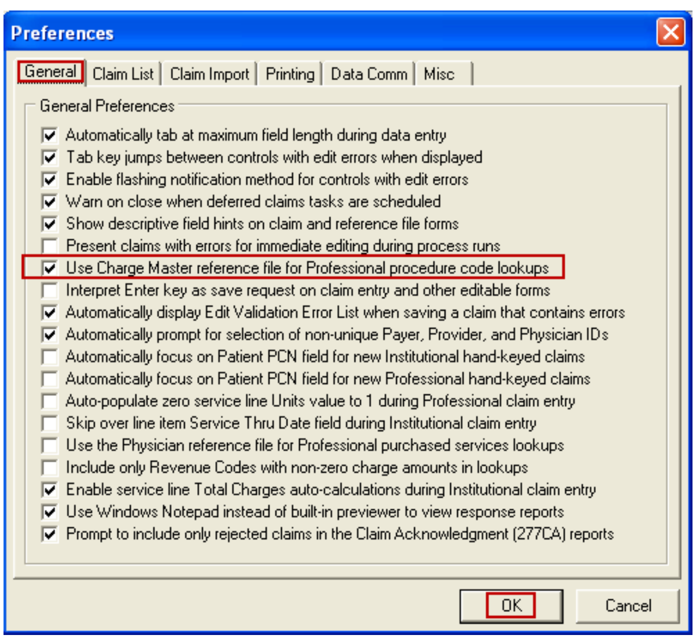


Figure 46

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 **PROF** icon from the **PC-ACE Claims Processing System** main menu (Figure

47).

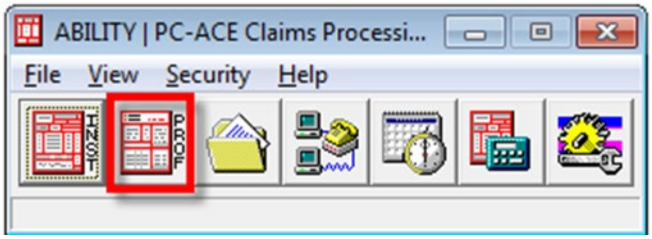


Figure 47

2. Enter **SYSADMIN** as both the User ID and Password in the **Sign On** box if it appears (Figure 48).
3. Select **OK.**

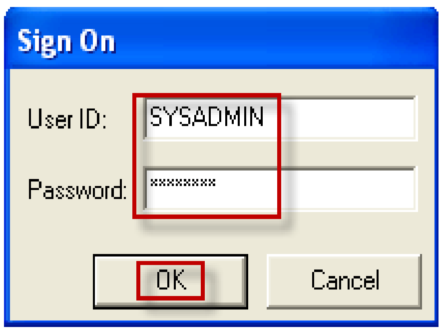


Figure 48

4. Select **Enter Claims** to open the Professional Claim Form (Figure 49).

Figure 49

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 a Professional claim and the software will display the **Professional 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 three 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 50).

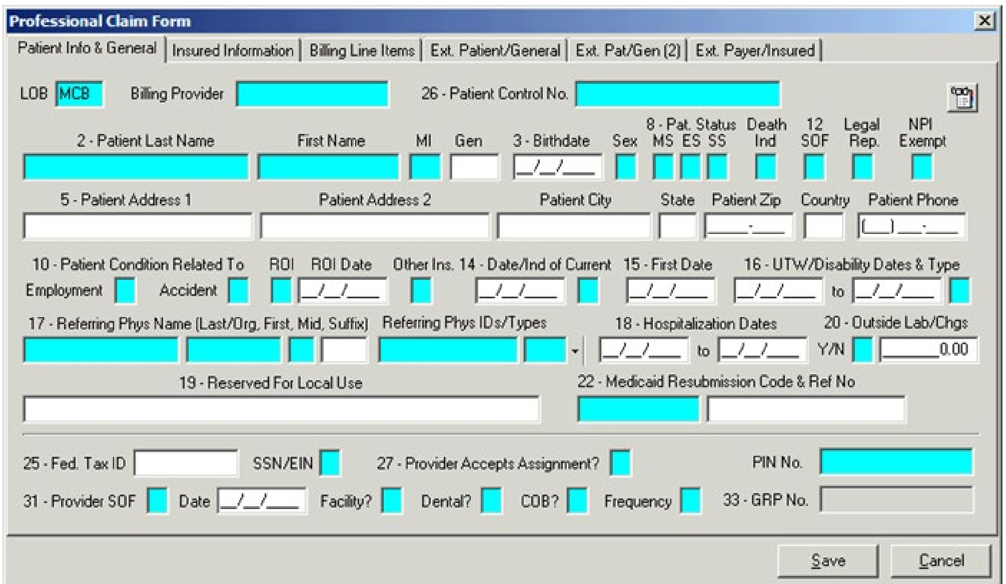


Figure 50

- **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.
- Right click in the Patient Control No. field (Figure 51).

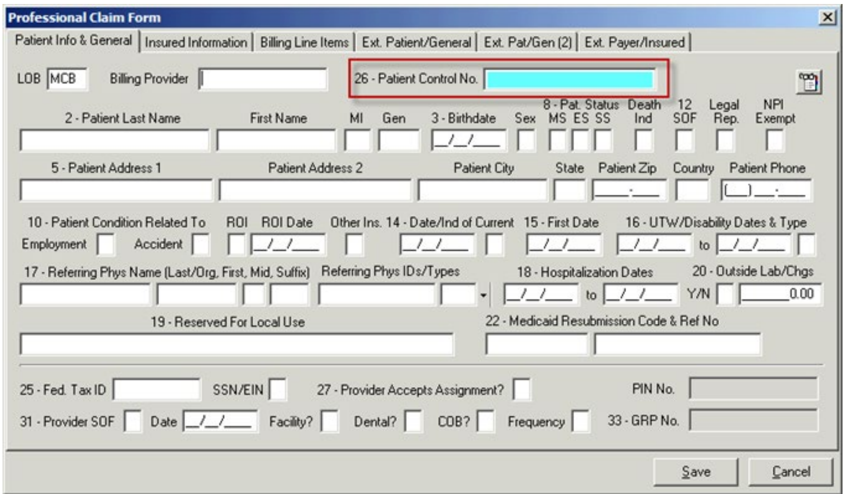


Figure 51

- Then select the patient that will be entered on the claim form (Figure 52) from the reference file Patient Selection to auto-populate the values from the Patient Selection record into the claim form (Figure 53).

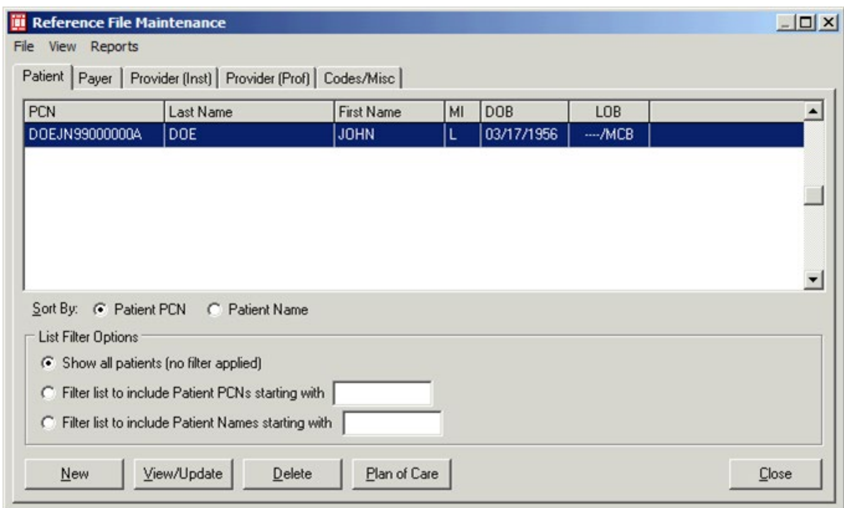


Figure 52

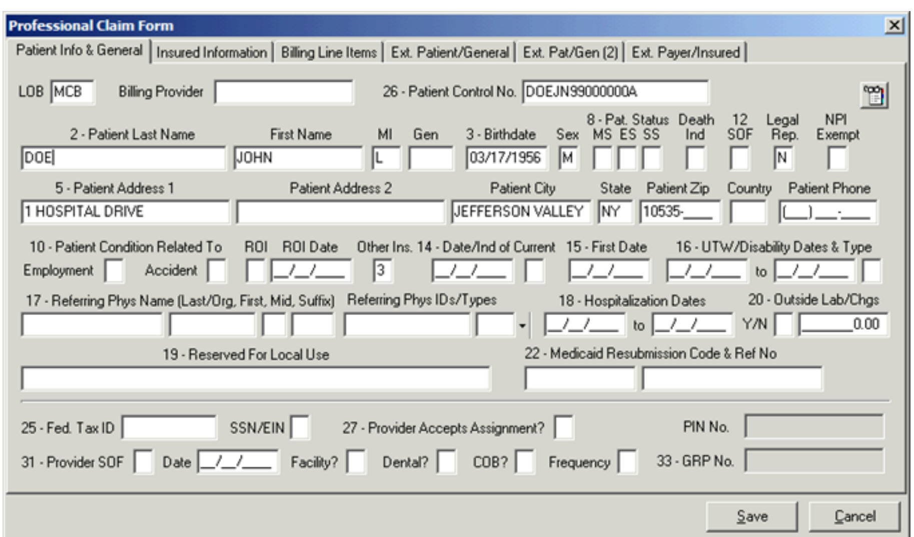


Figure 53

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 some of the claim form fields.

Enter the appropriate information required for the Professional 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 Professional claim form (Figure 54).

The Professional claim form contains six sections (tabs):

- Patient Info &General
- Insured Information
- Billing Line Items
- Extended Patient/General
- Extended Patient/General (2)
- Extended Payer/Insured

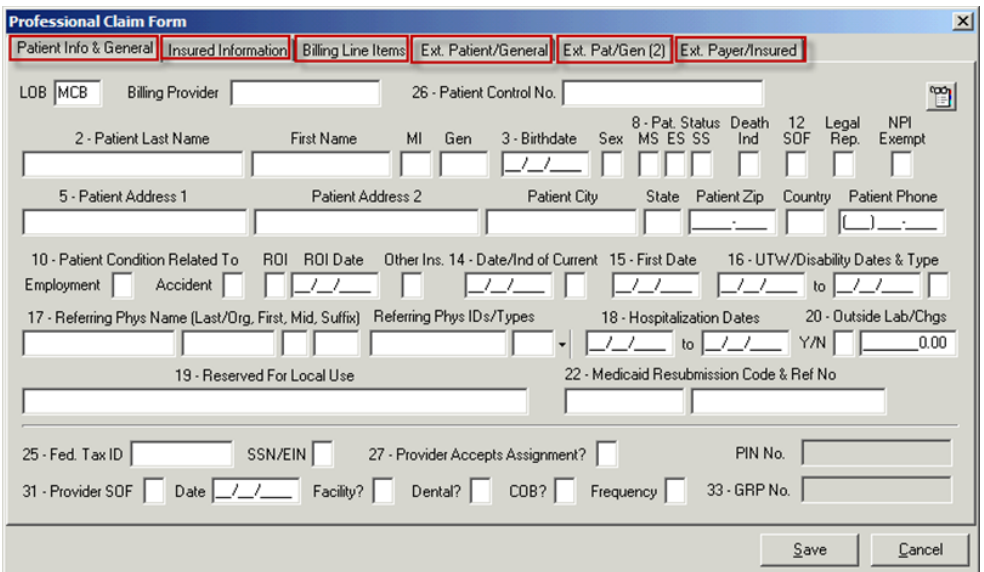


Figure 54

- Patient Info &General Tab
  This tab includes fields for general claim and patient information.

  1. While the cursor is displayed in the Billing Provider field, press the <F2> key to show list, then select the appropriate provider (Figure 55).

     If part of a Group, the Billing Provider field should always be populated with the Group.

     If a Solo Practitioner, select the Solo record (Figure 56).

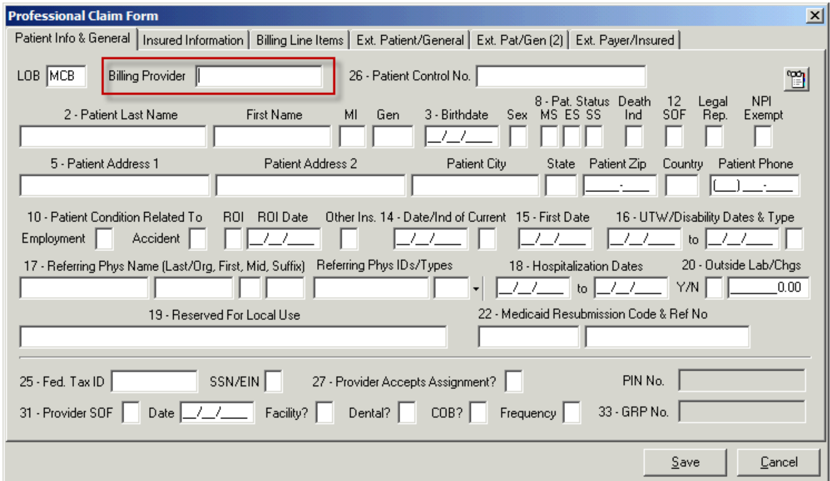


Figure 55

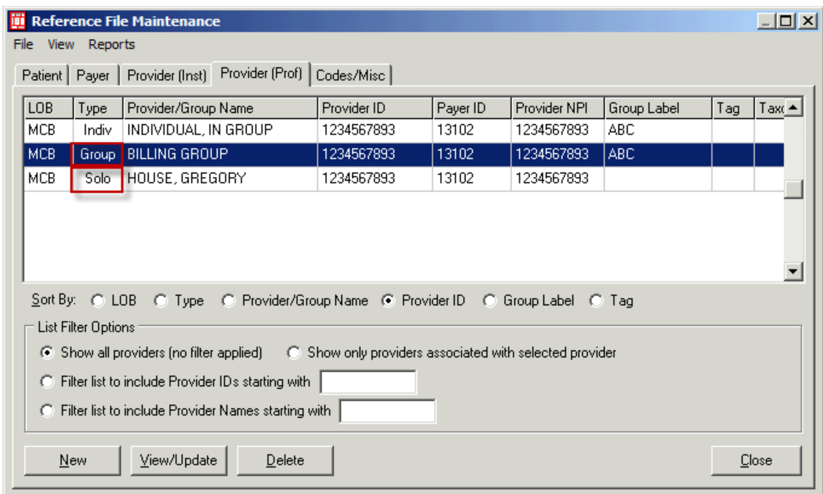


Figure 56

2. Enter the patient information manually during claim entry *or* while the cursor is displayed in **Form Locator 26 – Patient Control Number**, press <**F2**> or **right click** to access a list of patients from which to select in reference file maintenance record (Figure 57).

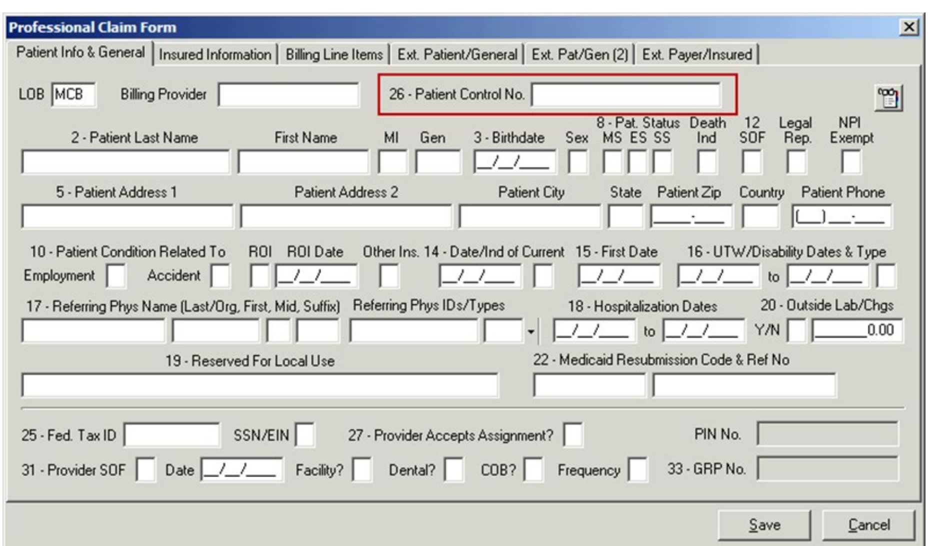


Figure 57

a. Once the patient is highlighted, click **SELECT** (Figure 58). The **Patient Info &**

General 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 & General** tab.

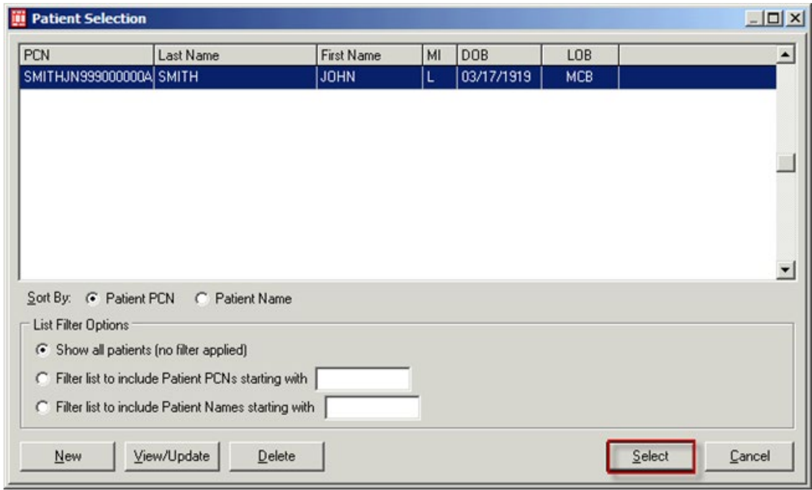


Figure 58

b. If the patient is not in the Patient Selection select New (Figure 59).

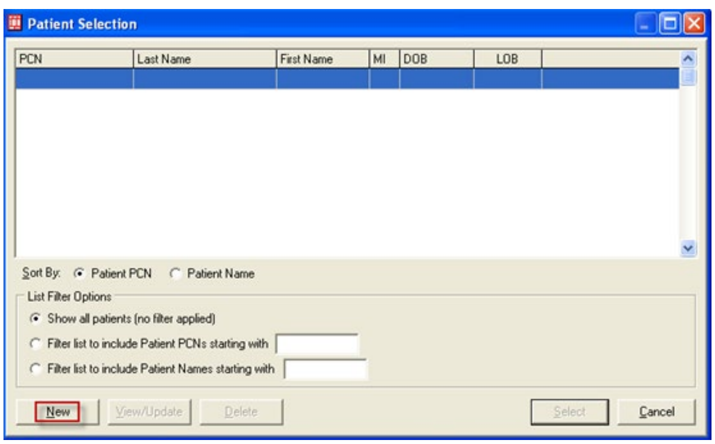


Figure 59

c. Enter in the following fields: (Figure 60)

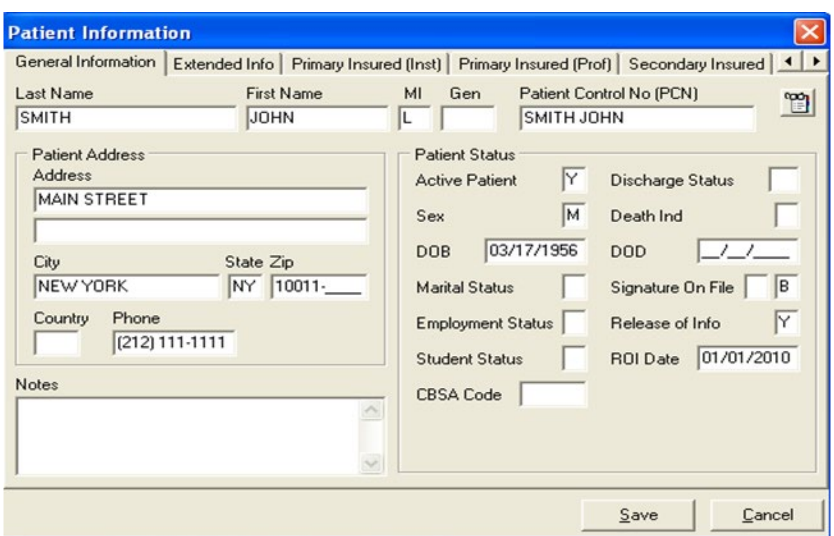


Figure 60

Field Name	Action
Last Name/First Name/MI	Enter patient's name.

Patient Control No (PCN)	Enter patient's last name, space, first name Or if preferred use a numbering system.
Address	Enter patient's address.
City/State/Zip	Enter city, state, and ZIP Code.
Phone	Optional
Sex	Enter "**M**" for male or "**F**" for female.
DOB (date of birth)	Enter the date in the MM/DD/CCYY format.
SOF (signature on file)	Press **<F2>** key to show list, then select the appropriate code.
Release of Info (ROI)	Press **<F2>** key to show list, then select the appropriate code.
ROI Date	Enter date released signed or earliest date billing was made on this claim.

Note: Do not select **Save.**

Select the **Primary Insured (Prof)** tab (Figure 61).

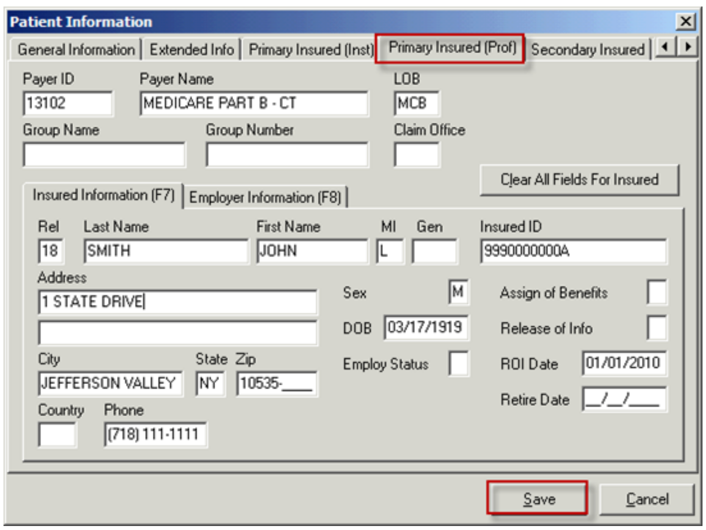


Figure 61

d. Enter the following information: (Figure 62)

Field Name	Action
Payer ID	Press **<F2>** key to show list, then select the appropriate payer.
Rel (relationship to insured)	Enter "**18**" for self. Enter "**01**" for spouse. Enter "**19**" for child.
Insured ID	Enter Medicare Health Insurance or subscriber number.
Assignment of Benefits	Enter "**Y**" for yes or "**N**" for no.

e. Select **Save**.

3. The **Professional Claim Form** box will appear (Figure 62).
4. In box 10 enter "**N**" for condition related to employment and "**N**" for condition related to an accident.
5. In box 20 enter "**N**" for outside lab charges not included in claim or "**Y**" for outside lab charges included in claim.
6. If billing for a place of service other than home, office, enter a "**Y**" in the **Facility?** field.

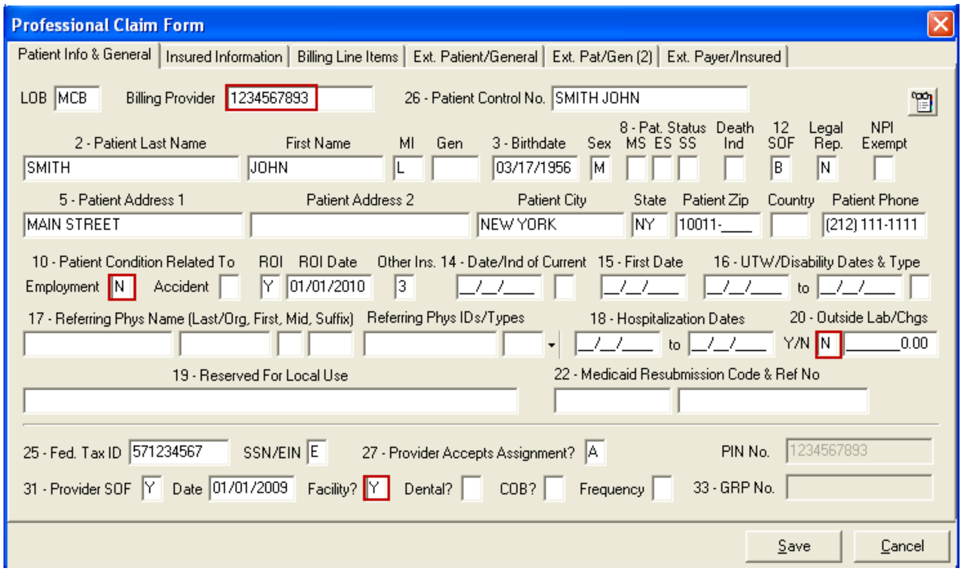


Figure 62

7. When the **Facility Information** box appears on the **Ext. Patient/General** tab, press the **<F2>** key for the facility information (Figure 63).
8. Select the facility.

Note: Additional facilities may be added by selecting **New**, then adding the facility data, and then selecting **Save**.

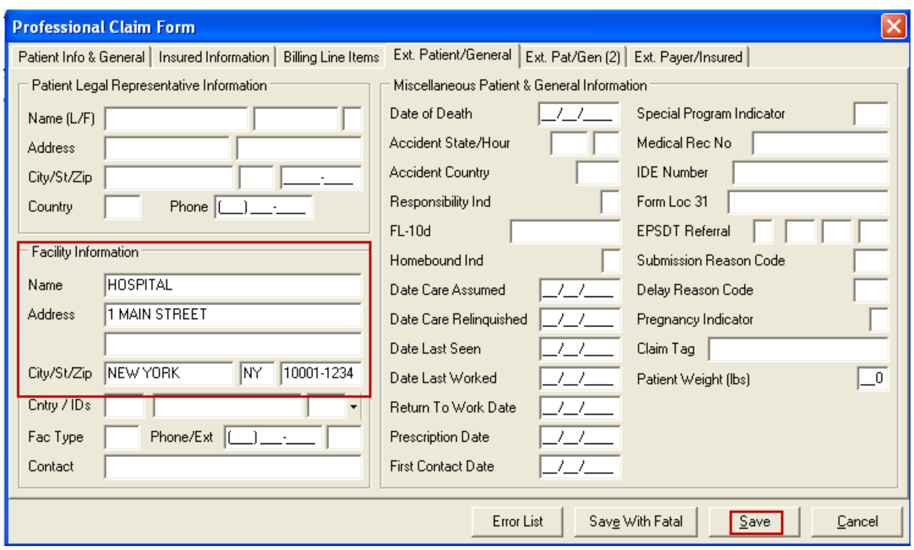


Figure 63

- **Billing Line Items Tab**
  Enter the services/supplies rendered to the patient. Six 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 64).

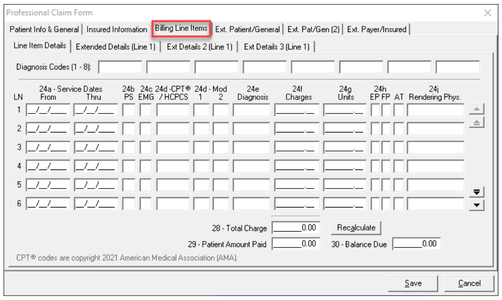


Figure 64

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 Medicare Secondary Payer (MSP) Reference Guide.

- **Line Item Scrolling** - The Billing Line Items tab displays 6 claim lines at a time. For claims that contain more than 6 line items, the user may scroll through the claim line items one line at a time or one page (i.e., 6 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.

  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 jump to the Ext Details 3 (line X). Enter the desired narrative text and press the "**<TAB>**" key to return to the original line field.

1. **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" field from the current claim line item charges values. Select the **Billing Line Items** tab (Figure 65).

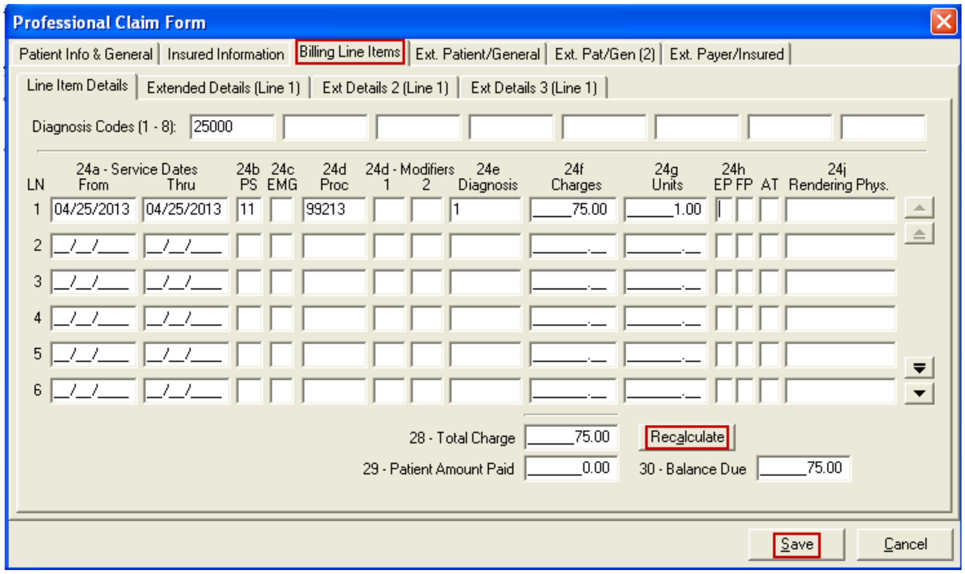


Figure 65

2. Enter the following information: (Figure 65)

Field Name	Action
Claim Diagnosis Codes	Enter up to four diagnosis codes.
Service Dates	Enter dates of service.
PS (place of service)	Press the **<F2>** key to show list, then select the appropriate value.
EMG (Emergency)	Leave field blank.
Proc (procedure code)	Enter procedure code.
Modifiers	If necessary, press the **<F2>** key to show list for appropriate values, then select modifier.
Diagnosis	Enter values 1–4.
Charges	Enter charge. **Note:** When entering a charge that includes cents, a decimal point is required (e.g., $12.01, $25.24).
Units	Only enter field if more than one unit.
Rendering Phys.	If billing in a group, press the **<F2>** key to show list of rendering providers of service.

3. Select **Recalculate** (Figure 65).
4. Select **Save** when finished entering the claim.
5. 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 Professional claim form will appear allowing entry of another claim.
6. 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.
7. Once finished entering claims, the claims are now ready to be prepared for transmission (Figure 66). See **Prepare Claims Function**.

   Note: Use the Help Feature in PC-ACE for more information on “Listing, modifying and maintaining claims.”

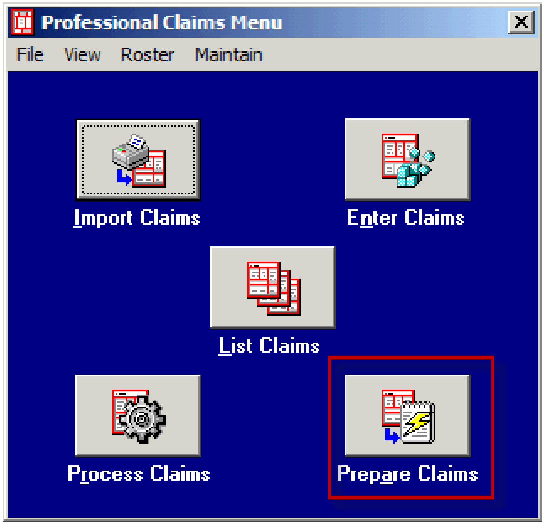


Figure 66

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 **Professional Claims Menu** window, select **List Claims**.
2. In the **Professional 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 **Professional Claim Form** will be displayed instead of the **Professional 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 **Save**.

Reactivating Individual Previously Transmitted 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 **Professional** icon from the **PC-ACE Claims Processing System** main menu (Figure 67).

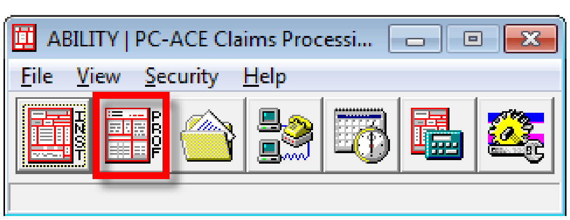


Figure 67

2. Select **List Claims** (Figure 68).

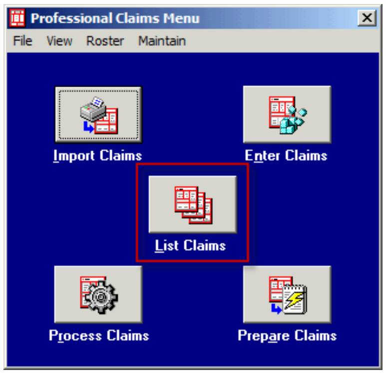


Figure 68

3. Select **Location** (Figure 69).
4. Select **CL** (to be transmitted) or **TR** (transmitted only).

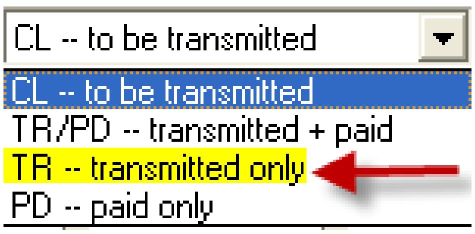


Figure 69

5. Check one claim or several claims to be reactivated.
6. Select **Actions** (Figure 70).
7. Select either **Reactivated Claim** (if only one claim) or **Reactivate All Checked Claims** (for more than one claim).

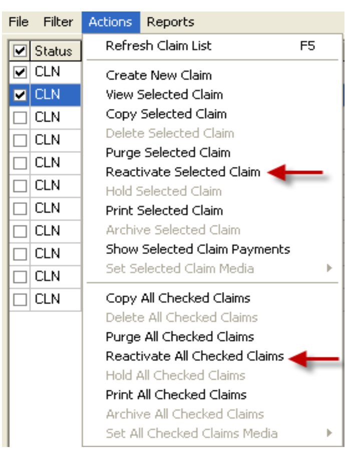


Figure 70

8. The **Confirm** box appears (Figure 71).
9. Select **OK** to reactivate claim/claims.

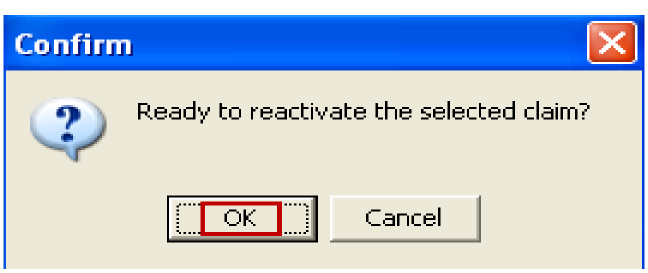


Figure 71

10. Change **Location** field to **CL–to be transmitted** (Figure 72).

Figure 72

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 73), or see the **Processing Reactivated or Imported Claims** section to Process a multitude of claims.

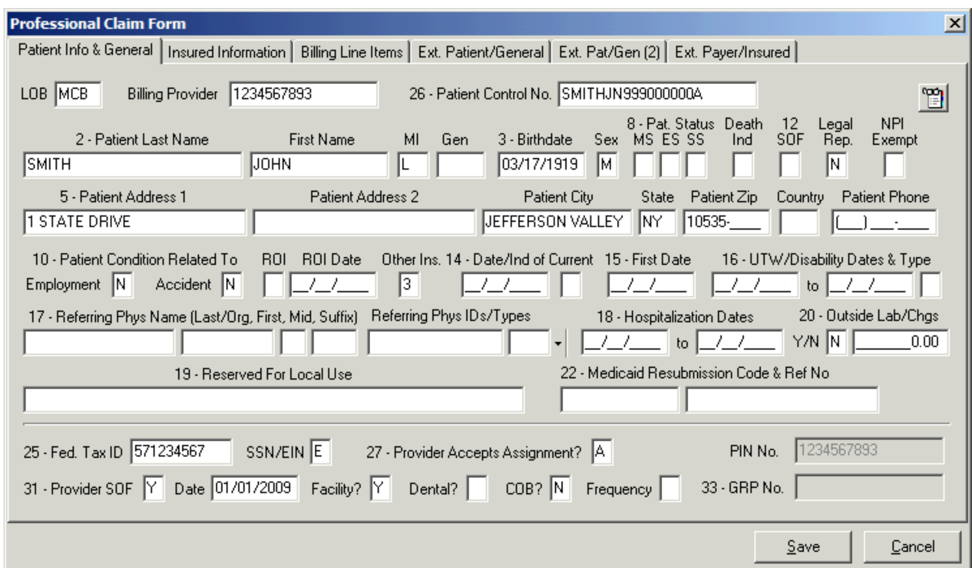


Figure 73

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 claim import section in the user manual.

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

Providers can translate and import claims files in the ANSI 837 version format, for subsequent editing, ANSI 837 formatting and transmission. The ANSI 837 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 837 files have already been validated as structurally sound and complete. It **should not** be used as an ANSI 837 testing validation tool.

Note: Only those data elements supported in PC-ACE will be imported from the ANSI 837 file. Any unsupported segments and data elements present in the imported ANSI 837 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 74).

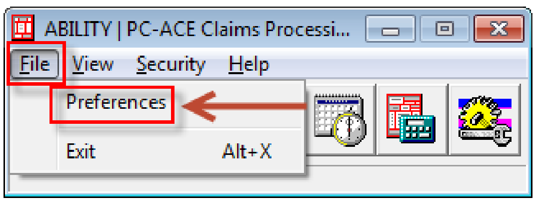


Figure 74

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 Professional ANSI 837 claim import function** option.
4. Select **OK** to save the changes. These new settings will take effect immediately. (Figure 75)

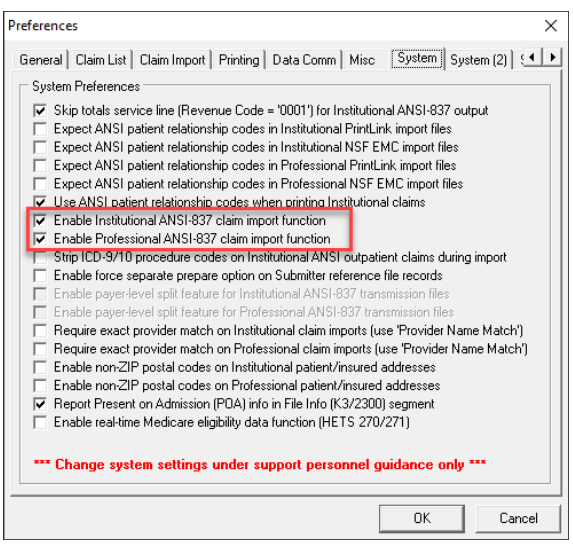


Figure 75

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 *dot* DAT (.DAT) file extension and copy them into the C:\WINPCACE\IMP1500 directory (Figure 76).

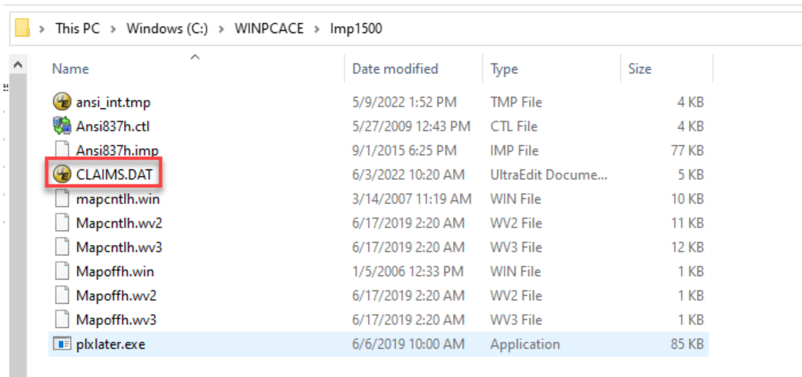


Figure 76

7. On the main toolbar select the **Professional Claims Processing Menu** icon (Figure 77).

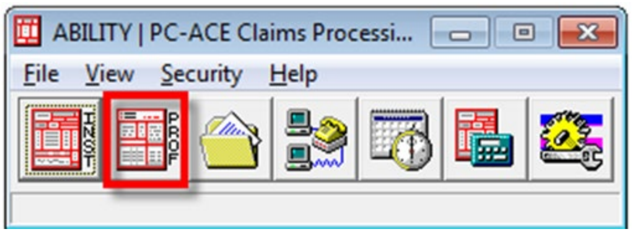


Figure 77

8. Select the **Import Claims** button (Figure 78).

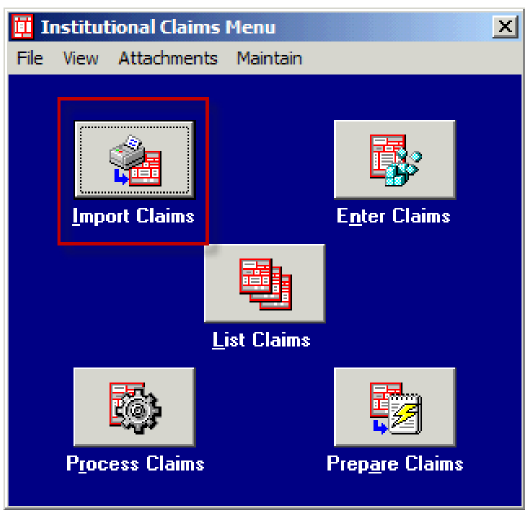


Figure 78

9. The **Professional Claim Import** window will appear. Select **Import** (Figure 79).

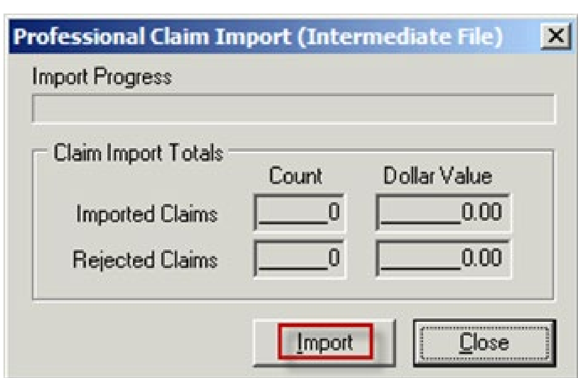


Figure 79

10. A **Confirm** window will be displayed. Select **OK** to continue (Figure 80).

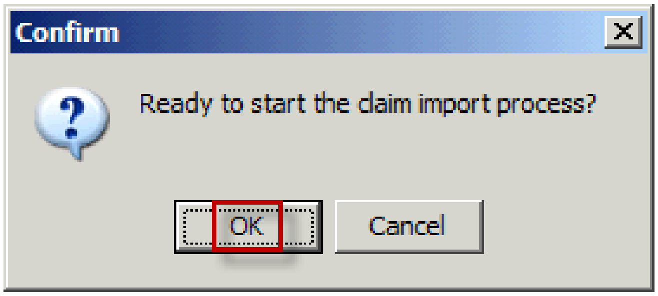


Figure 80

11. When the import process is complete an **Information** window will be displayed to indicate that the operation was completed successfully. Select **OK** (Figure 81).

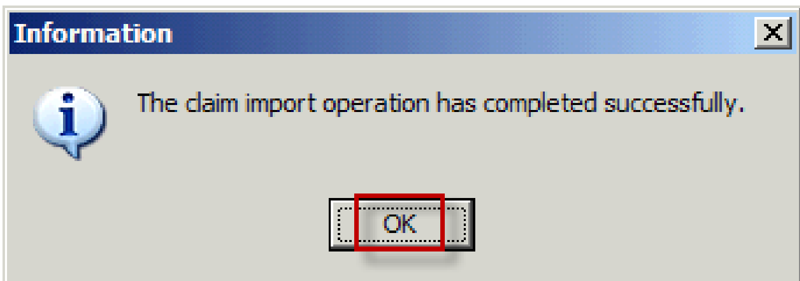


Figure 81

12. The **Professional 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 **View Results** button to view the report (Figure 82).

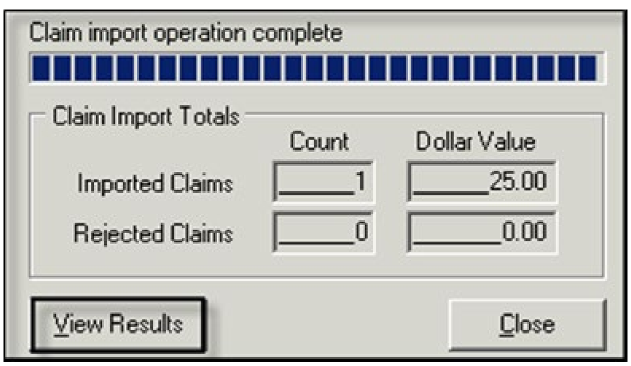


Figure 82

14. The **PC-ACE Claim Import Detail Report** will appear in display mode (Figure 83).

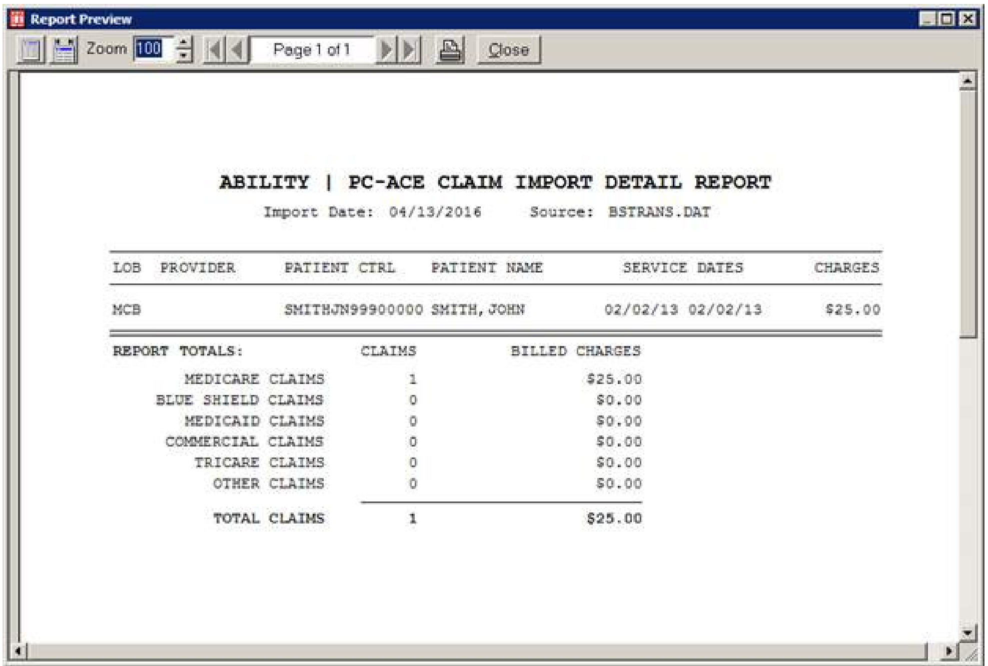


Figure 83

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 84).

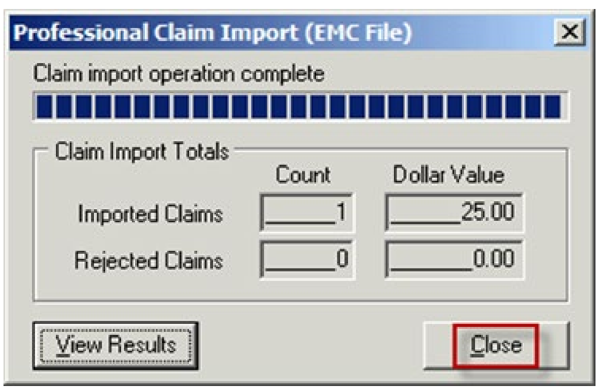


Figure 84

16. Select **Close** to return to the **Professional 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 **Professional Claims Processing Menu** icon (Figure 85).

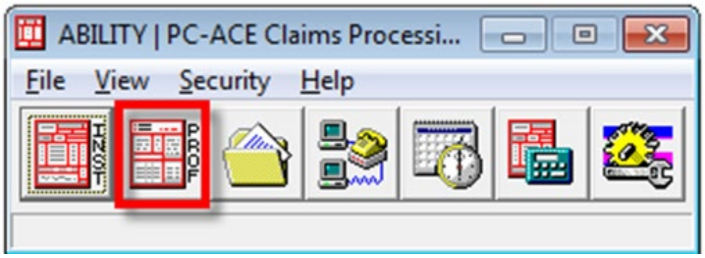


Figure 85

2. Select the **Process Claims** button (Figure 86).

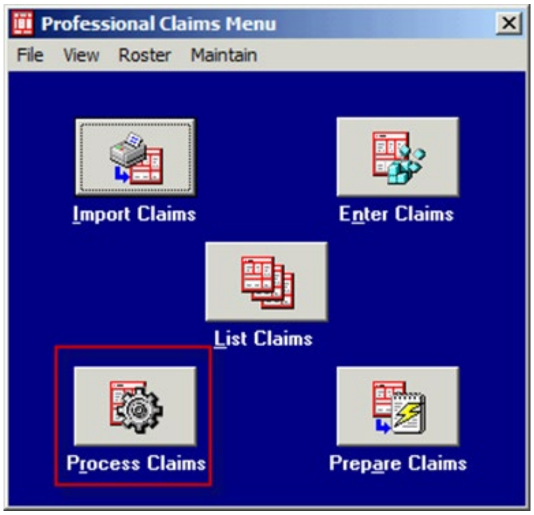


Figure 86

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 87).

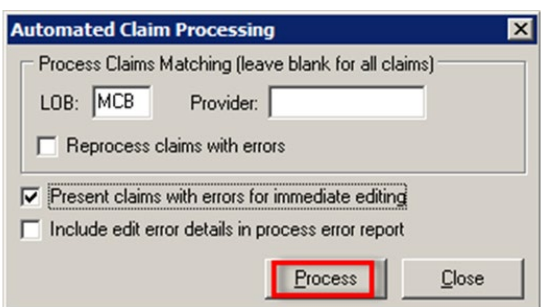


Figure 87

LOB:	The line of business of claims to be processed
TOB:	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 88).

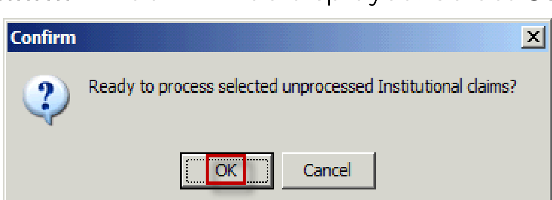


Figure 88

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 89).

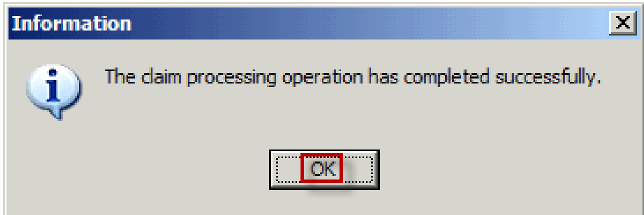


Figure 89

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 90).

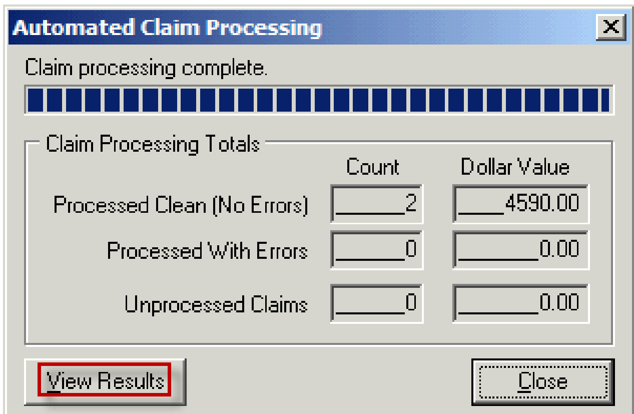
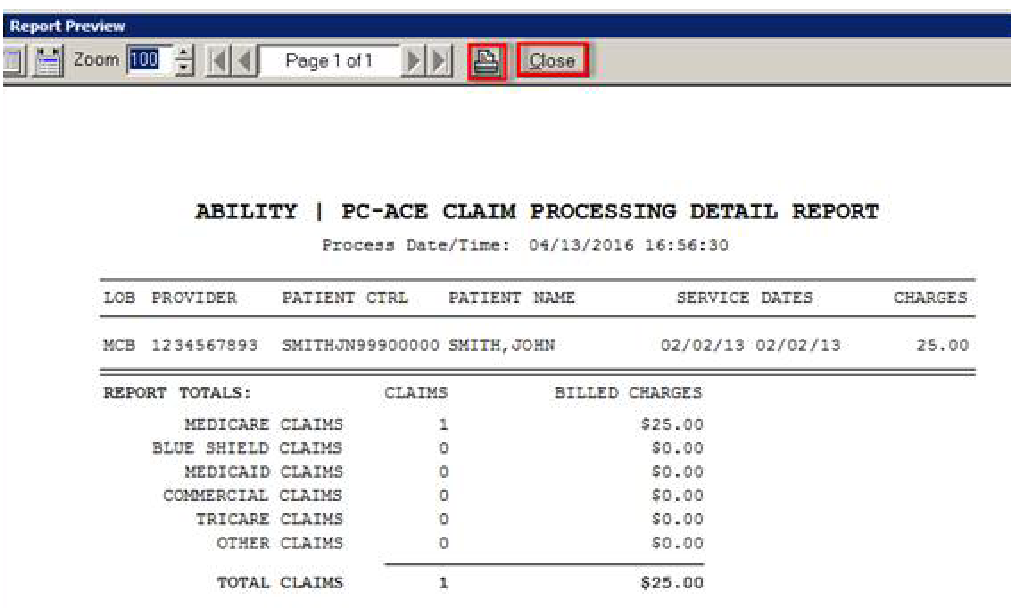


Figure 90

7. Select the **Close** button or select the **View Results** button.
8. When the **View Results** button is selected, the Adobe Acrobat will display the report, select the printer icon to send the report to the printer or select **Close** to return to the Professional claims list window (Figure 91).



ABILITY | PC-ACE CLAIM PROCESSING DETAIL REPORT

Process Date/Time: 04/13/2016 16:56:30

LOB	PROVIDER	PATIENT CTRL	PATIENT NAME	SERVICE DATES	CHARGES
MCB	1234567893	SMITHJN99900000	SMITH,JOHN	02/02/13 02/02/13	25.00

REPORT TOTALS:	CLAIMS	BILLED CHARGES
MEDICARE CLAIMS	1	$25.00
BLUE SHIELD CLAIMS	0	$0.00
MEDICAID CLAIMS	0	$0.00
COMMERCIAL CLAIMS	0	$0.00
TRICARE CLAIMS	0	$0.00
OTHER CLAIMS	0	$0.00
TOTAL CLAIMS	1	$25.00

Figure 91

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 **Professional Claims Menu** window, select the **Maintain Menu and select Transmission Log**. The **Professional 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 **PROF** from the **PC-ACE Claims Processing System** main menu (Figure 92).

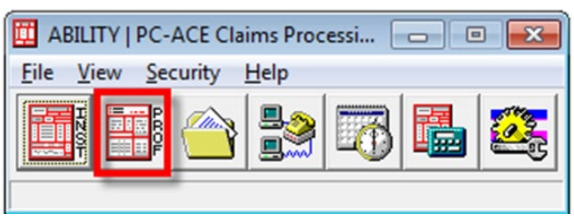
a. 

Figure 92

2. Select **Prepare Claims** (Figure 93).

a. 

Figure 93

3. The **Professional Claims Prepare for Transmission** box appears Select **Prepare Claims**. (Figure 94).

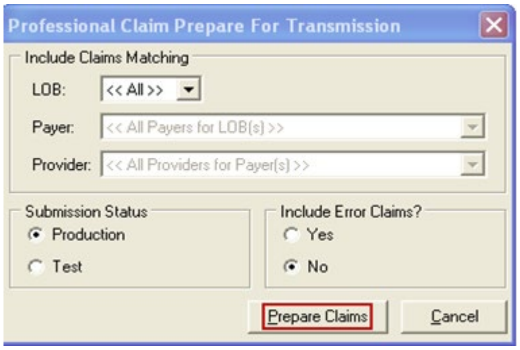
a. 

Figure 94

4. The **Confirm** box appears and states, “Ready to prepare selected Professional claims for transmission?” Select OK. (Figure 95).

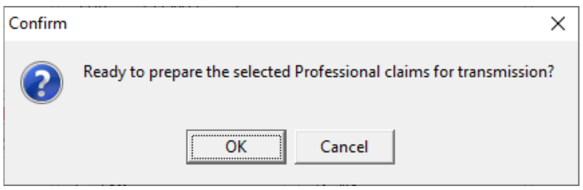
a. 

Figure 95

5. The **Information** box appears and states, “The claim operation has completed successfully.” Select **OK.** (Figure 96).

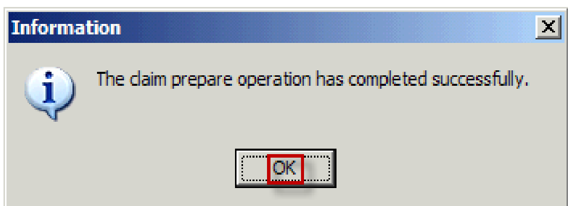


Figure 96

6. The **Claim Prepare for Transmission** box appears (Figure 97).

7. Select **View Results**.

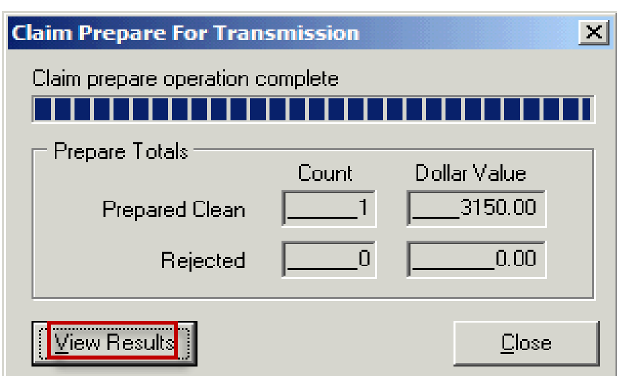


Figure 97

8. **PC-ACE Transmission Detail Report** will appear. To print this report, select the Print icon (top of tool bar, to the left of the **Close button**). This report does not confirm the transmission of claims. (Figure 98)

a.

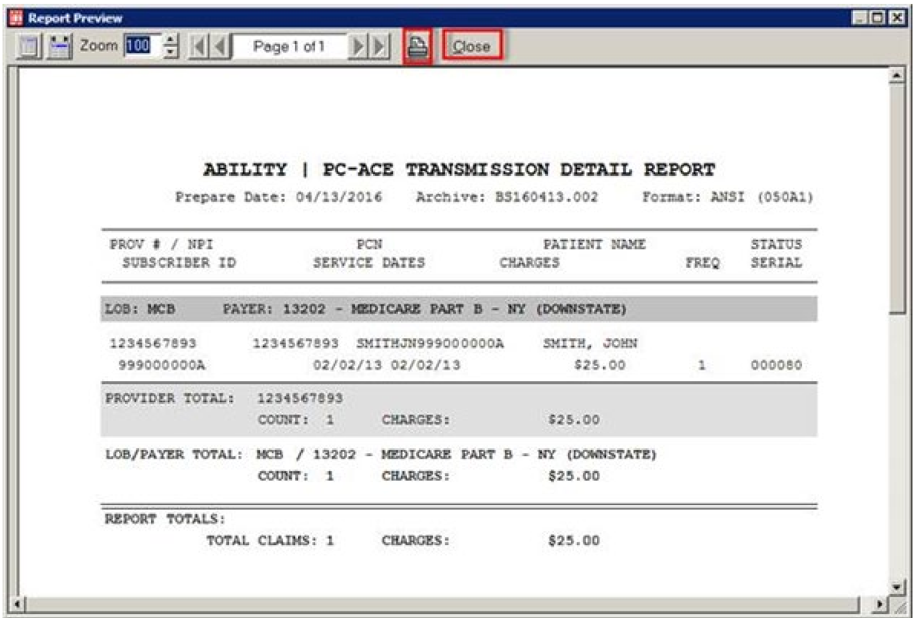


Figure 98

9. 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 B, the claims file to be transmitted created by PC-ACE will be named **BTRANS.DAT** by default and will be located in the **C:\WINPCACE** directory.

Please see the list of **NSVs** listed on our website under the **Resources > EDI Enrollment (on right side of page)** 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. **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 99).

Contact the **NGS EDI Help Desk** if any errors appear:

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

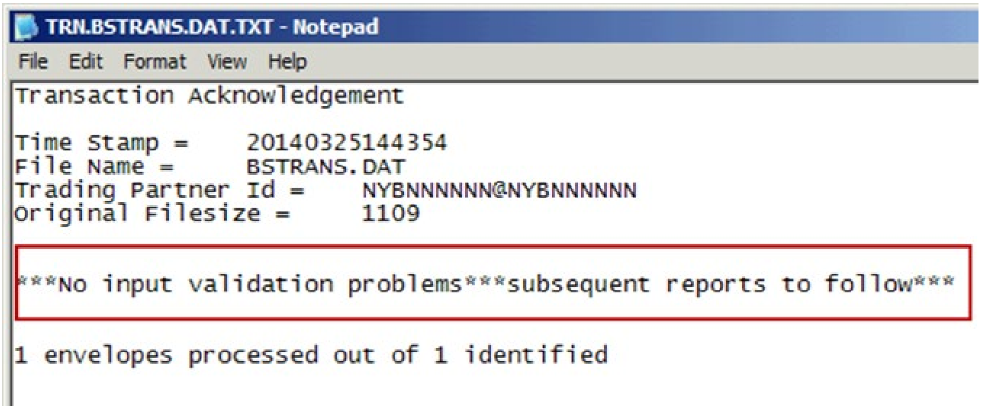


Figure 99

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 100).

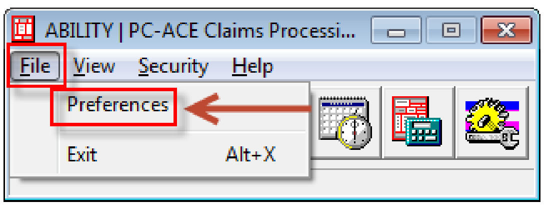


Figure 100

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 101).

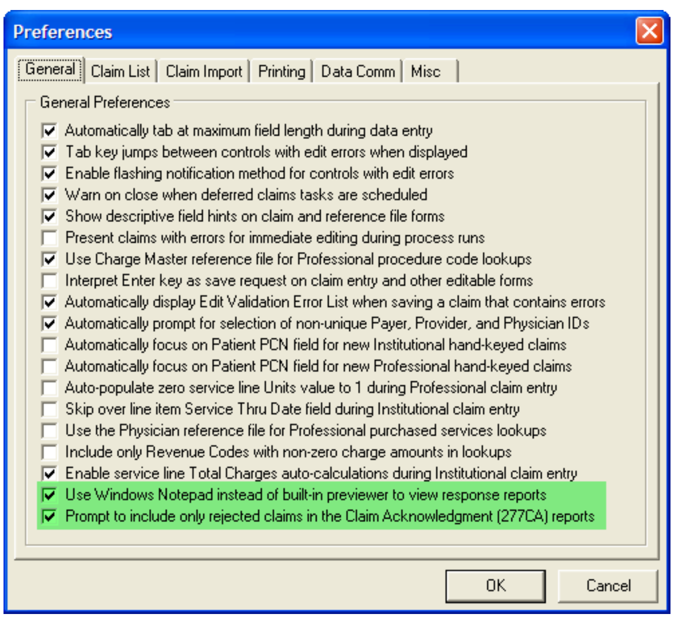


Figure 101

3. In order for PC-ACE to read 999 or 277CA files, they must be saved into the proper sub-folder within the WINPCACE folder (Figure 102):

   277CA files need to be saved in the Stat1500 (Part B) subfolder of the ANSI 277 folder.
   999 files need to be saved in the Ack1500 (Part B) subfolder of the ANSI 997 Folder.

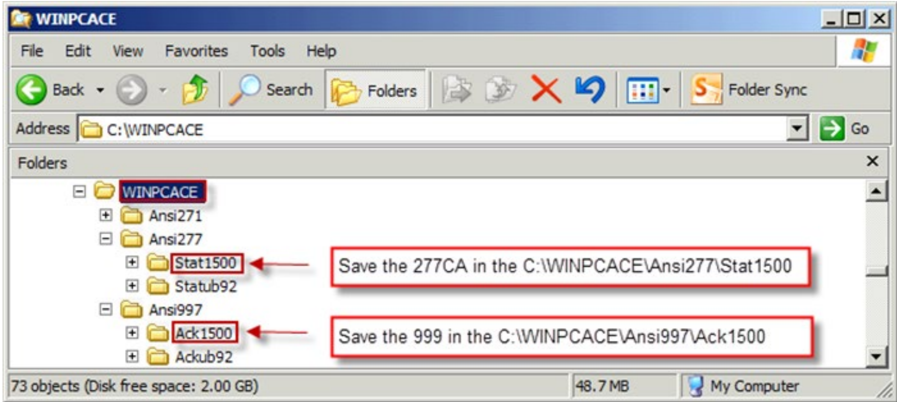


Figure 102

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 Professional Claims Menu. Select the **Maintain** menu item, then **Acknowledgement File Log** to read the 999 (Figure 103).

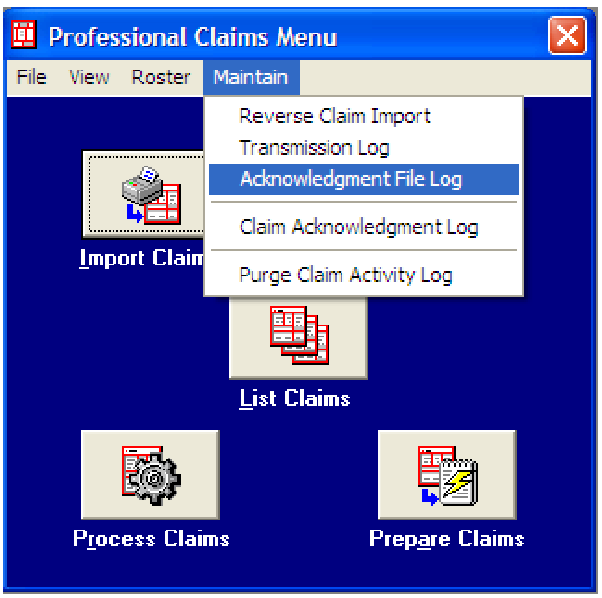


Figure 103

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 Report (Figure 104).

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

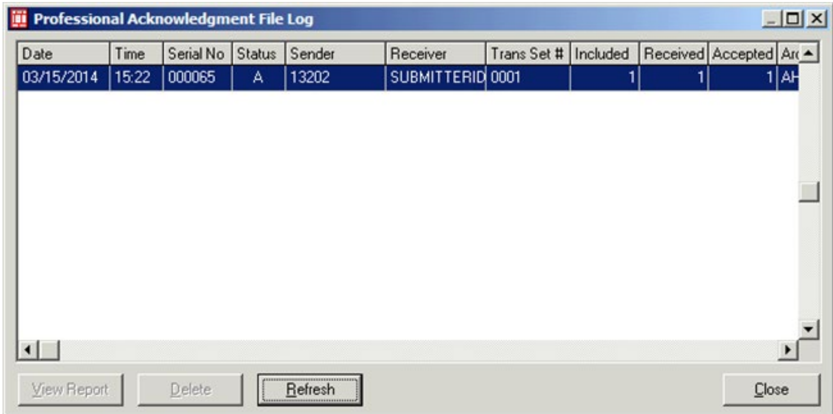


Figure 104

- **Look for** (Figure 105):
  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.

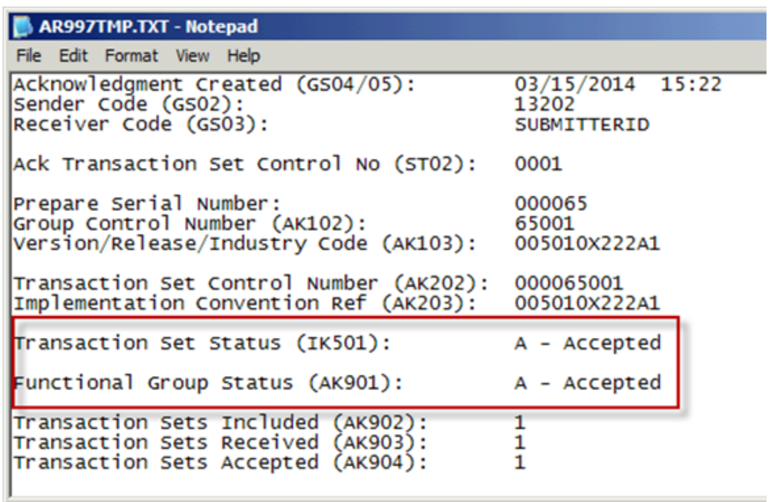


Figure 105

6. To read the 277CA, from the Professional Claim Menu, select **Maintain** and **Claim Acknowledgement Log** (Figure 106).

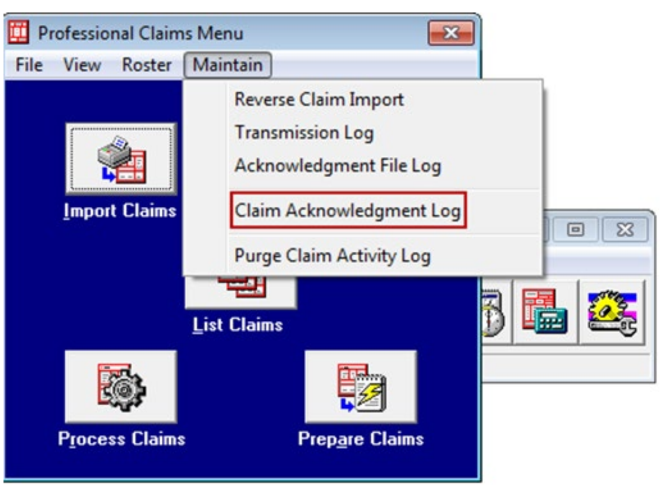


Figure 106

The following screen will be displayed to read the 277CA. From the Acknowledgement File Log screen, select the 277CA to be displayed and select **View Ack Report** (Figure 107).

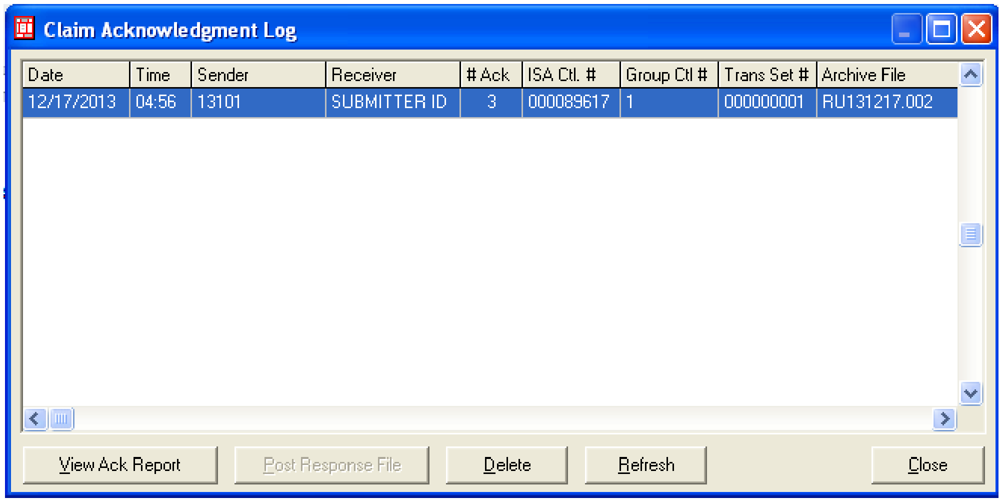


Figure 107

Look for **Total Accepted Quantity.** Any claims that **reject** will need to be **corrected** and **resubmitted** (Figure 108):

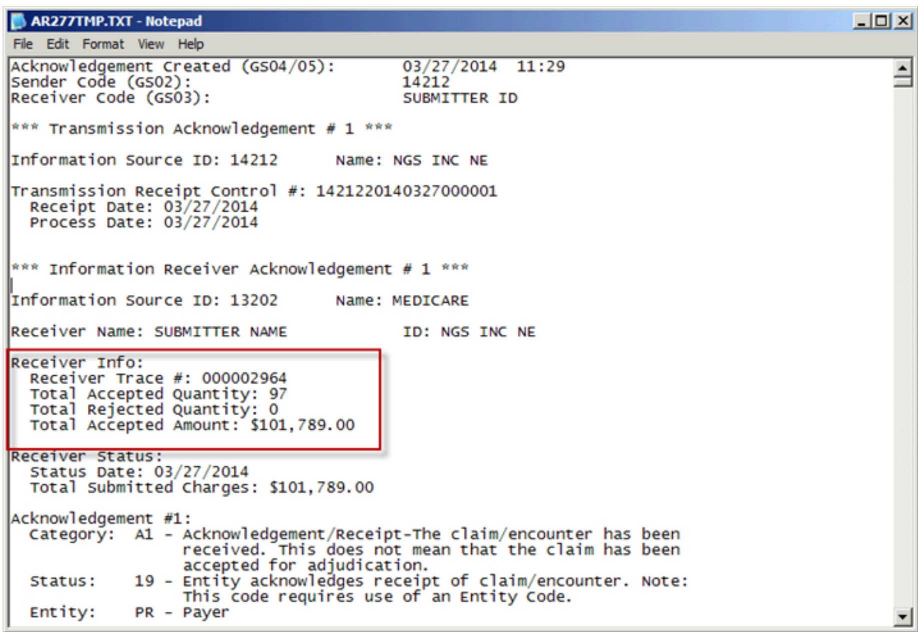


Figure 108

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 109).

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

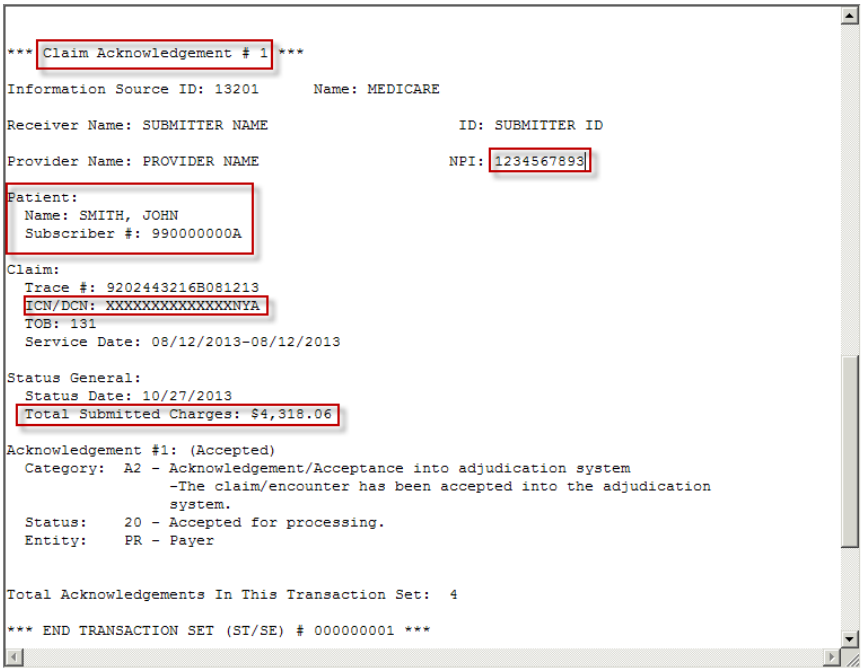


Figure 109

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 110).

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.

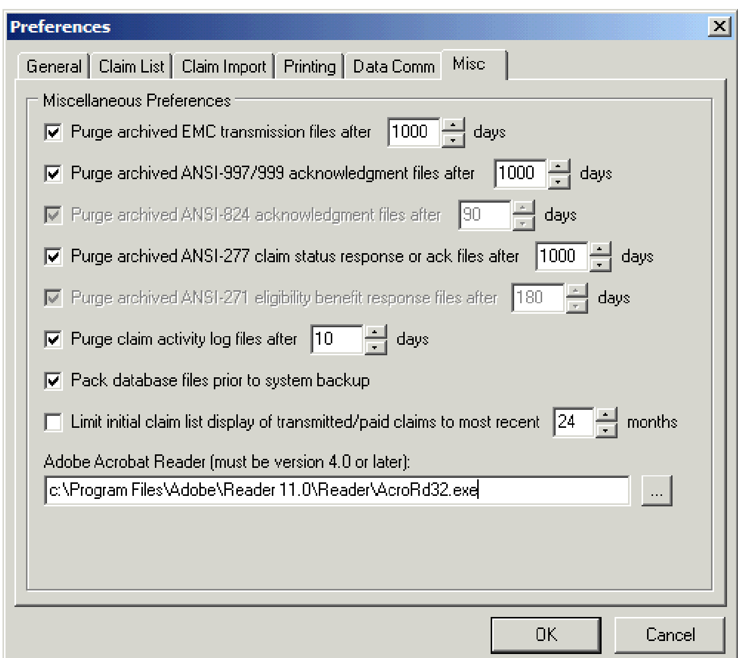


Figure 110

Appendix B: Setting up Shortcuts for File Locations

To assist in the placement of new reports shortcuts can be created (Figure 111).

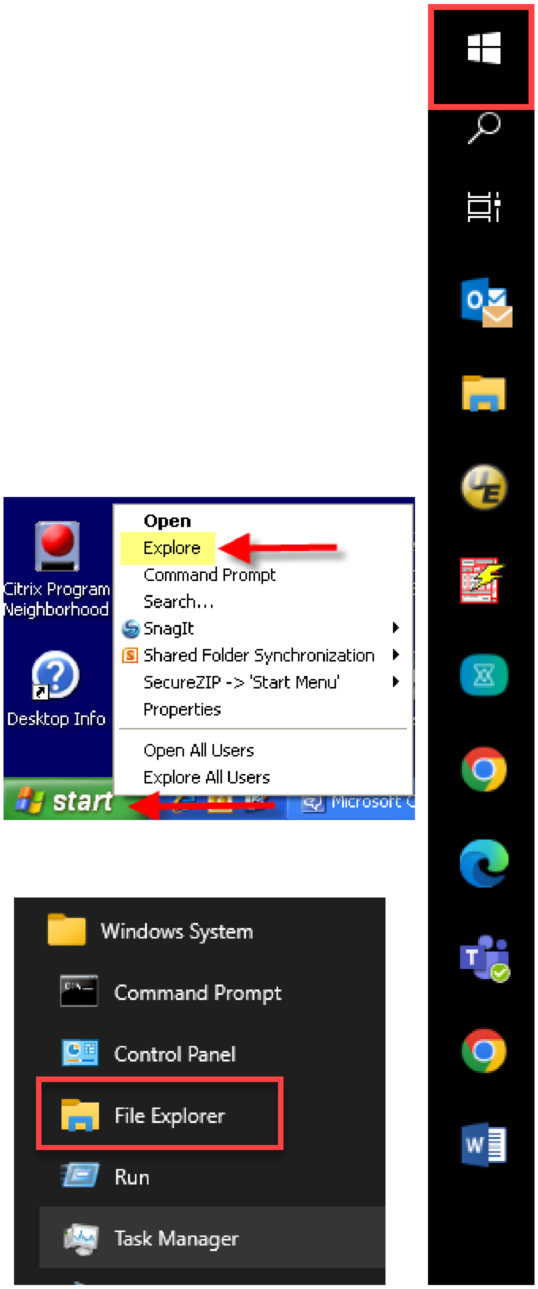


Figure 111

Click on Windows symbol and locate Windows Systems then select File **Explore** (Figure 112).

Figure 112

Locate WINPCACE under Windows ©: Double click on the **WINPCACE** folder (Figure 113).

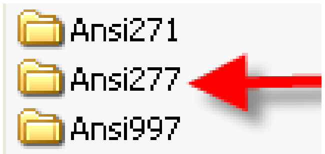


Figure 113

Double click on the ANSI 277 folder for a 277 shortcut. If desired, repeat this process for A 999 shortcut in which the 997 folder should be selected (Figure 114).

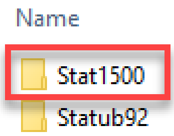


Figure 114

Right click **Stat1500** folder for Part B (Figure 115).

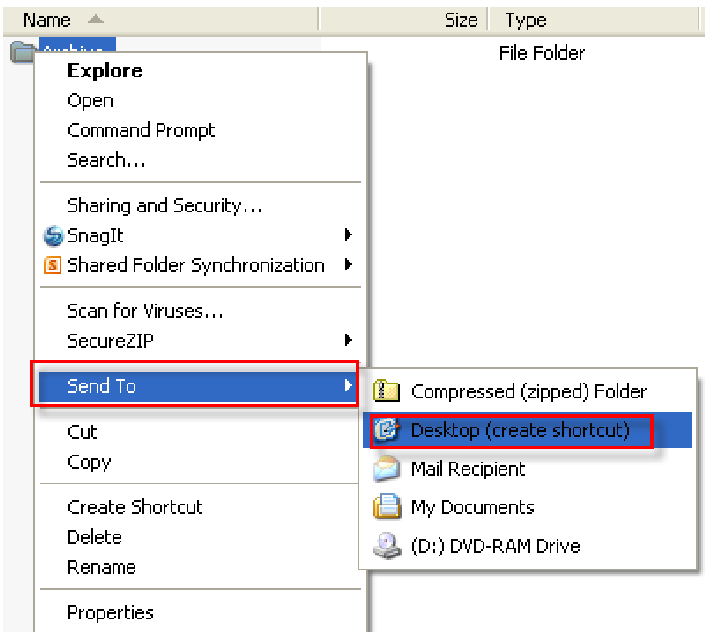


Figure 115

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 116).

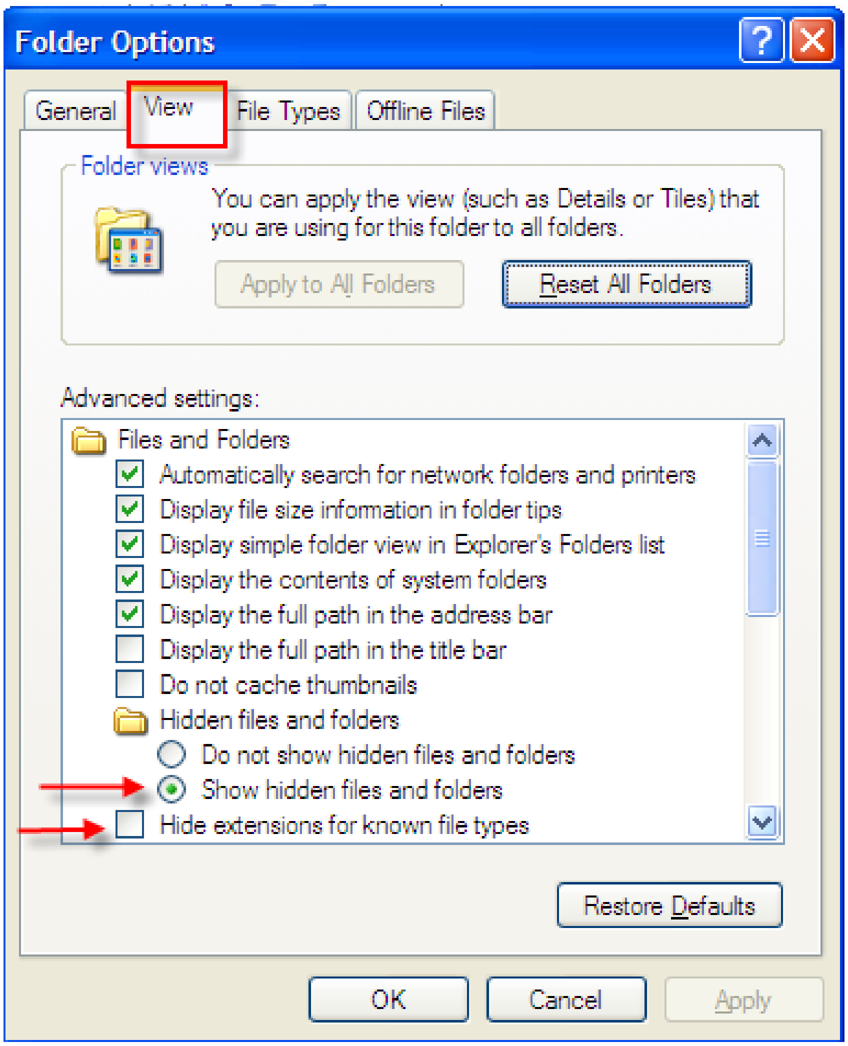


Figure 116

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 117 and 118).

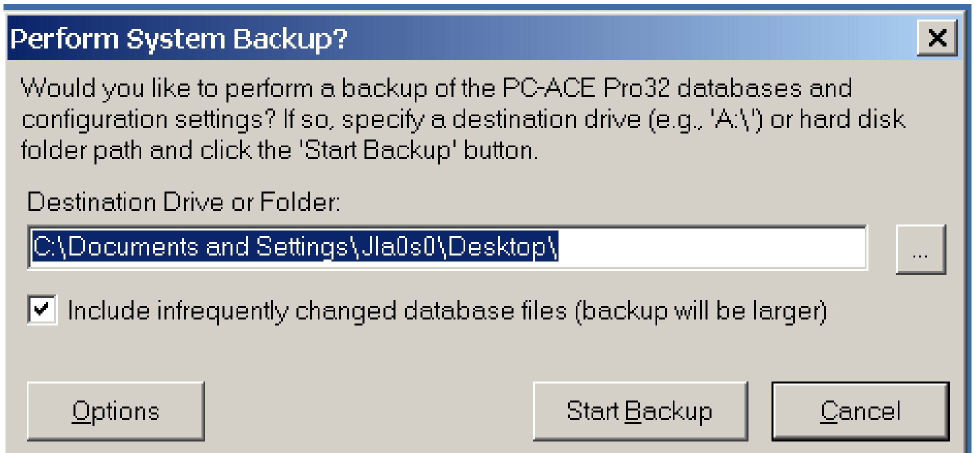


Figure 117

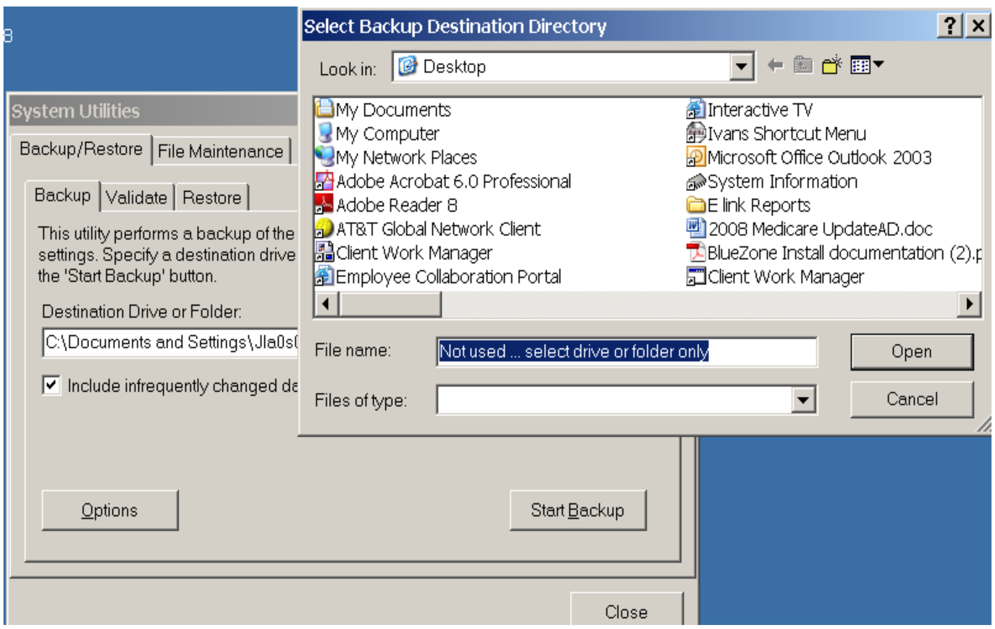


Figure 118

2. This will put the backup file named **PCACEPBK.ZIP** on to the desktop (Figure 119).

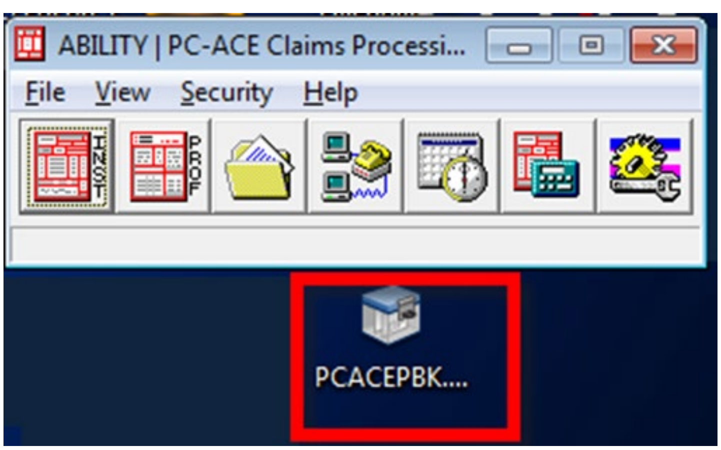


Figure 119

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 120).

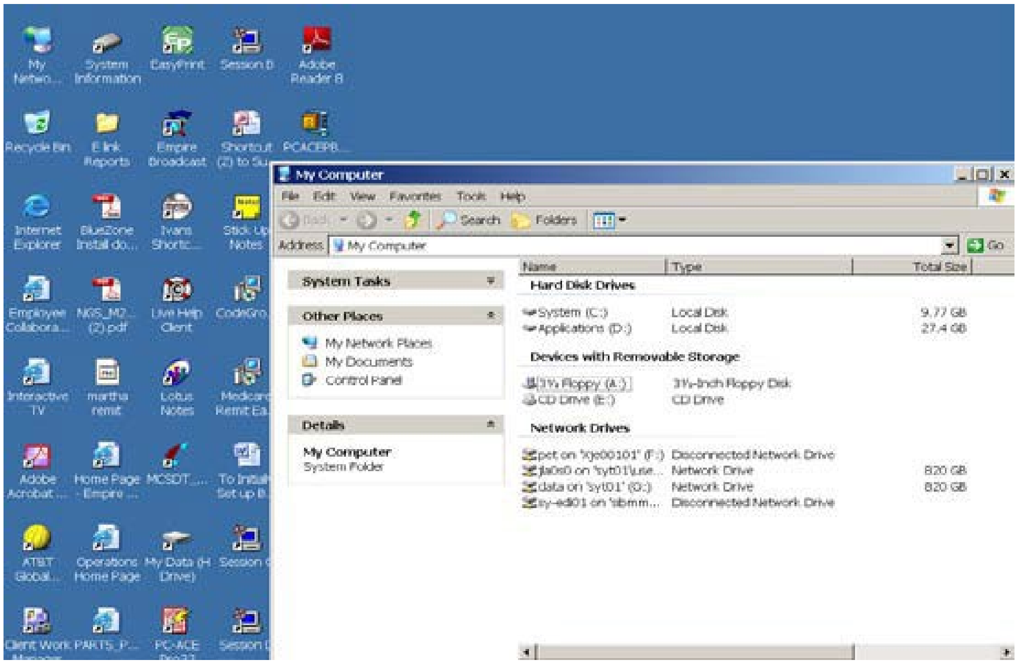


Figure 120

Section 8 - Additional Features

Archiving Claims

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

1. Select the **Prof** button on the main toolbar.
2. Select the **List Claims** button.
3. Select the **File** from the Menu at the top of the screen
4. Select **Maintain Claim Archives**
5. Select the **New** button and enter a name for the archive, then select **OK**.
6. Select the **Close** button. The **Professional Claim List** window will appear.
7. In the **Claims List Filter Options** section at the bottom of the **Professional Claim List** window, select the drop down arrow and select **TR-transmitted only**.
8. Select the **Advanced Filter Options** button near the bottom of the **Professional Claim List** window, and enter the filter criteria.
   Example: If today's date is March 13, 2014, to archive everything except the past three months, do the following:
   a. Check the box in front of **"Invert filter logic…"** at the bottom of the Advanced Claim List Filter Criteria window.
   b. Enter **"01/01/2014"** in the first box in the **Transmit Date:** field, then enter **"3/13/2014"** in the second box.
   c. Select **OK**.
   d. The **Professional Claim List** window appears and the only claims displayed are those that were transmitted more than three months ago. These are the claims to be archived.
9. Select **Filter** from the Menu at the top of the screen and select **Check All Claims**. Each

claim now has a checkmark in the box at the left of the line it is on.

10. Select the **File Menu** and select **Open Claim Archive**
11. Double-click the archive that was created in the steps above. An information window will pop up. Read the contents, then select **OK**.
12. Select the **Actions Menu** and select **Archive All Checked Claims** (near the bottom of the **Actions** menu.) Do not select **Archive Selected Claim**, as that will only archive the claim that is highlighted.
13. An information window will appear. Read the contents, and then select **OK**.
14. The claims are no longer shown in the list. They are not gone; they have been stored in the archive. To see these claims, select the **File** menu, and then select **View Archived Claims**.

Note: Do the following to view these claims again once PC-ACE has been exited:

a. **Open** the claims list
b. Select the **File Menu** and select **Open Claim Archive**.
c. Double-click the archive to view, read the information in the pop-up information window, and select **OK**.
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.