

## PROVIDER ELECTRONIC SOLUTIONS (PES) SOFTWARE Training

/// 1 / 8 January 2009



## Description

### **Welcome to the Provider Electronic Solutions (PES) Training**

PES is a computer based software used to submit electronic claims to Florida Medicaid.

This course will introduce you to the PES software that is one of several options to replace the WINASAP software used to submit claims.

As of July 01, 2008 WINASAP will be discontinued.

Provider Electronic Solutions Software

/// 2 / 8 January 2009



## Objectives

- Install PES software
- Navigate through PES
- Complete Florida Medicaid required fields in PES to create and send original claims, adjustments, and voids
- Submit claims using PES

## Installing PES

## Installing PES

- How to obtain PES
- The minimum requirements for operating PES
- Two methods of installation: installing from a CD and installing from a ZIP file

## Installing PES

PES allows you to send groups of claims or one claim to EDS through the public internet.

Media	How to Get it
Download from the Web/Zip™ file	Prior to July 1, 2008, download from the Florida Medicaid Provider Readiness website at: <a href="http://mymedicaid-florida.com/ProviderReadiness">http://mymedicaid-florida.com/ProviderReadiness</a> After July 1, 2008, download from the Florida Medicaid website at: <a href="http://mymedicaid-florida.com">http://mymedicaid-florida.com</a>
CD/ROM	Prior to July 1, 2008, contact EDI at (850) 523-5220. After July 1, 2008, contact the EDI Help Desk at (800) 289-7799 option 3. EDS will send you one CD/ROM with accompanying documentation.

## Installing PES

### Your PC must have a method of connecting to the Web.

- An Internet Service Provider (ISP) can provide this connection through a dial-up modem, DSL, or a high speed cable link
- Optionally, EDS provides a Remote Access Server (RAS) to gain access to this Web site only, using your modem. For questions on RAS
  - Prior to July 1, 2008, call EDI at 850-523-5220
  - After July 1, 2008 call EDI at 800-289-7799 option 3.
- If you live outside the Tallahassee calling area, you must be able to place a long distance call over the phone line

## Installing PES

### PES is designed to operate on a PC with the following equipment requirements:

Minimum	Recommended
Internet Explorer Version 5.5 or Netscape Browser Version 6.1	Internet Explorer Version 6.0 or Netscape Browser Version 7.1
Pentium II	Pentium III
*Windows 98/2000/XP	Windows XP
64 Megabytes RAM	128 Megabytes RAM
800 x 600 Resolution	1024 x 768 Resolution
28.8 Baud Rate modem (required only for dial-up transmission)	56K Baud Rate modem (only for dial-up transmission)
CD-ROM drive	Printer with 8pt MS Sans Serif font (Optional)
100 Megabytes free Hard Drive space	
Dial-Up Networking (If user has no ISP, Internet Service Provider)	

\*Windows 98 is the minimum platform, but it is no longer supported by Microsoft

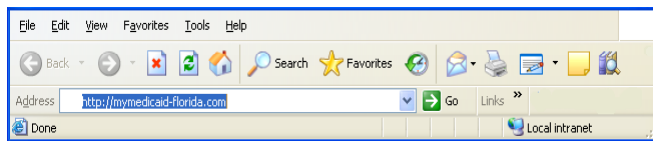
## Installing PES Using the Zip™ File

### Download the PES Zip™ file

- Prior to July 1, 2008 access the Florida Medicaid provider readiness site at the following address:  
<http://mymedicaid-florida.com/providerreadiness/>

After July 1, 2008, access the Florida Medicaid homepage at the following address:

<http://mymedicaid-florida.com>



## Installing PES Using the Zip™ File

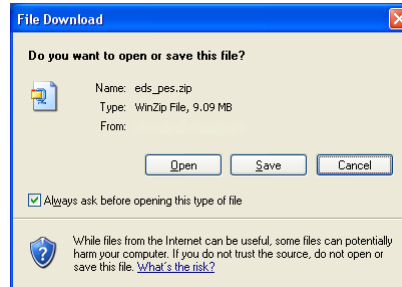
A screenshot of the Florida Medicaid Agency for Health Care Administration website. The header includes the Florida Medicaid logo and the text "Florida Medicaid Agency for Health Care Administration Champions of Health Care". A navigation menu on the left lists "Home", "Area Offices", "Contact Us", "Provider Support", "Find a Provider", "Enrollment", "EDI", "Pharmacy", and "TPL". The main content area is titled "Electronic Data Interchange (EDI)" and contains the text "This is a placeholder for the EDI content." There is a search bar in the top right corner.

- On the homepage, click the **EDI** link
- From the Florida Medicaid Provider Software page
  - Click the **Provider Electronic Solutions** link
  - The Provider Electronic Solutions Software Specifications page displays
- Review the information on the page
- The Provider Electronic Solutions Full Install is located at the bottom of the page

## Installing PES Using the Zip™ File

### Installing using Zip™ file

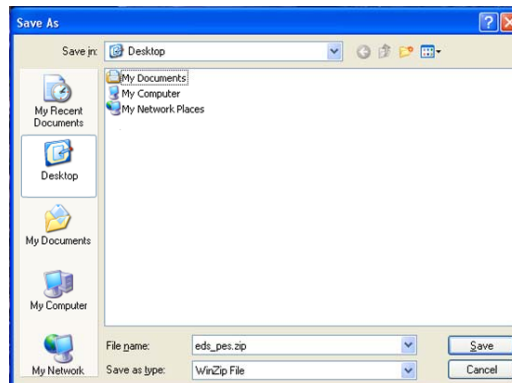
- From the File Download window, click the **Save** button to display the Save window
- Save the file to a PC Hard drive



## Installing PES Using the Zip™ File

### Installing using Zip™ file

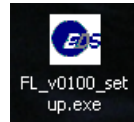
- Select the **Save in:** location from the drop down menu
- Click the **Save** button to begin downloading
- Download times may vary for reasons that include your Internet connection, and/or your PC's processing speed



## Installing PES Using the Zip™ File

### Installing using Zip™ file

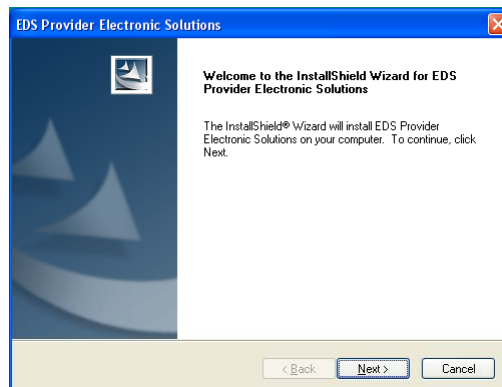
- After downloading has completed go to your PC desktop
- Double-click the "FL\_v0100\_setup.exe" icon



## Installing PES Using the Zip™ File

### Installing using Zip™ file

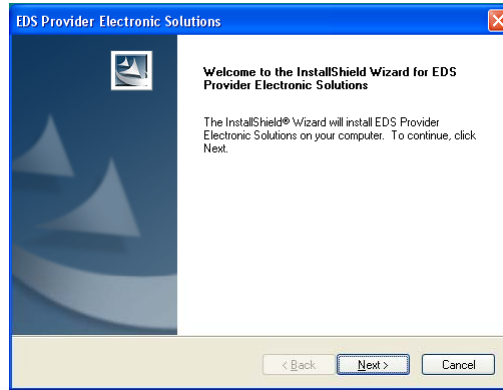
- The InstallShield Wizard Welcome window appears
- Click the **Next** button to begin the installation program



## Installing PES Using the CD-ROM

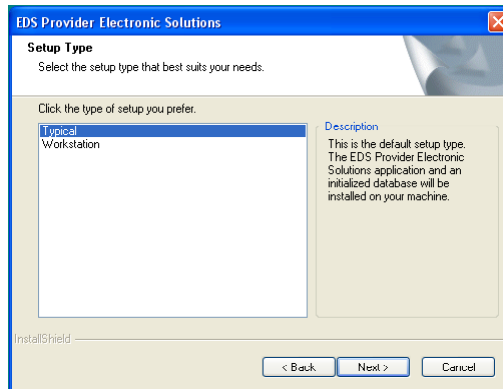
The installation program automatically begins when using the CD-ROM.

- The InstallShield Wizard Welcome window appears
- Click the **Next** button to begin the installation program



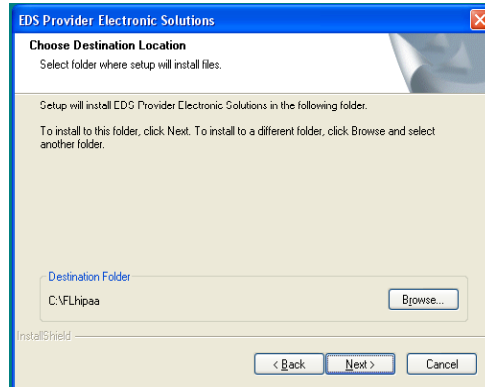
## PES Installation Wizard

- On the Setup Type window, select the type of installation to be executed – select Typical
- For workstation setup contact the EDI Help Desk for instructions
- Click the **Next** button to continue



## PES Installation Wizard

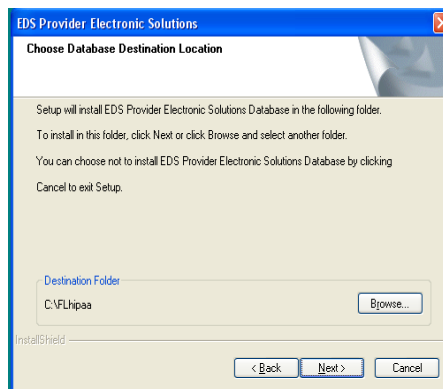
- From the Choose Destination Location window, browse to select a destination folder
- Or, click the **Next** button to choose the default destination folder (recommended)



## PES Installation Wizard

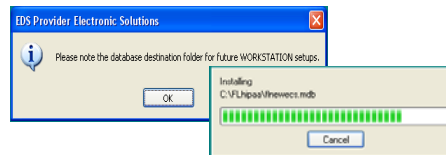
- From the Choose Database Destination Location window, browse to select a destination folder
- Or, click the **Next** button to accept the default destination folder (recommended)

NOTE: Please note the database destination folder for future WORKSTATION setups.

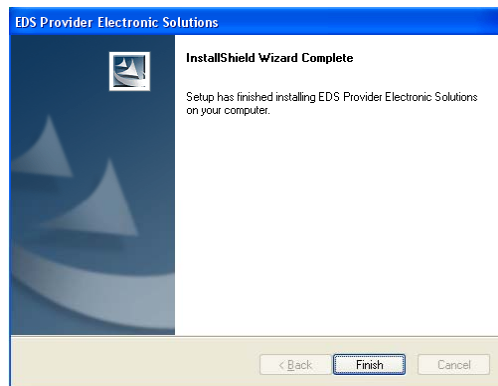


## PES Installation Wizard

- The database destination reminder appears. Click the **OK** button to continue, and setup will begin installing



- Click the Finish button to complete the installation



## Installing PES

- You are not required to have an Internet connection to use PES.
  - True
  - **False**
    - You must have one of the following to use PES: dial-up modem, DSL, or a high-speed cable link
- Which of the following methods are available for installing PES: (check all that apply)
  - **From a ZIP File**
  - **From a CD**
  - From a diskette
    - You can install PES using a ZIP file you download from the Florida Medicaid website or you can request a CD by contacting EDI.
- What is the Florida Medicaid website?
  - [www.mymedicaid-florida.com](http://www.mymedicaid-florida.com)

## Summary

- That you can obtain PES by contacting the EDI Help Desk at 1(800)829-0218 or from the Florida Medicaid website at: <http://mymedicaid-florida.com>
- The minimum requirements for operating PES
- Two methods of installation: installing from a CD and installing from a ZIP file

## Accessing PES

## Accessing PES

Objectives for Accessing PES:

- Access PES two different ways
- Change your PES password
- Upgrade PES

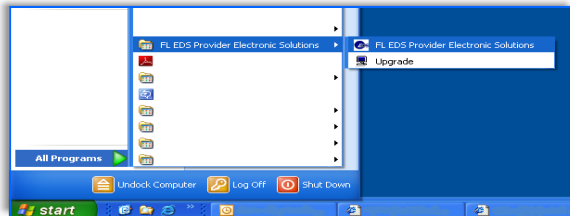
## Accessing PES

### Two Ways to Access the Application:

1. Double-click the application folder from the desktop



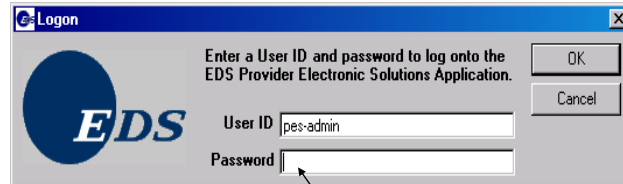
2. Click the **Start** button on your desktop, then select **Programs > FL EDS Provider Electronic Solutions**



## Accessing PES

### Accessing the application

Login with the default user  
password: *eds-pes*

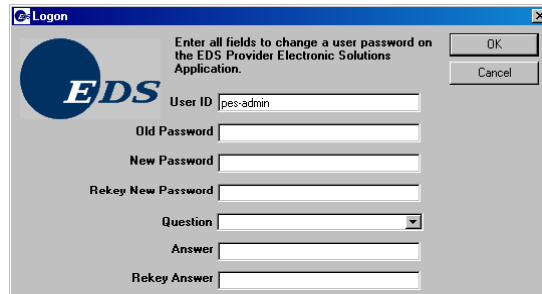


Type the default  
password here

## Accessing PES

### Accessing the application

- The first logon into PES will require you to create a new user ID and password
- Store your new user ID and password in a safe location for future use



## Changing the Password

The password is defaulted to prompt you to change the password every 90 days. You can change the password at any time using the following steps:

1. Go to **Tools > Change Password**; the following dialog box appears:

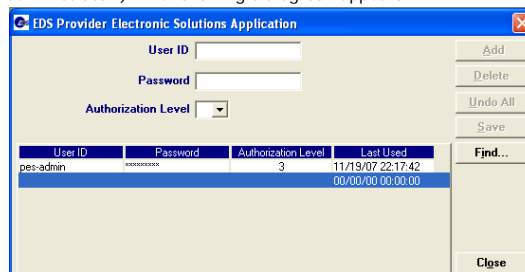


2. Enter your old password in the **Old Password** field.
3. Enter your new password in the **New Password** field.
4. Re-enter your new password in the **Rekey New Password** field.
5. Choose a security question, in the event you lose or misplace your password.
6. Enter and re-enter the answer to your security question in the designated fields.
7. Click the **OK** button to save your new Provider Electronic Solutions password.

## Security Maintenance: Adding New Users

You may choose to give PES users different levels of security. To add a new user, complete the following instructions:

1. Go to **Security > Security Maintenance**. (You must be logged on as an administrator.) The following dialog box appears:



User ID	Password	Authorization Level	Last Used
pes-admin	XXXXXXXXXX	3	11/19/07 22:17:42 00/00/00 00:00:00

2. Enter a new User ID in the **User ID** field.
3. Enter the new user's password in the **Password** field.
4. Select the new user's authorization level.
  - **User (Non-administrator)** – This option restricts users from adding or removing additional users.
  - **Administrator** – This option allows the user to access the Provider Electronic Solutions software, create and save claims, submit electronic transactions, adjust their personal options, and create new users.
5. Click the **Save** button; click **Close** to close the Security Maintenance screen.
6. When the new user logs on, they will be prompted to create a new password.

## Security Maintenance: Removing New Users

You may choose to give PES users different levels of security. To add a new user, complete the following instructions:

1. Go to **Security > Security Maintenance**. (You must be logged on as an administrator.) The following dialog box appears:

The screenshot shows a dialog box titled "EDS Provider Electronic Solutions Application". It contains input fields for "User ID", "Password", and a dropdown for "Authorization Level". To the right of these fields are buttons for "Add", "Delete", "Undo All", "Save", and "Find...". Below the input fields is a table with the following data:

User ID	Password	Authorization Level	Last Used
pes-admin	*****	3	11/19/07 22:17:42 00:00:00 00:00:00

At the bottom of the dialog box is a "Close" button.

2. Select the user ID you want to remove; once highlighted, the information will auto-populate the fields.
3. Click the **Delete** button to remove the user.
4. Click the **Close** button once you have completed this process for each user you wanted to remove.

## Installing Updates

- EDS notifies providers of PES software updates in two ways:
  - The Florida Medicaid Bulletin
  - Remittance messages on the remittance voucher and Web portal messages in the Web portal
- Use the following steps to upgrade PES:
  1. Select **Tools > Get Upgrades** from the toolbar. Depending on the Web connection options you have selected, *Provider Electronic Solutions* connects to the network and returns one of two actions:
    - If an upgrade is available, the system automatically downloads the upgrade to your PC (continue to step 2).
    - If no upgrade is available, the system displays the message "No upgrades available to apply." No further action is necessary.
  2. Close *Provider Electronic Solutions*. Access the Provider Electronic Solutions folder on your desktop and double-click the Upgrade icon to install the upgrade to the application.

**NOTE:** You can also use the Get Upgrades option available from the PES toolbar if you unexpectedly experience difficulty in submitting claims, or if you have not used the software for an extended period of time

## Review

- All users must have the same level of security in PES.
  - True
  - **False**
    - You can choose to give users different levels of security when you create the user in Security > Security Maintenance.
- The following methods are available to notify you of PES upgrades (check all that apply):
  - **The Florida Medicaid Bulletin**
  - **Remittance messages on the remittance voucher**
  - **Web portal messages in the Web portal**
  - E-mail notices
    - You can also select **Tools > Get Upgrades** to check for the latest version.

## Summary

- Access PES from the desktop and from the Start menu
- Change your PES password in **Tools > Change Password**
- Add and remove users in Security Maintenance
- Upgrade PES from **Tools > Get Upgrades**

## Setting Up Personal Options

## Setting Up Personal Options

### Objectives:

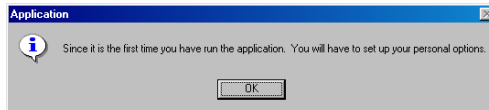
- Learn how to obtain your Trading Partner ID
- Learn about the four tabs available in

### **Tools > Options:**

- Connection
- Batch
- Payer/Processor
- Retention

## Setting Up Personal Options

### Obtaining a Trading Partner ID



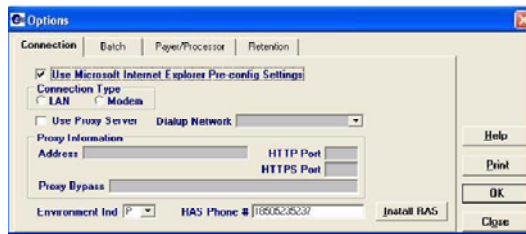
- The PES software requires a Trading Partner ID in order to submit electronic claims to Florida Medicaid
- New Florida Medicaid electronic submitters must call EDI to request a Trading Partner ID.
- You will not be able to use Provider Electronic Solutions (PES) to submit claims without this information
- After obtaining the Trading Partner ID, click the **OK** button to continue

## Options Menu

There are four tabs available in **Tools > Options**:

- **Connection** Use this tab to configure how to connect to the Medicaid Web site for claim submission.
- **Batch** Use this tab to set up a Trading Partner ID, web logon ID, password to log onto the Medicaid Web site, and the requester's contact information.
- **Payer/Processor** Use this tab to access your system's payer/processor information.
- **Retention** Use this tab to establish retention settings for archive days, batch information, verification information, logs, and password expiration.

## Connection Tab

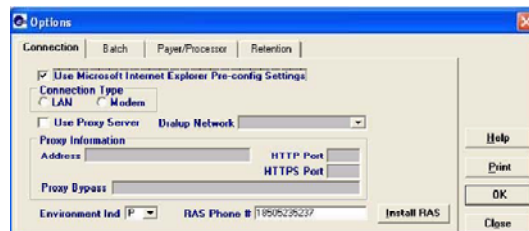


### Connection Options:

**Use Microsoft IE Pre-config Settings** - If checked, the pre-config settings within your Internet Explorer will be accessed to connect to the batch submission website.

- **Dialup Network** - If you choose the Modem Connection Type, you must select one of the Dialup Networks from the drop-down box. If you do not have an option listed, follow the instructions for the Install RAS button.

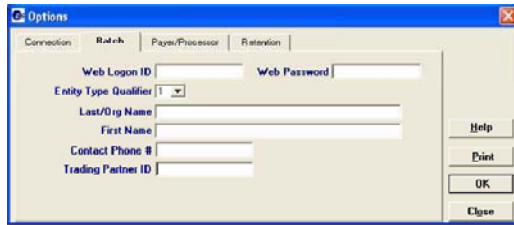
## Connection Tab



### Connection Options (continued):

- Environment Ind - Indicate if the submission is Production or Test. **Remember, if you have your indicator as Test your claims will not be paid.**
- RAS Phone # - If you use a dialup modem, enter 18505235237. If your phone service requires additional dialing features you may adjust this number to add those features (for example, dialing a "9" to get an outside line would be entered as: 9,18505235237).
- Install RAS - If you use a dial-up modem to connect to Medicaid, you must choose a Dialup Network option provided. If you have no option provided, click the **Install RAS** button and the option FL RAS will be available to you.

## Batch Tab



- **Web Logon ID** - Enter your Web Logon ID. If you are a first-time user of the secure Web portal, you will need to set-up your Web Logon ID and password. A PIN letter from EDS is required in order to get started. If you have not received a PIN letter, please call the EDS Provider Contact Center.
- **Web Password** - Enter your Web Logon Password. If you are a first time user of the secure Web portal, you will need to set-up your Web Logon ID and password. A PIN letter from EDS is required in order to get started. If you have not received a PIN letter, please call the EDS Provider Contact Center.
- **Entity Type Qualifier** - Choose the best value to indicate if the Trading Partner ID is associated with a person (qualifier 1) or non-person (qualifier 2).
- **Last/Org Name** - If the Trading Partner is a person, enter the last name. If the Trading Partner is a non-person, enter the organization's name.
- **First Name** - If the Trading Partner is a person, enter the first name.
- **Contact Phone #** - Enter the phone number of the Trading Partner. Only numerical characters are allowed (no dashes, no periods).
- **Trading Partner ID** - If you have a valid Florida Medicaid Trading Partner ID, continue using the same ID. If you need a new Trading Partner ID contact the EDI Helpdesk.

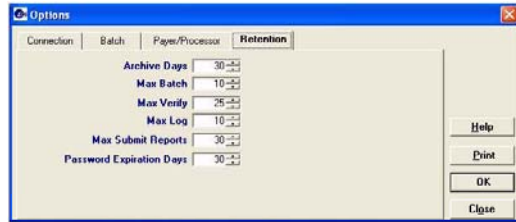
## Payer/Processor Tab

This tab contains your system's payer/processor information. The fields on this screen will populate automatically and **should not** be altered unless directed by EDS. A sample **Options** window displaying the **Payer/Processor** tab is shown below:



## Retention Tab

Users access the Retention tab to establish retention settings for archive days, batch information, verification information, logs, and password expiration. A sample **Options** window displaying the **Retention** tab is pictured below:



NOTE: Increasing the retention settings results in more data saved to your hard drive.

## Review

- Before you can use PES, you must obtain a Trading Partner ID. Previous users can find the Trading Partner ID in:
  - Tools > Options > Batch
  - Tools > Options > Retention
  - Tools > Options > Connection
    - Previous users can find the Trading Partner ID by selecting **Tools > Options > Batch** within the PES application.
- New users can find the Trading Partner ID:
  - In the same location as previous users
  - By calling 1 (800) 456-1242
  - On the [www.mymedicaid-florida.com](http://www.mymedicaid-florida.com) website
    - New users must call 1 (800) 456-1242 to receive a Trading Partner ID

## Summary

- How to obtain your Trading Partner ID from the **Batch** tab in **Tools > Options**.
- Complete your personal options on the following tabs found in **Tools > Options**:
  - Connection
  - Batch
  - Payer/Processor
  - Retention

Demonstration of  
the PES Software

## Navigating in PES







- The menu items on the PES toolbar:
  - File
  - Forms
  - Communication
  - Lists
  - Reports
  - Tools
  - Security
  - Window
  - Help
- The icons on the PES toolbar
  - Dental
  - Institutional Inpatient
  - Institutional Nursing Home
  - Institutional Outpatient
  - Professional
  - Exit
- Where to go for help

## Navigating PES Menus

This menu option...	Allows you to...
File	Exit from the application.
Forms	Select the online form that you wish to work with.
Communication	Submit batches of forms and process batch responses. Resubmit batches of forms. View Communication Log files.
Lists	Add and edit reference lists, which allow you to collect information to be auto-populated in online forms.
Reports	Print summary or detail reports with information from forms or reference lists.
Tools	Create and work with archives, perform database maintenance, and change your options. The Options selection allows you to set up communications options and determine retention settings.

## Navigating PES Icons

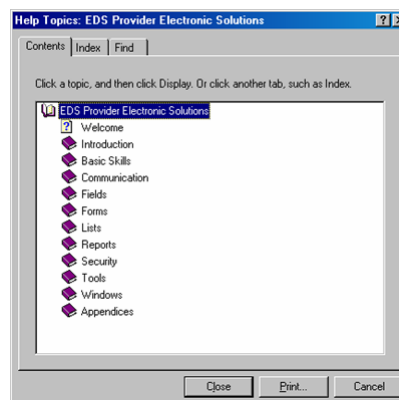
Icons on the PES Toolbar appear as follows:

 837 Dental	 837 Institutional Outpatient
 837 Institutional Inpatient	 837 Professional
 837 Institutional Nursing Home	 Exit

## Getting Help

### Where do I go for help?

- Field-level help is available within the PES software.
- You can access help for any field in *PES* simply by positioning your cursor in the field and pressing the <F1> function key usually located at the top of your keyboard.
- The Help Feature in PES was built on X12 guidelines not FL Medicaid Policy. Please refer to the PES billing guides and coverage and limitations manuals for billing information.



## Summary

- Install PES software
- Navigate through PES
- Complete Florida Medicaid required fields to create and send original, adjusted, or voided claims
- Submit claims using PES
- How to access help

## Customizing PES

## Navigating in PES

In this lesson, you will learn how to:

- Use and build lists
- Add a new provider, recipient, and policy holder

## Using Lists

*Provider Electronic Solutions* contains reference lists of information that you commonly use when you enter and edit forms, for example:

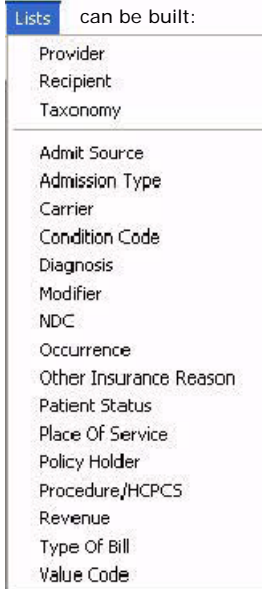
- common diagnosis codes
- provider numbers
- patient IDs

After saving the list information, the lists are available as a drop-down list where you can select data to speed the data entry process and help ensure the accuracy of the form. Building a list can also increase your ability to submit correct claims quickly and efficiently.

## Building Lists

- There are two ways to build lists:
  - Accessing list windows through the **List** menu
  - Double-clicking certain fields while you are completing a claim form or entering an eligibility verification transaction.
- You can build lists as a separate task, or build (add) to them as you submit claims.

The following lists can be built:



## Adding a New Record to a List

To Add a New Record to a List:

1. Select the **List** menu from the toolbar. To add a record, select the list by clicking it.
2. Enter information into all required fields.
3. Click the **Save** button. NOTE: The system returns error messages if the record contains errors. Double-click each error to access the field on the record that contains the error.
4. Correct any mistakes and click the **Save** button.
5. Click the **Add** button to add another record.

## Adding a New Provider

To Add a New Provider to a List:

1. From the toolbar, select **List > Provider**.
2. Key information into all required fields.
3. A sample Provider list dialog box is shown below:

Provider ID	Taxonomy	Last/Org Name	Type Qualifier
-------------	----------	---------------	----------------

4. Click the **Save** button; the system returns error messages if the record contains errors.
5. Double-click each error to access the field on the record that contains the error; correct the mistake(s) and click the **Save** button.
6. Click the **Add** button to add another record.

## Adding a New Recipient

To Add a New Recipient:

- From the toolbar, select **List > Recipient**.
- Key information into all required fields.
- A sample Recipient list dialog box is shown below:

Recipient ID	Last Name	First Name
--------------	-----------	------------

- Click the **Save** button; the system returns error messages if the record contains errors.
- Double-click each error to access the field on the record that contains the error; correct the mistake(s) and click the **Save** button.
- Click the **Add** button to add another record.

## Adding a New Policy Holder

The Policy Holder list allows you to collect detailed information about a recipient's third party insurance that can then be automatically entered into forms.

To Add a New Recipient:

1. From the toolbar, select **List > Recipient**.
2. Key information into all required fields.
3. A sample Recipient list dialog box is shown below:

4. Click the **Save** button; the system returns error messages if the record contains errors.
5. Double-click each error to access the field on the record that contains the error; correct the mistake(s) and click the **Save** button.
6. Click the **Add** button to add another record.

Provider Electronic Solutions Software

/// 57 / 8 January 2009



## Review

- Lists are available for some fields on your forms. After creating a list, it is available as:
  - A check box on your form
  - A drop-down list on your form
  - A link on your form
    - That's right! After saving the list information, the list appears as a drop-down list on your form
- The following can be added to a list:
  - A new provider
  - A new recipient
  - A new policy holder
  - All of the above
    - Providers, recipients, and policy holders can be added to a list.

Provider Electronic Solutions Software

/// 58 / 8 January 2009



EDS  
5400 Legacy Drive  
Plano, TX 75024  
+ 1 972 605 6000 (optional)  
[first.lastname@eds.com](mailto:first.lastname@eds.com) or [eds.com](http://eds.com)

EDS and the EDS logo are registered trademarks of Electronic Data Systems Corporation. EDS is an equal opportunity employer and values the diversity of its people. © 2007 Electronic Data Systems Corporation. All rights reserved.

/// 59 / 8 January 2009

