

This document provides additional information to setup the PC-ACE software used for Durable Medical Equipment (DME) transactions exchanged with CEDI.

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PC-ACE is designed for both Institutional (Medicare Part A or hospital/home health/hospice claims) and Professional (Medicare Part B or office visits, and Durable Medical Equipment or DME) billing. Since this is a DME support document, we will not be covering Medicare Part A or Part B functions.

This document is intended as a help guide for setting up the PC-ACE software. It is not intended to replace the help functions within the PC-ACE software (general help is accessible by using the F1 key and specific item help is accessible by right-clicking or using the F2 key on the specific item) or the PC-ACE User Manual itself. For assistance with questions not covered in this document, please consult the aforementioned PC-ACE help options.

When you start PC-ACE, many of the menu options will require you to sign on. Once you sign on for one item, it will not prompt you to sign on again unless you either close the program or select **Logout Current User** from the **Security** menu item.

The sign on information can be found in the PC-ACE Readme File downloaded with the full install of the PC-ACE software.

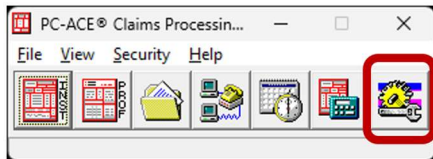
Please refer to the PC-ACE User Guide for more sign on information. The PC-ACE User Guide can be found on the CEDI Web site <https://www.ngscedi.com/>.

The current version is listed on the CEDI Web site at <https://www.ngscedi.com/>. To find out what version you are running, select **Help** from the PC-ACE main menu, and drop down to **About PC-ACE**.

Backing Up PC-ACE

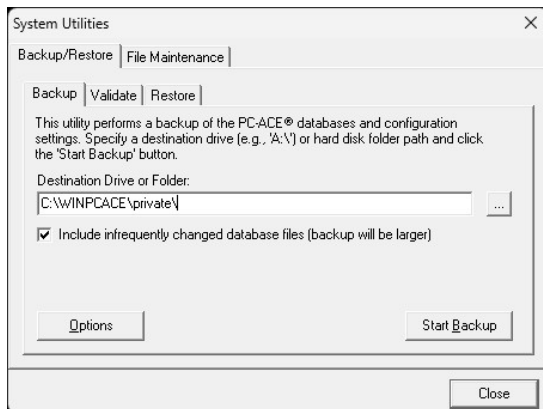
- PC-ACE will automatically ask you to make a backup every time you exit the software, unless you had already selected to do a backup before exiting. It is recommended that a backup be done on a regular schedule, i.e. daily or weekly.
- **Always make a backup before updating the software to a new version.**
- Do not restore a version of PC-ACE older than the one currently in use on your computer as this will cause problems.
- When moving from one computer to another, it is always best to make sure both computers have the same version of PC-ACE before making and restoring backups.
- Use the F1 help document for further instructions.

In order to make a backup copy of PC-ACE, select **System Utilities** from the PC-ACE main menu.



The **Systems Utilities** menu will open to select the location where a backup will be saved. The button with three dots opens a general Windows browse dialogue box to select a location. This is a folder location only – the file name will be set by the software.

PC-ACE cannot backup files directly to a USB flash drive. To copy your files to a flash drive, save them directly to your computer and then copy the files to the flash drive.



Once you have chosen a location, select **Start Backup**. It will tell you when it has completed successfully.

Select **Close** to return to the PC-ACE Main Menu.

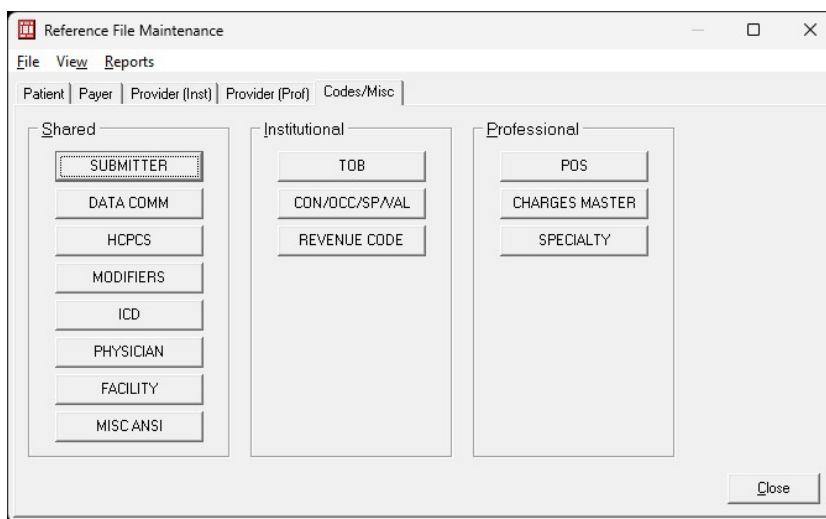
Note: To restore a backup copy of PC-ACE, return to this same area of the software and select the **Restore** tab.

Setting up a Submitter ID

To enter submitter information, select **Reference File Maintenance** from the PC-ACE main menu.

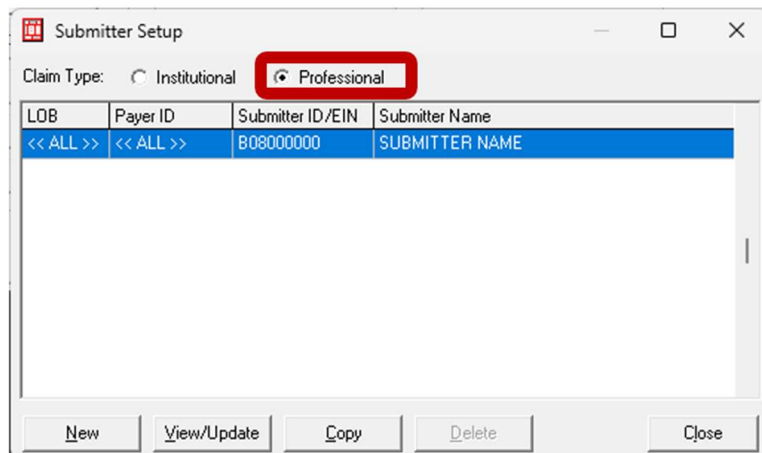


Select the **Codes/Misc** tab.

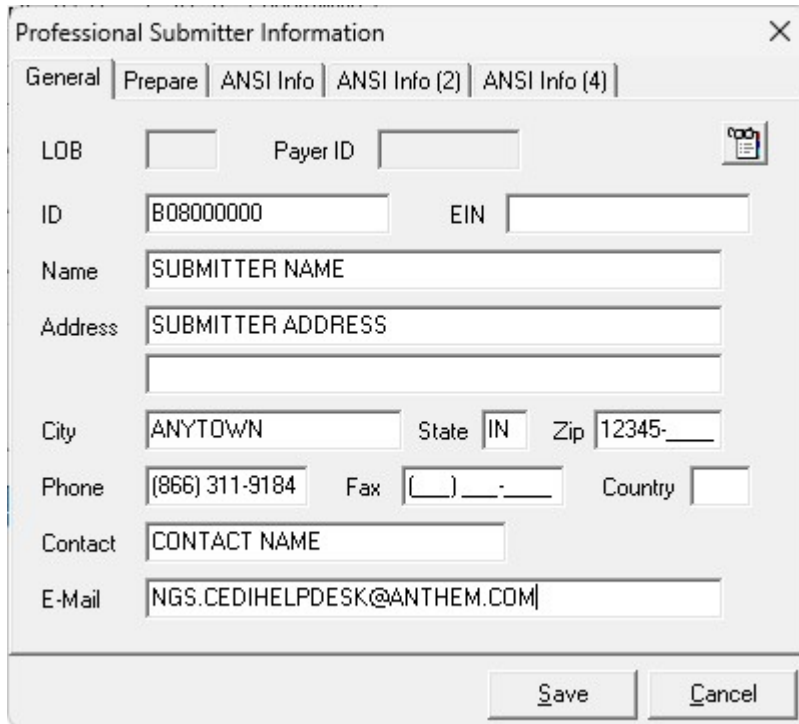


Select the **Submitter** option to enter the Submitter ID (Trading Partner ID) assigned by CEDI and other submitter information.

On the **Submitter Setup** screen, select the **Professional** radio button.



Select the **View/Update** button.



The Professional Submitter Information screen has several tabs. Only information on the **General** tab will need to be updated with your CEDI submitter information.

LOB: This is left blank.

Payer ID: This is left blank.

ID: Enter the Submitter ID assigned to you by CEDI. This number should start with an A, B, C, or D. It is also called a Trading Partner ID.

EIN: This is left blank.

Name: Enter the submitter name enrolled with CEDI.

Address: Enter the physical address location for the submitter/Trading Partner.

Phone/Fax: Enter the phone and fax number for the submitter/Trading Partner.

Contact: Enter the contact person.

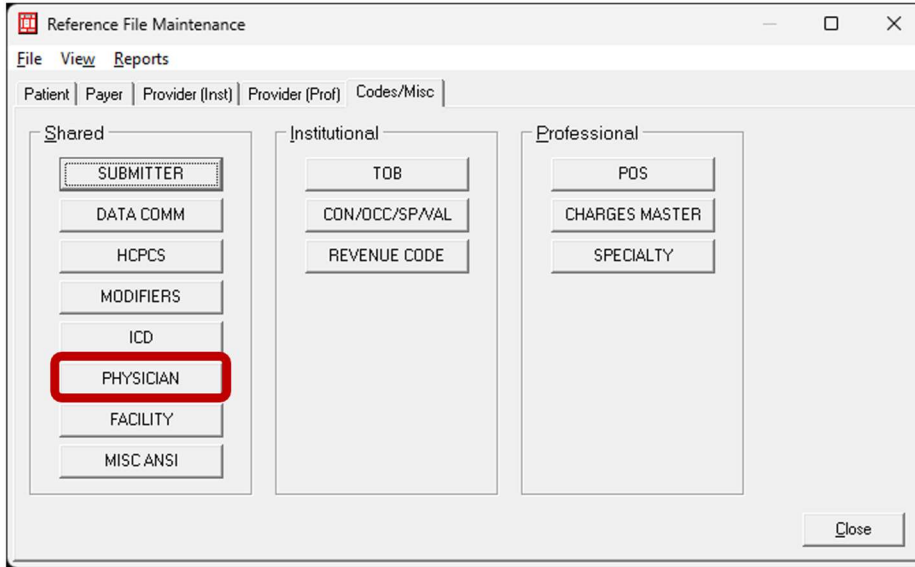
Country: This is left blank.

The other tabs will only be used when instructed to by CEDI technical support.

Select **Save** and **Close** to return to the **Codes/Misc** menu.

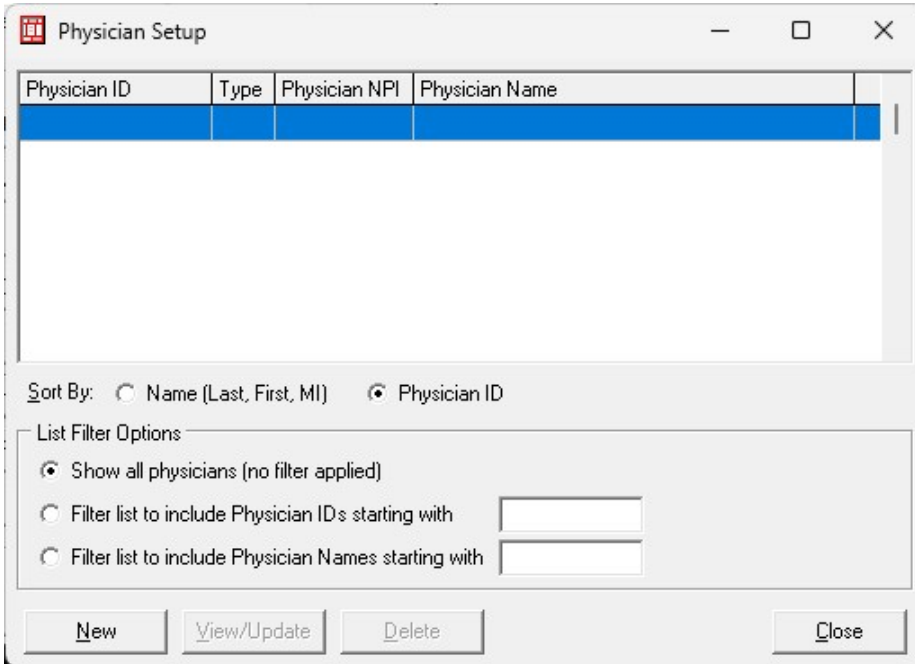
Setting up Ordering Provider Information

To enter ordering provider information, under **Reference File Maintenance**, select the **Codes/Misc** tab.



The screenshot shows the 'Reference File Maintenance' window with the 'Codes/Misc' tab selected. The window is divided into three columns: 'Shared', 'Institutional', and 'Professional'. The 'Shared' column contains buttons for SUBMITTER, DATA COMM, HCPCS, MODIFIERS, ICD, **PHYSICIAN** (highlighted with a red rectangle), FACILITY, and MISC ANSI. The 'Institutional' column contains buttons for TOB, CON/OCC/SP/VAL, and REVENUE CODE. The 'Professional' column contains buttons for POS, CHARGES MASTER, and SPECIALTY. A 'Close' button is located at the bottom right.

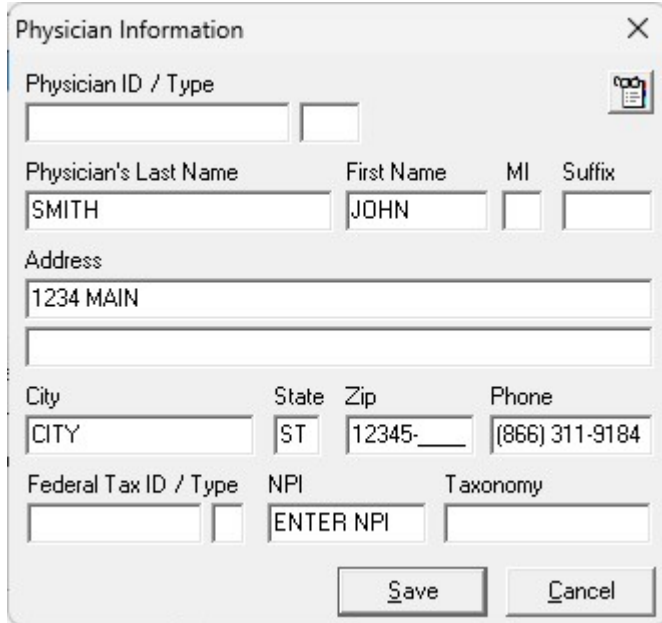
Select the **Physician** button to setup Ordering Providers. For DME, every charge line must have an Ordering Physician with an NPI indicated.



The screenshot shows the 'Physician Setup' window. It features a table with the following headers: Physician ID, Type, Physician NPI, and Physician Name. Below the table, there are 'Sort By' options: 'Name (Last, First, MI)' and 'Physician ID' (selected). Under 'List Filter Options', there are three radio buttons: 'Show all physicians (no filter applied)' (selected), 'Filter list to include Physician IDs starting with' (with an empty text box), and 'Filter list to include Physician Names starting with' (with an empty text box). At the bottom, there are buttons for 'New', 'View/Update', 'Delete', and 'Close'.

Select **New** to add an Ordering Provider.

Physician Information for the Ordering Provider:



Physician ID / Type: This is left blank.

Physician's Name: Enter the Physician's name in the relevant fields.

Address: The address and telephone number should be entered for the physician.

Federal Tax ID/Type: This is left blank.

NPI: Enter the physician's NPI. (PC-ACE will validate the NPI.)

Select **Save** when finished.

Repeat as needed to add more Ordering Providers.

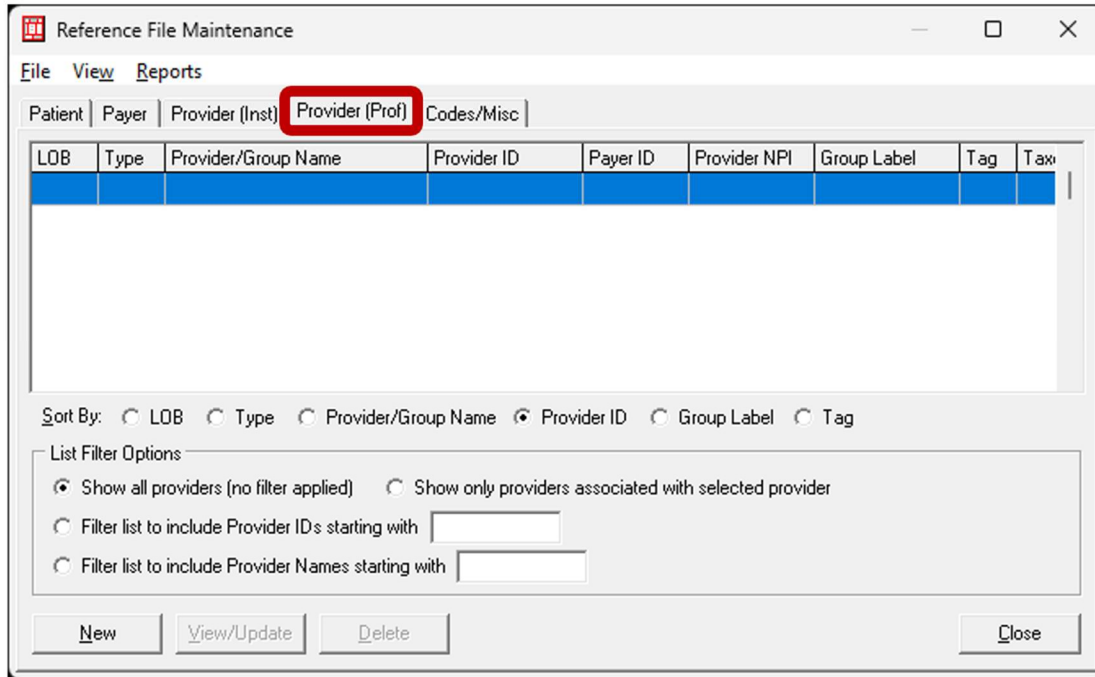
Select **Close** when finished to return to the **Codes/Misc** menu.

Some of the other options on the **Codes/Misc** tab are maintained by the software developers and are used for entry of data later.

Note: If you need to enter facility information, it can be stored under the **Codes/Misc** tab using the **Facility** option.

Setting up the Billing Provider

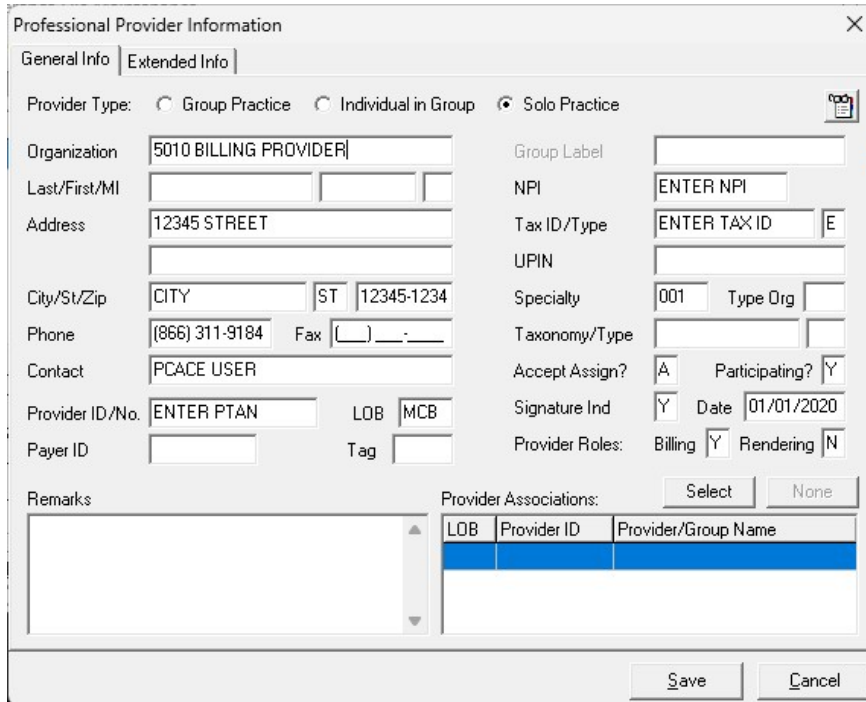
Select the **Provider (Prof)** tab on the **Reference File Maintenance** menu to enter the billing provider/supplier information.



The screenshot shows the 'Reference File Maintenance' window. The 'Provider (Prof)' tab is selected and highlighted with a red box. The window contains a table with the following columns: LOB, Type, Provider/Group Name, Provider ID, Payer ID, Provider NPI, Group Label, Tag, and Tax. Below the table, there are 'Sort By' options (LOB, Type, Provider/Group Name, Provider ID, Group Label, Tag) and 'List Filter Options' (Show all providers (no filter applied), Show only providers associated with selected provider, Filter list to include Provider IDs starting with, Filter list to include Provider Names starting with). At the bottom, there are buttons for 'New', 'View/Update', 'Delete', and 'Close'.

Select **New** to add a new supplier.

Professional Provider Information:



- Provider Type:** All DME billing providers should be marked as **Solo Practice**.
- **Group** and **Individual in Group** are used for Medicare Part B but not for DME.
- Organization/ Name:** Enter the billing provider's name either as a group under organization or individual under the name fields.
- Address:** Enter the billing provider's address information.
- Note:** The address must be a physical location address and you must enter the full nine-digit ZIP Code in this field.
- Phone/ Fax:** Enter the billing provider's phone and fax numbers.
- Contact:** Enter the contact person.
- Provider ID/No:** Enter the billing provider's DME Provider Transaction Access Number (PTAN) assigned by the National Provider Enrollment Eastern Region (NPEAST) or Western Region (NPWEST).
- PC-ACE requires this to be entered, but it is not sent in claim files in compliance with HIPAA regulations.
- Payer ID:** CEDI will route the claims to the correct payer based on patient address so any of the following Payer IDs may be used.

- 16013 for Jurisdiction A
- 17013 for Jurisdiction B
- 18003 for Jurisdiction C
- 19003 for Jurisdiction D

Note: When claims are prepared for submission, only one Medicare Payer can be selected at a time. **Either**

- Select one Medicare DME Payer ID for all patients and provider regardless of the DME MAC jurisdiction where the patient resides. This will allow you to send all Medicare DME claims in one transmission **Or**
- Select the proper Medicare Payer ID for the DME MAC jurisdiction where the patient resides. This will force you to prepare separate submissions for each jurisdiction.

NPI: Enter the billing provider's National Provider Identifier (NPI).

- PC-ACE will validate the NPI is in a valid format.

Tax ID/Type: Enter the billing provider's Tax ID or the Social Security Number that is on file with the NPEAST or NPWEST.

The **Type** will either be **E** or **S**

- **E** indicates this number is a Tax ID
- **S** indicates this number is a Social Security Number.

UPIN: This is left blank. UPIN numbers are no longer sent in DME claims.

Specialty: Use the right-click or F2 lookup features to select the option that is most appropriate.

Type Org: This is left blank.

Taxonomy/Type: This field is optional. The taxonomy code is not used in DME Medicare claims but may be required by a secondary insurance.

The remaining fields may be completed using the right-click or F2 lookup feature.

Note: Some items will not let you click out of them without making a selection and some will not allow you to save the provider information without making a selection. In this latter case, a warning box will pop up and the item in error will start flashing to draw your attention to where you need to make a correction.

The **Extended Info** tab will not be needed unless you are directed to enter information here by CEDI technical support.

Select **Save** to save the billing provider information.

Setting up Payers (Insurances)

The **Payer** tab on the **Reference File Maintenance** menu is used to set up the insurances that will be used in the software.

By default, all Medicare Payer IDs that are valid for this build of PC-ACE are listed here.

Reference File Maintenance

File View Reports

Patient Payer Provider (Inst) Provider (Prof) Codes/Misc

Payer ID	LOB	Description	State	Usage
14412	MCB	MEDICARE PART B - RI		Prof Only
14512	MCB	MEDICARE PART B - VT		Prof Only
16013	MCB	DME MAC JURISDICTION A		Prof Only
17013	MCB	DME MAC JURISDICTION B		Prof Only
18003	MCB	DME MAC JURISDICTION C		Prof Only
19003	MCB	DME MAC JURISDICTION D		Prof Only

Sort By: ☒ Payer ID ☐ Payer Description ☐ Payer LOB ☐ Payer State

List Filter Options

☒ Show all payers (no filter applied)

☐ Filter list to include Payer IDs starting with

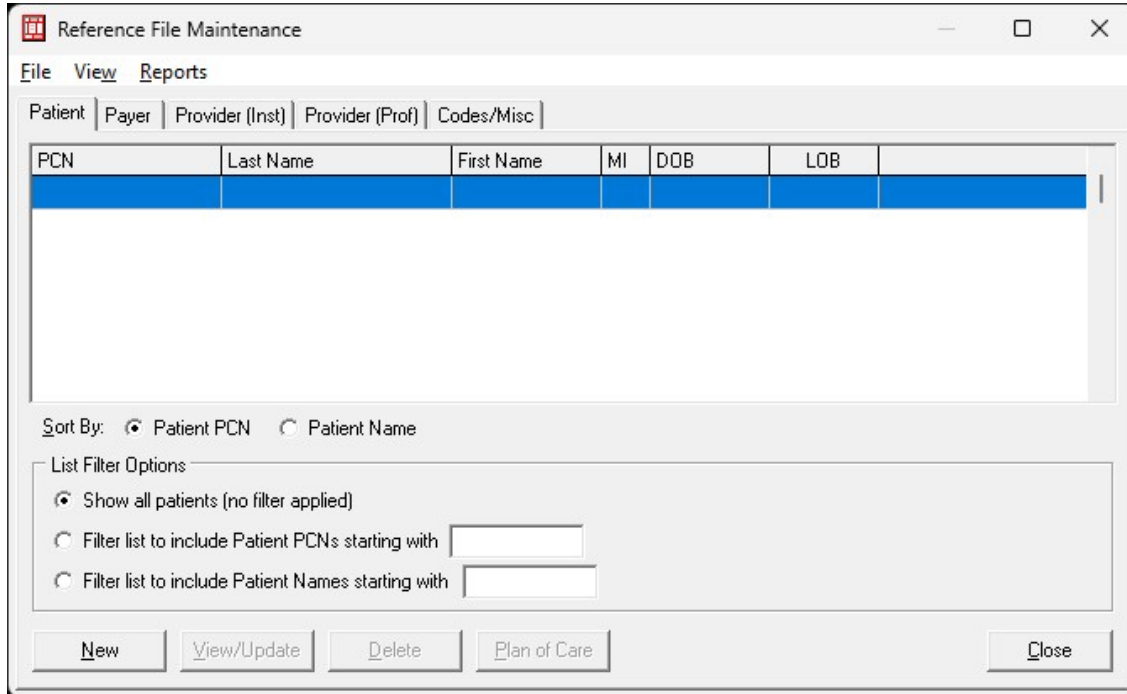
☐ Filter list to include Payer Names starting with or containing

If you need to add non-Medicare insurance for Coordination of Benefits (COB) or Medicare as Secondary Payer (MSP) purposes, select **New** to add the payer ID.

Note: More information about entering Secondary Insurances are included in the PC-ACE Secondary Insurance document located on the CEDI Web site <https://www.ngscedi.com/>.

Setting up Patient Information

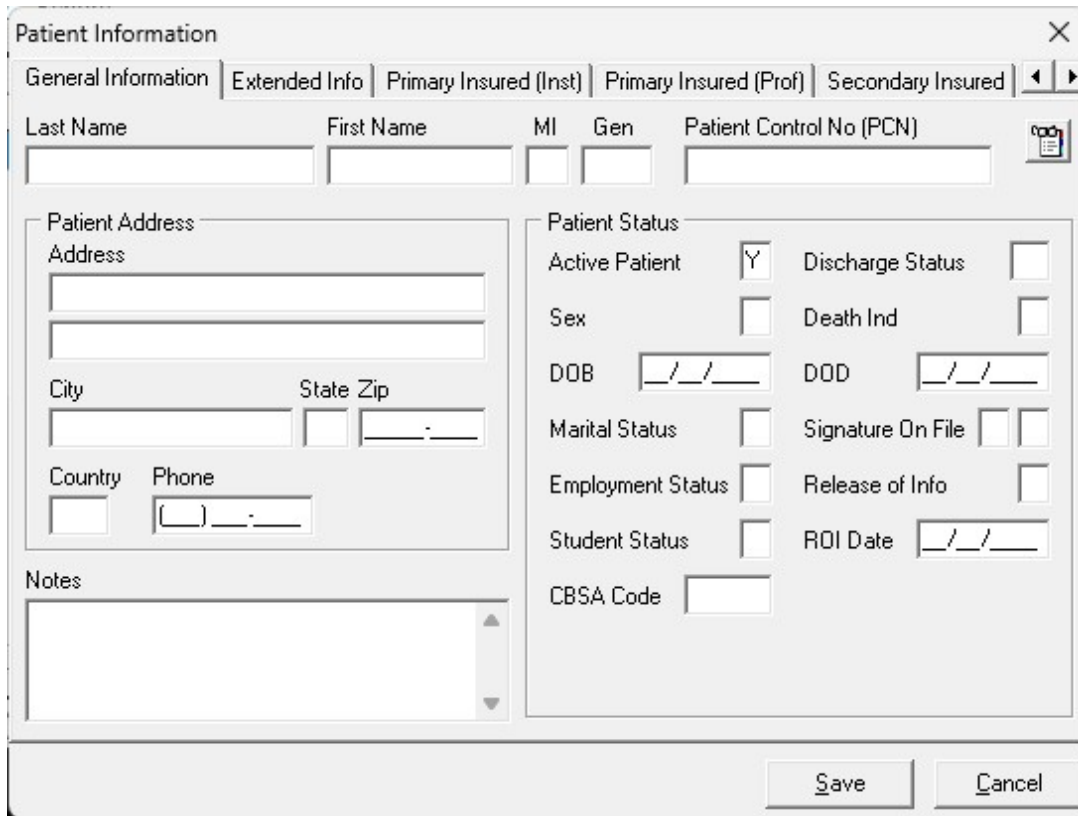
The **Patient** tab of the **Reference File Maintenance** menu is where patient information is added.



The screenshot shows the 'Reference File Maintenance' window. It has a menu bar with 'File', 'View', and 'Reports'. Below the menu bar is a tabbed interface with 'Patient', 'Payer', 'Provider (Inst)', 'Provider (Prof)', and 'Codes/Misc'. The 'Patient' tab is active, displaying a table with columns: PCN, Last Name, First Name, MI, DOB, LOB, and an empty column. The table is currently empty. Below the table, there is a 'Sort By' section with two radio buttons: 'Patient PCN' (selected) and 'Patient Name'. Below that is a 'List Filter Options' section with three radio buttons: 'Show all patients (no filter applied)' (selected), 'Filter list to include Patient PCNs starting with' (with an empty text box), and 'Filter list to include Patient Names starting with' (with an empty text box). At the bottom of the window are five buttons: 'New', 'View/Update', 'Delete', 'Plan of Care', and 'Close'.

Select **New** to add a new patient.

General Information tab:



The screenshot shows a 'Patient Information' window with a 'General Information' tab selected. The form contains the following fields and sections:

- General Information** (selected tab): Last Name, First Name, MI, Gen, Patient Control No (PCN).
- Patient Address**: Address (two lines), City, State, Zip, Country, Phone.
- Patient Status**: Active Patient (Y/N), Discharge Status, Sex, Death Ind, DOB, DOD, Marital Status, Signature On File, Employment Status, Release of Info, Student Status, ROI Date, CBSA Code.
- Notes**: A large text area for patient notes.
- Buttons**: Save, Cancel.

Right click or use the F2 key for lists of options in many of these fields.

Make sure the patient's name is entered exactly as it appears on the patient's Medicare ID card.

Patient Control Number is an ID number assigned by the provider or submitter.

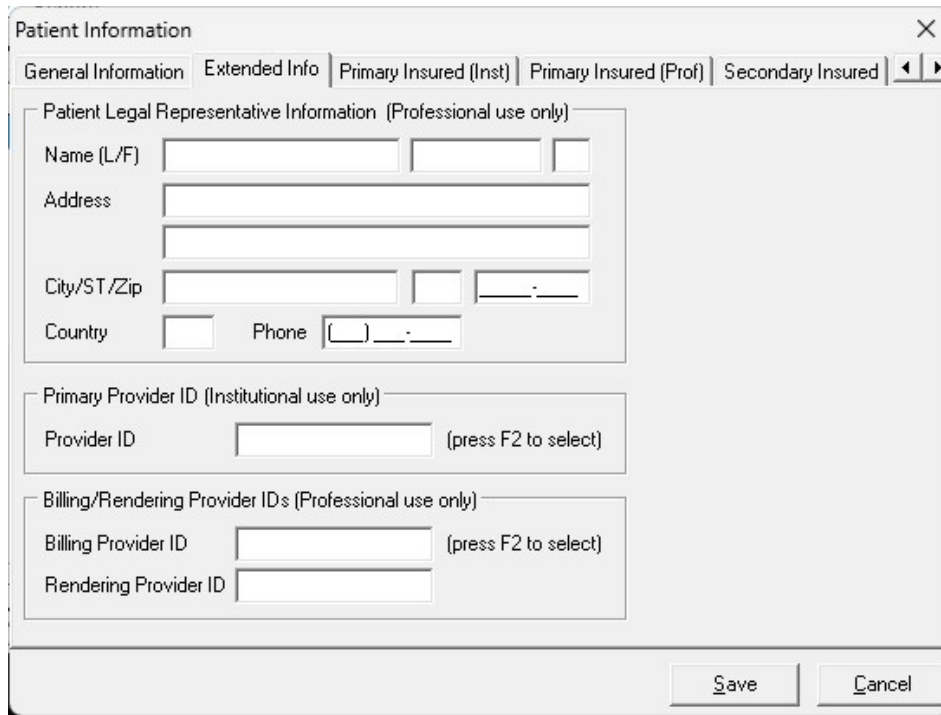
There are two boxes by **Signature on File**.

- The first box is for Medicare Part A Institutional claims and will be blank.
- The second box is for DME and Medicare Part B Professional. Right click or use the F2 key to get the list of valid values.

Release of Info has several options listed on its right click/F2 lookup list. Only "I" or "Y" are valid for DME. Any other entries will result in CEDI front end rejections.

Note: Some fields may not be required. Only enter information if it applies to this patient.

Extended Info tab:



The screenshot shows a 'Patient Information' dialog box with the 'Extended Info' tab selected. The dialog has a title bar with a close button (X). Below the title bar are five tabs: 'General Information', 'Extended Info' (selected), 'Primary Insured (Inst)', 'Primary Insured (Prof)', and 'Secondary Insured'. The 'Extended Info' tab contains three sections: 'Patient Legal Representative Information (Professional use only)' with fields for Name (L/F), Address, City/ST/Zip, Country, and Phone; 'Primary Provider ID (Institutional use only)' with a 'Provider ID' field and a '(press F2 to select)' prompt; and 'Billing/Rendering Provider IDs (Professional use only)' with 'Billing Provider ID' and 'Rendering Provider ID' fields, each with a '(press F2 to select)' prompt. At the bottom right are 'Save' and 'Cancel' buttons.

Patient Legal Representative Information: This field should only be filled out when the patient is legally represented by someone else. For example, this would be the name of the person who has power of attorney.

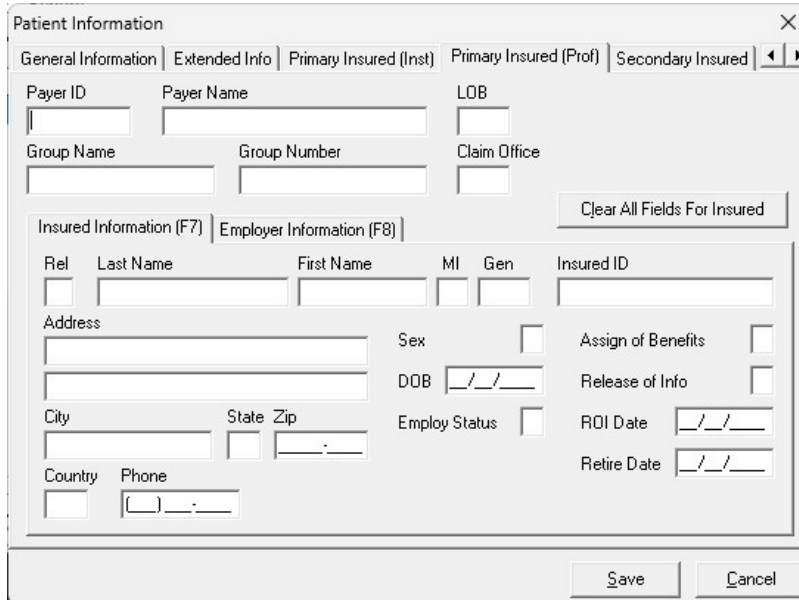
Primary Provider ID (Institutional use only): This is not used for DME and will be left blank.

Billing/Rendering Provider IDs (Professional use only):

- **Billing Provider ID** is where you can indicate which supplier is most likely the one this patient will have claims for. This will save time during claims entry.
- **Rendering Provider ID** is left blank – this is for Medicare Part B (office visit) claims, not DME.

Primary Insured (Prof) tab:

Right-click or hit the F2 key to select the primary payer. This should fill in the Payer ID, Payer Name, and LOB (Line of Business) fields.



Payer ID: When claims are prepared for submission, only one Medicare Payer can be selected at a time. Either

- Select one Medicare DME Payer ID for all patients regardless of the DME MAC jurisdiction where the patient resides. This will allow you to send all Medicare DME claims in one transmission
- Select the proper Medicare Payer ID for the DME MAC jurisdiction where the patient resides. This will force you to prepare separate submissions for each jurisdiction

Group Name and **Group Number:** These are only entered if they are indicated on the patient's insurance ID card – these are left blank for Medicare.

Claim Office: This will most likely be blank unless indicated on the insurance ID card.

Insured Information (F7):

Rel: Select the relationship of the patient to the insured party.

- For Medicare, this is always **18 – Self**. This will fill out the rest of the information.
- Use the right-click or F2 lookup function to make the appropriate choice.

Insured ID:

- For Medicare, this is the field for the Medicare ID number. It must match the information on the patient's Medicare ID card exactly.

If the patient has a secondary insurance, the insured party will be added on the **Secondary Insured** tab. For DME patients, secondary insurance information will need to be entered under **Secondary Insured (Prof)**.

For more information about entering secondary insurances or Medicare as a secondary payer, please refer to the PC-ACE help documents and the PC-ACE User Guide on the CEDI Web site <https://www.ngscedi.com/>.

Medicare does not allow tertiary insurance claims so this tab should be left blank.

The PC-ACE software should now be setup to start entering claim information. For more information about entering claims into the PC-ACE software, please refer to the PC-ACE help documents and User Guide on the CEDI Web site <https://www.ngscedi.com/>.

Option for Electronic Remittance Advice

This option is for Trading Partners/Submitters who download 835 Electronic Remittance Advice (ERA) files from the CEDI Gateway or CEDI Claims Portal. If you receive paper remits, you will not need to complete this step.

The Medicare Remit Easy Print (MREP) software is available to print the ERA and can be downloaded from the CEDI Web site <https://www.ngscedi.com/>.

Downloading Medicare Remit Easy Print:

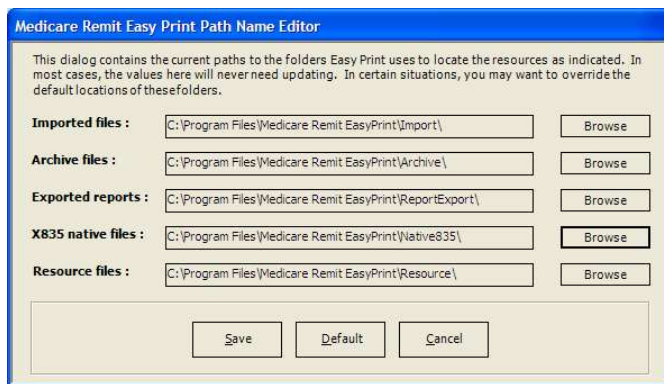
- Select the Medicare Remit Easy Print Software Download. This will direct you to the Centers for Medicare & Medicaid Services webpage for Medicare Remit Easy Print.
- Under the Downloads section, you will want to select the link for *Medicare Remit Easy Print – Version (current version) [ZIP, 1MB]*

Note: The user manual and download instructions are also listed under the downloads section.

Setting Up Medicare Remit Easy Print:



- Open the **Medicare Remit Easy Print** using the shortcut/icon on your desktop. This should appear after the download and installation are completed. If the icon does not appear on your desktop, check the All Programs list under the Start Menu on your computer.
- Select **Tools** and **Path Name Editor**



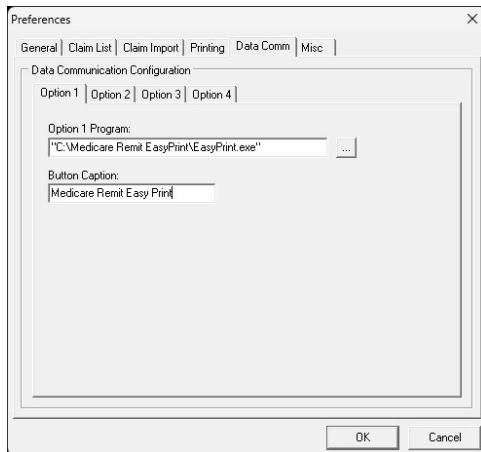
- Select the **Browse** option for “X835 native files”.
- You will need to create a folder to download your CEDI reports and ERAs after transmitting the DME claims files. The folder can be created prior to entering the Medicare Remit Easy Print program or while you are browsing for the folder.
- Select this folder.

- Select **OK** and **Save**

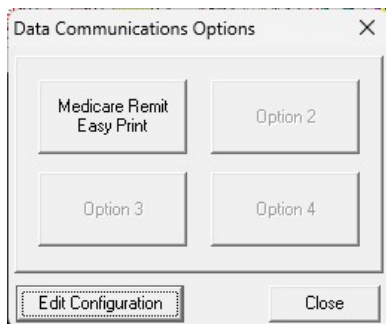
When importing Medicare ERAs, the software should now allow you to view the new folder.

If you would like to link your Medicare Remit Easy Print software to open through the PC-ACE software, follow the directions below. You do not need to complete this step if you choose to open the Medicare Remit Easy Print software by using the icon on your desktop.

- Open the **Data Communications Menu** in the PC-ACE software. (This is the option showing the two computers connected by a telephone.)
- Select **Edit Configuration**.
- Select the **Option** tab that you would like to use for the Medicare Remit Easy Print program. (For this example, Option 1 is selected.)



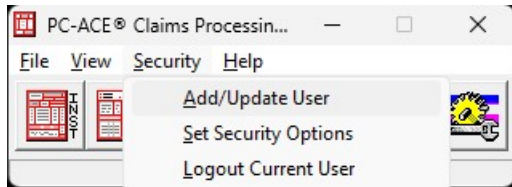
- Use the ... button to select the Medicare Remit Easy Print file **EasyPrint.exe**.
 (This is located under the Local Disk (C:) drive, Program Files, Medicare Remit Easy Print. This is what it should look like C:\Program Files\Medicare Remit EasyPrint\EasyPrint.exe)
- Under **Button Caption**, enter **Medicare Remit Easy Print**.
- Select **OK**.
- Your **Data Communications Menu** should now show Medicare Remit Easy Print as an option. **Note:** Other options may be used for other functions.



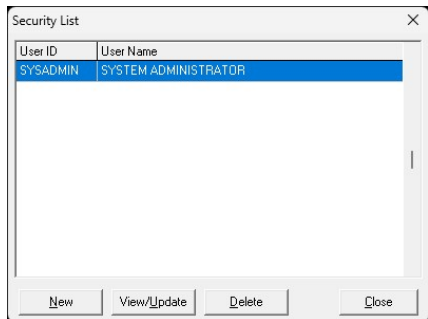
Set Up User Accounts

User accounts can be set up for people who will be accessing PC-ACE for the purpose of entering and sending claims, adding patients, reviewing claims that have already been sent, etc.

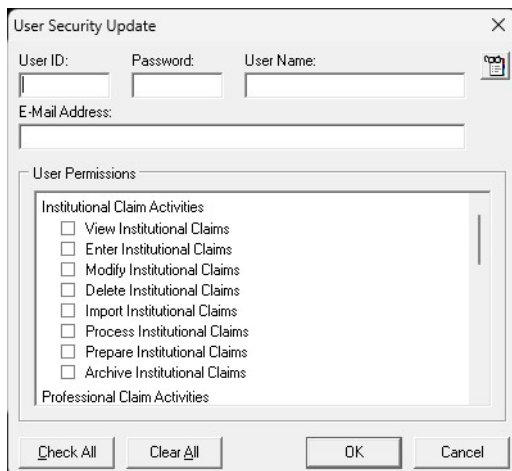
Select **Security** from the PC-ACE main menu.



Select **Add/Update User** to access the **Security List** screen:



Select **New** to add a new user.



Enter the user information as appropriate.

Be sure to scroll down and allow access to everything the user will need to conduct business.

Select **OK**.

Repeat for additional users, or select **Close** to return to the PC-ACE main menu.