

## PES Quick Reference

- **To Get an Account**

To get an account go to [www.vtmedicaid.com](http://www.vtmedicaid.com) and click on Downloads and then click on HIPAA Tools. Click on and print EDI Registration and Trading Partner Agreement. Fill out both documents and mail them to us (both documents require signatures). We will set up an account and mail the account information back to you.

- **To Add Provider to an Existing Account**

Click on and print EDI Registration from the web site [www.vtmedicaid.com](http://www.vtmedicaid.com) under Downloads, HIPAA Tools. Fill out parts 1a and 1b on the first page. On the second page enter your Trading Partner ID and the provider name and number for each provider you want to add to your account. Make sure you get provider signatures. If you bill under a group, only the group number needs to be entered. Mail the Registration with original signatures to EDS, Attention EDI.

- **Basic Steps for PES Start-Up**

**Note:** You must receive your account information from EDS EDI prior to completing these steps.

- a. Print PES User's Guide (found on web site under Downloads, Software)
- b. Download Software
- c. Sign On
- d. Fill out Defaults (Tools, Options)
- e. Enter Lists (Provider and Client)
- f. Create Claims
- g. Submit Claims
- h. Retrieve Verification Files
- i. Send note saying you submitted test and include your Trading Partner ID

- **Upon Successful completion of Test**

- j. You will receive an email with instructions for cutting over to production
- k. After you are in production, resubmit, or copy and submit the claims you submitted for test if you want to get paid for them (claims sent to the test system will not be paid)

- **PES Helpful Hints**

- Set up

Tools/Options – This screen appears when you first log on. You can get back to it by clicking on Tools/Options. Follow the PES User's guide for filling in this information. Keep in mind that your Web Userid is the same as your Trading Partner ID. Also you must fill in the Modem tab even if you have high speed connection. For high speed connection, put the cursor on Modem Type, type the letter "g" then scroll down to Generic Configuration for Most Modems. Make sure that the Web and Carrier

tabs both point to test if you are testing or both point to production if you are submitting claims for payment

Lists - Click on Lists/Provider to add provider information prior to filling out claims. Click on Lists/Client to fill in client information prior to filling out claims.

Adding NPI – Provided you are on PES version 2.19 or greater, click on Lists/Provider. Click on the drop down in the field “Provider ID/NPI Code Qualifier”. Change the “1D” to “XX”. You can now enter a ten digit NPI in the field labeled “Provider ID/NPI”. ...Also, make sure the taxonomy you enter in the list is the one you reported to EDS. You can verify this by logging onto [www.vtmedicaid.com](http://www.vtmedicaid.com) under Transaction Services, Production Login and looking up your information in the Provider NPI file.

- Use

F1 Key – Use the F1 key when filling out claim or list information to see the type of information that goes in the field where your cursor is placed

Errors – When you try to Save a claim, you might get a list of errors. Clicking on an error will take you to the field that needs to be entered or corrected.

Correcting Entries – If you update your list while working on a claim, you need to make sure you refresh the data. The easiest way is to pick a different item from the list (eg. A different client), then go back and pick the item you want. That will assure you are bringing in the updated data. Save your claim when finished. **Note:** If claim or correction information is not handy, you can save the claim as incomplete and come back to it later.

Copying claims – Click on the Forms you use. Highlight the claim. You will get a message saying you can't work with claims in F status (presuming it was a submitted claim). Click OK. Click Copy. Click Save. Now the claim appears in R status at the top of the list. You can edit and save as needed and that claim will be sent the next time you submit your claims.

PES Version – To see what version of PES you are running, logon to PES, then click Help, About.

202 Error (see Passwords)

203 Error (see Passwords)

- Passwords

Web – If your PES submission fails and your Communication Log gives you an error code of 203 (password expired) or 202 (Web and PES passwords don't match) then: Go to [www.vtmedicaid.com](http://www.vtmedicaid.com). Click Transaction Services. Click Production Logon (unless you are still in Test in which case you would click User Acceptance). Logon and/or update your password if required. See “PES Internal” next. **Note:** Your web password expires every 60 days.

PES Internal – The PES password found under Tools/Options on the Batch tab (**NOT** Change Password) must match the web password. *After* making sure you can log on to the web, Logon to PES. Click Tools/Options. Highlight and delete the password field. Enter the

password you used to logon to the web. Click Save. You should now be able to submit your claims.

PES Logon – This is the password to logon to PES. It is not related to submitting claims (although you may elect to keep it the same as your other passwords). This password will expire occasionally. You will be prompted to enter a new password. You can also change the password after you logon by clicking Tools/Change Password. **Note1:** PES is a desk top application. EDS does not have or know your password. **Note2:** Any time you do a full install of PES, the password will be set to the default “eds-pes”.