

PC-ACE 5010 Version Frequently Asked Questions

Installation and Getting Started

I would like to use PC-ACE as my billing software, what is my first step?

Once you have registered online for EDI transactions and selected PC-ACE as your software on the EDISS Connect registration site, you can contact the EDI Contact Center for the installation password.

How do I install PC-ACE on my computer?

Locate the PC-ACE program (setup.exe) on the EDISS website under *Installation and Update Files*. When prompted, select RUN for the setup.exe file. A password will be required to install the software. If you do not see the RUN option, please ensure that you are running Internet Explorer on a Windows Operating System to download the program.

Follow the on-screen wizard steps to complete the installation. When prompted to select a destination drive, for best performance, select a drive local to your machine (i.e., the C drive). The PC-ACE files will be installed in the WINPCACE directory on the selected drive. A desktop icon will be created for PC-ACE.

How do I install PC-ACE on a network?

To install the software on a network, first install the full PC-ACE version on a shared server. Follow the on-screen wizard steps to complete the installation. When you are prompted to select a destination drive, select a drive accessible by all workstations on the network that will require PC-ACE access. Next, from each individual workstation, run the Client32.exe file, which is located on the server. For more detailed information on how to accomplish these tasks, please refer to *Getting Started with PC-ACE* in the PC-ACE Help Topics system. (To find this document, select the *Help* tab at the top of the PC-ACE Claims Processing System main toolbar. From the drop-down menu, select Help Topics. Select the Contents tab at the top of the Help Topics: PC-ACE Claims Processing System screen. Finally, select *Getting Started with PC-ACE*).

What is the login and password to get started?

PC-ACE is configured as a default user that has full-system access rights. The default User ID and password are both SYSADMIN. If you are logging in to PC-ACE for the first time, use this default information. If you have difficulties logging into the system, contact EDI Support Services for assistance. We encourage all users to create their own User ID and password in PC-ACE as soon as possible after installation of the program for security reasons. They will want to keep the default username and password in PC-ACE in case they forget their User ID or password.

How do I change my password?

To modify your User ID and Password, select the Security option at the top of the PC-ACE Claims Processing System main toolbar. From the drop-down menu,

select Add/Update User. In the Security List menu, highlight the user name for which you wish to change the password and select View/Update. Designate a new password in the Password field and click on **OK** to complete this step.

Reference File Maintenance — Entering Information

Where do I enter the Submitter ID?

The Submitter ID must be entered in Reference File Maintenance. Follow these steps to ensure you are entering the information in the appropriate field:

1. Open Reference File Maintenance from the PC-ACE main toolbar.
2. Select the Codes/Misc tab at the top of the Reference File Maintenance screen.
3. Select the box labeled Submitter.
4. In the Submitter Setup screen, select the appropriate Claim Type at the top of the screen. At the bottom of the screen, select View/Update.
5. This will bring you to the Submitter Information screen. Enter the Submitter ID in the field labeled ID (between LOB and Name) under the General tab, overwriting the initial template fields.
6. Click on **Save** to save your changes.

What does LOB mean?

LOB is an acronym for Line of Business. If you right-click on the LOB field, PC-ACE will provide a list of options from which you may choose.

What is a Payer ID?

A Payer ID is a way of identifying the payer that is being billed. There may be one or more Payer IDs for each Line of Business. If you right-click on the Payer ID field, PC-ACE will provide a list of options from which you may choose.

Do I enter dashes in the HIC number and Tax ID? Should I enter decimal points in diagnosis codes?

When entering HIC numbers and Tax IDs do not include dashes. If you try to save a provider file in Reference File Maintenance with dashes in the Tax ID, an Edit Validation Error list will appear stating there are invalid characters. The same will happen if the HIC number includes dashes and you try to save a claim.

Decimal points also should not be entered for diagnosis codes. An Edit Validation Error will also appear if a decimal is entered.

Claim Entry

I just attempted to save a claim and received an Edit Validation List with flashing boxes in my claim screen. What does this mean?

These flashing boxes indicate an error with the information entered in that specific box that needs to be corrected before saving the claim. If you click Save in any area of PC-ACE where you have been entering information, it will either save the data (if everything is correct), or the Edit Validation Errors List will appear listing all the errors currently in the claim. You can either double click on one of the errors on the list to bring you to the location of the error, or you can close the list and just look for the flashing boxes indicating that a correction would need to be made. Once a correction has been made, the box may continue to flash until the claim has been re-saved. The red and purple flashing boxes signify different levels of system edits. It is highly recommended that you work through the errors by using the Edit Validation Errors list.

Why should I enter my information into Reference File maintenance prior to creating claims?

Reference File Maintenance is an option that can save time and increase accuracy. By right clicking in the Patient Control Number box, Last Name or First Name box, the Patient Selection box will appear, listing all

the patients that were built into the Reference File Maintenance. You can then select whichever patient you need and all information for that patient will be automatically populated into the claim.

What if I start entering a claim for a patient I haven't added to Reference File Maintenance?

If you start billing a claim and notice the patient you are billing for is not in the Patient Selection list, instead of closing out of the claim and going back to the Reference File Maintenance, you can choose New from the options listed at the bottom of the screen. This will open the *Patient* tab from the Reference File Maintenance and allow you to build in the patient information while still in the claim.

Sending Claims

Now that I have entered my claims, how do I send them to the payer?

To view the claims that you have saved, click on the List Claims button on the Professional or Institutional Claims Menu. Claims with the status of *CLN* are clean and ready to be prepared for transmission.

The first step in transmitting claims to a payer is to prepare claims. Select the Prepare Claims button on the Claims Menu. When the *Claim Prepare For Transmission* dialog box opens, select Prepare Claims. Click *OK* on the Confirm dialog box. You can select a certain LOB, payer and /or provider to Prepare claims for during the Prepare process if you wish to specify which claims you would like to prepare.

After you have completed the Prepare Claims function, an electronic claim file will be created and stored in the WINPCACE directory. Institutional claim files will have the file name BCTRANS.DAT and Professional claim files will be named BSTRANS.DAT.

To send these prepared claims to EDI Support Services (EDISS), please refer to the [emc_claims.ht overview pdf](#) located at edissweb.com. After selecting your state, click on Software/Connectivity in the toolbar, then under the HyperTerminal – Dial-up Connection section, click on [emc_claims.ht overview](#). This document will walk you through the process for sending prepared claims to EDISS.

Note: If you have not configured HyperTerminal to send and receive files, please refer to the [htconfig.pdf](#) file located on the EDISS EDI webpage. Then proceed with the Connecting to the BBS using HyperTerminal document.

When would I process claims?

This feature runs all the PC-ACE edit validation rules against the entered claims and is used primarily after you have reactivated claims. When you reactivate claims, you should also process them from the claims menu to move them back to a *CL—to be transmitted* status so they can be resent.

When do I prepare claims and what does this mean?

Claims need to be prepared before they can be sent to EDISS. This is a necessary step that generates a claim file that can be transmitted for processing. If this step is not completed, the last claim file that was prepared will be sent again. When you prepare the claims, only clean (CLN) claims will be processed unless you select to send claims with errors.

Please note that after you have completed the “Prepare” step, the claims are moved from the *CL—to be transmitted* location to the *TR—transmitted only* location

Miscellaneous

Do I have to back up my files?

PC-ACE has the capability to do system backup and restores. In the event a catastrophic system failure results in the loss or compromise of PC-ACE database files, a complete database restore operation can be performed from the most recent backup. However, if you have not been backing up the system, it is possible that all information entered into the software could be lost.

You will be prompted to perform a backup each time you exit the PC-ACE program. You can either click on *Cancel* to skip the backup or you can select a Destination Drive or Folder for the placement of the backup data and then click on *Start Backup* to initiate the process.

Why do I need to send a test file?

During the testing process, EDI Support Services will determine if the record layout structure and batching is correct. There is also a series of information that EDI checks in test files (i.e., Submitter ID, PIN numbers, insurance information and dates) in an effort to avoid claims errors in the claims processing system.

Can I transfer my patient and provider files into my PC-ACE software from another billing program?

This feature is not available. All provider and patient information must be entered manually into the Reference File Maintenance.

Can you come to my office and show me how to use the PC-ACE software?

EDI Support Services does not provide on-site support for electronic submitters.

Fortunately, the PC-ACE software is very user friendly and we do support it over the phone. User documentation has also been created to assist in learning the software.

I need to make a change before I resubmit a previously submitted claim, do I have to completely retype the claim?

Click on the Professional or Institutional icon and click on the *List Claims* option. This will open the Professional or Institutional Claims List. Toward the bottom of the screen, there will be a *Location* box with a drop-down arrow.

Change the location to *TR—transmitted only*. A list of all claims should be present. Put a check mark next to the claims that need to be resent. Next, click on the *Actions* option listed on the menu bar. Choose *Reactivate all Checked Claims*. A confirmation box should appear asking if you are ready to reactivate all checked claims. Click *OK*. This will move the claims from the *TR—Transmitted Only* location to the *CL—to be transmitted* location. The next step is to change the status from *UNP* to *CLN*, which can be done simply by opening each claim and clicking *Save*. Or by closing the claim list and selecting “process claims” from the claims menu. At this point, the claim file can be prepared and sent.

Can I copy a claim in PC-ACE and just change the patient name on each claim and/or change other claim information as needed?

Yes, a copy feature is present on the *List Claims* screen. Select the claim you want to copy and press the *Copy* button at the bottom of the screen. A copy of this claim will appear on your screen.