PC-ACE Training Module Using Novitasphere Portal

Novitas Solutions, Inc.

Electronic Data Interchange (EDI)

Updated: 11/19/2025

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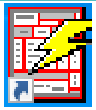
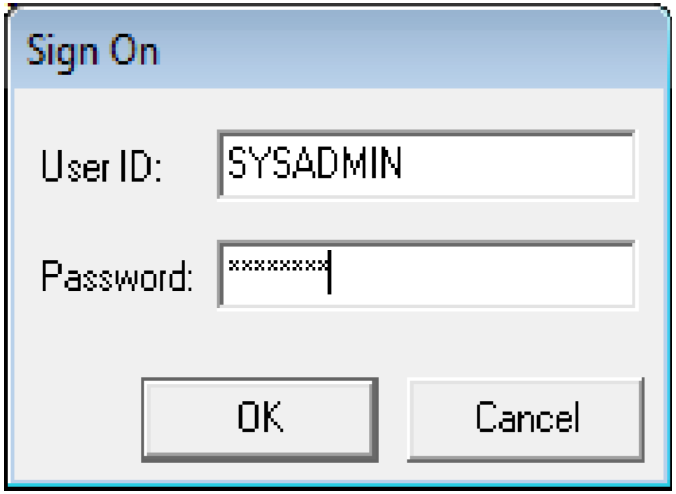
Enroll with EDI

- Prior to using the program, users must enroll for PC-ACE using the EDI enrollment form (8292P).
- Once enrollment is complete the EDI welcome letter will be sent from Novitas that will include your submitter ID and instructions for downloading the software.
- This letter includes the installation password. The password does not change and is needed for each quarterly upgrade or new installation; therefore, please keep it in a safe place where it is readily available.
- Next, visit the Novitas website and download the program.
- Then complete the following steps to set up the program.

Sign on Procedures



- Open the PC-ACE Software.
- Ensure current version is installed.
  - Select “Help” then “About PC-ACE”.
  - Refer to the PC-ACE Upgrade page on our website (JH)(JL) for the most current version files. An installation password will be required for downloading the file.
- Select the Reference File Maintenance icon from the Main Toolbar.
- Enter SYSADMIN for both User ID and Password.

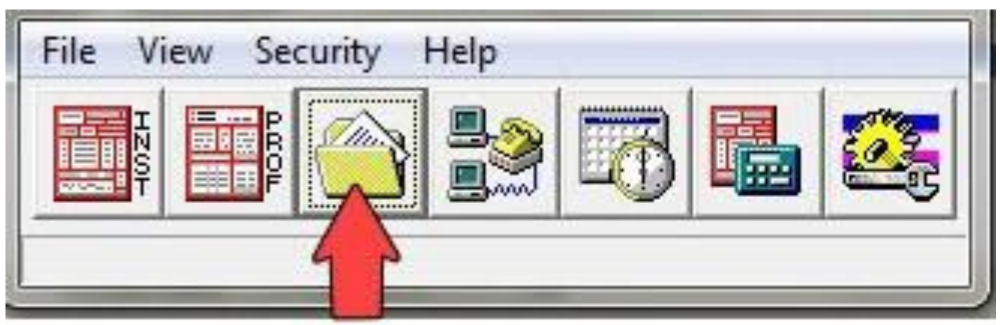


Program Tips

- To access the lookup list for a field, place the cursor in the field and press F2 (or right-click the mouse). When an item from the list is selected, its value is automatically entered in the field.
- To identify which fields contain a lookup list, hold the Alt key and press F2.
- To see what fields are required, click save.
- To disable the flashing notifications, press the Esc key.
- To access the program's help feature, click "Help" and then "Help Topic" from the main toolbar in PC-ACE.

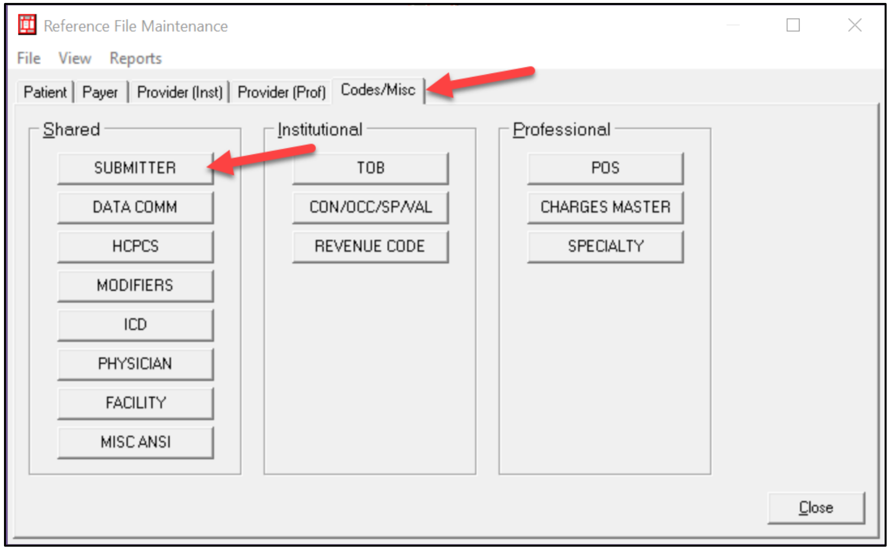
Step One: Setting up the Program

- There are several pieces of information that must be entered into the program to submit a claim file.
- The provider data, patient data, payer data and submitter data should all be entered in the Reference File Maintenance folder.
- Proceed to the Reference File Maintenance folder by clicking on the third icon.

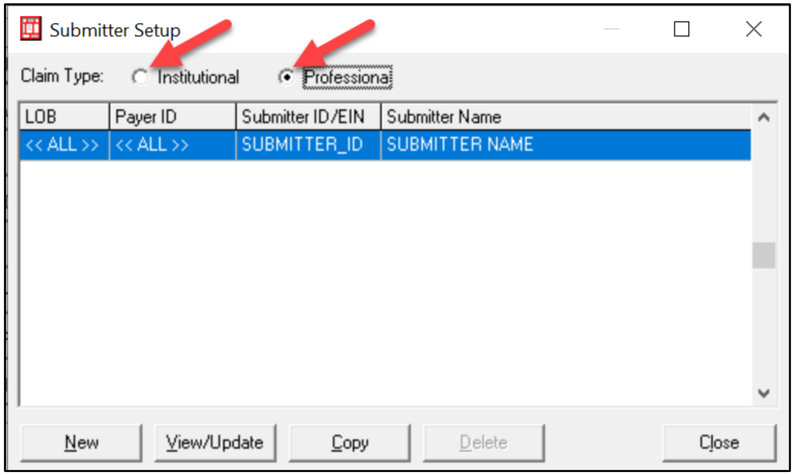


Setting Up the Submitter

- Click the Codes/Misc tab.



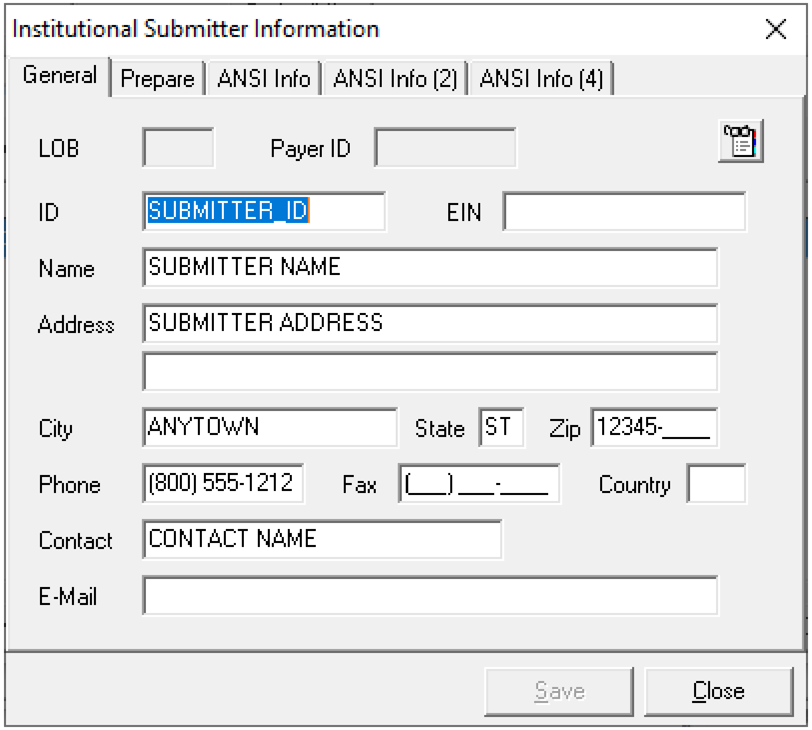
- Click the Submitter button.
- Click the appropriate Claim Type radial button: Institutional for Part A or Professional for Part B.



- Click on View/Update.

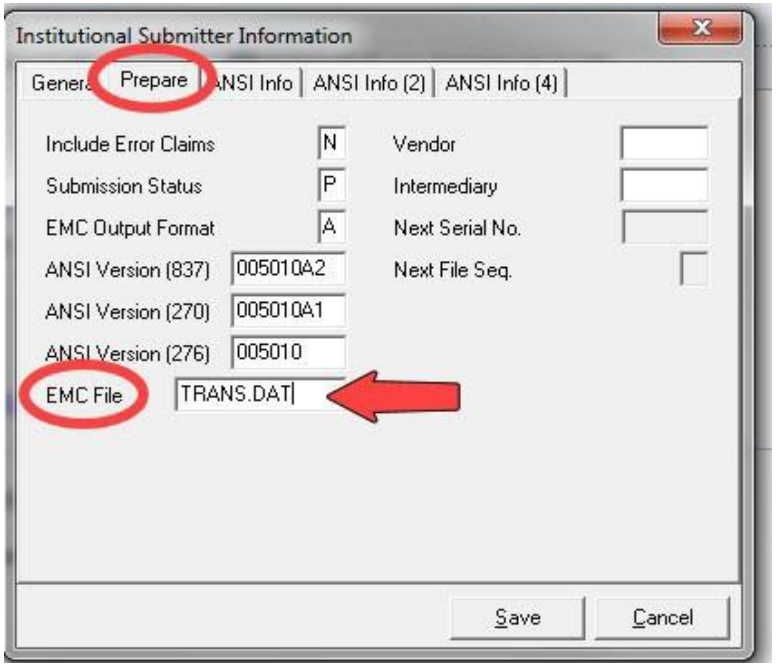
Setting up the Submitter, General tab

- **Required**: ID (submitter ID), Name, Address, City, State, Zip (all 9 digits), Phone, Contact, E-mail
- Enter required information and click Save.
- Leave the EIN blank.
- The submitter ID can be found in your initial EDI Authorization letter and in Novitasphere under the My Account Profile information.



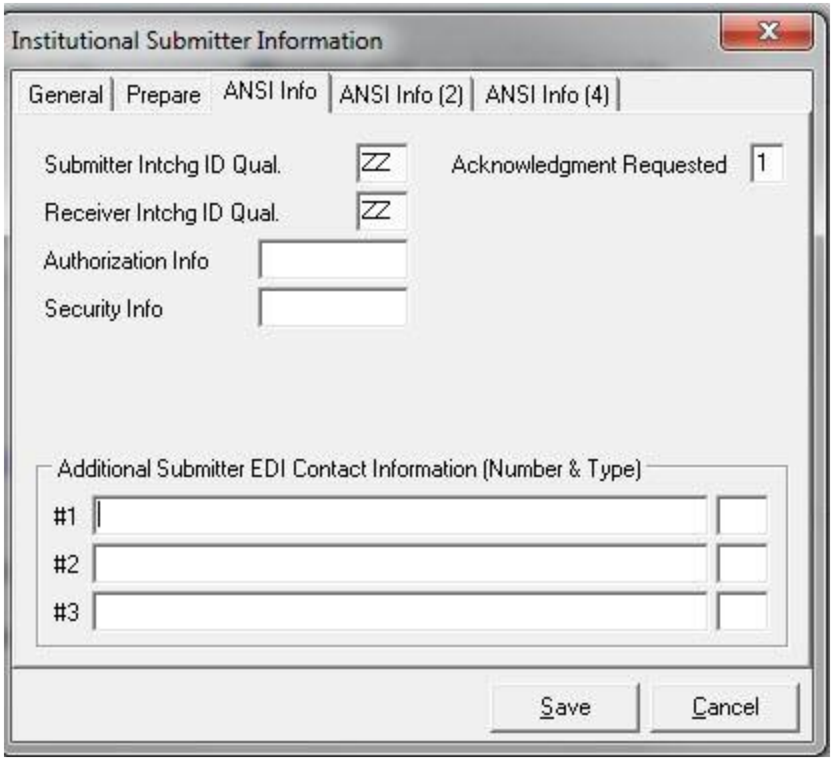
Setting up the Submitter Tab, Prepare Tab

- Complete the next steps:
  - Click on the Prepare tab and enter in the EMC File name. Naming convention shown below.
    - Institutional Claims - TRANS.DAT
    - Professional Claims - TRANSB.DAT



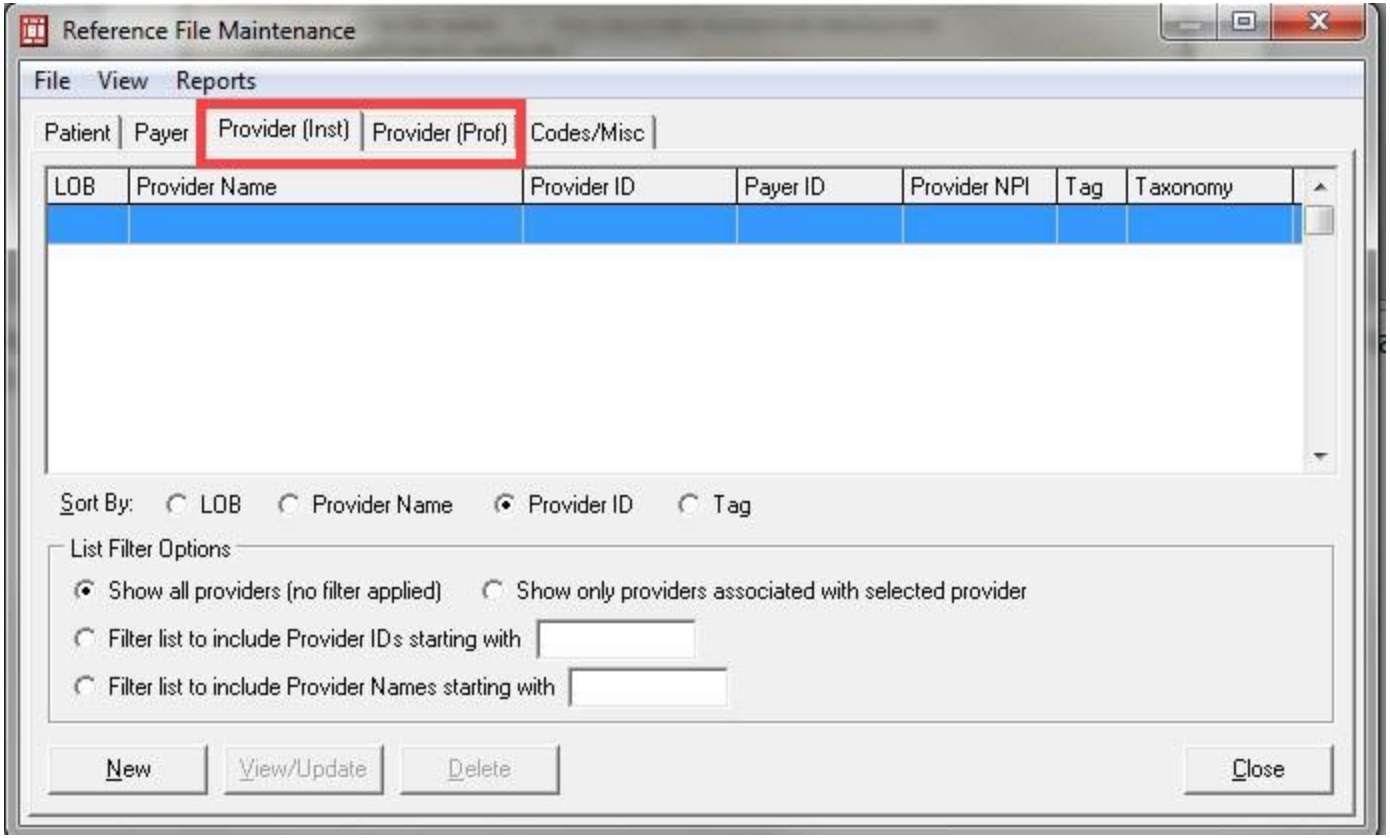
Setting up the Submitter Tab, ANSI Info Tab

- Complete the following steps
  - Click on the ANSI Info tab
    - Enter a ZZ in both the Submitter Intchg ID Qual. and the Receiver Intchg ID Qual. Fields
    - Enter a "1" in the Acknowledgement Requested field
    - Click Save and then close



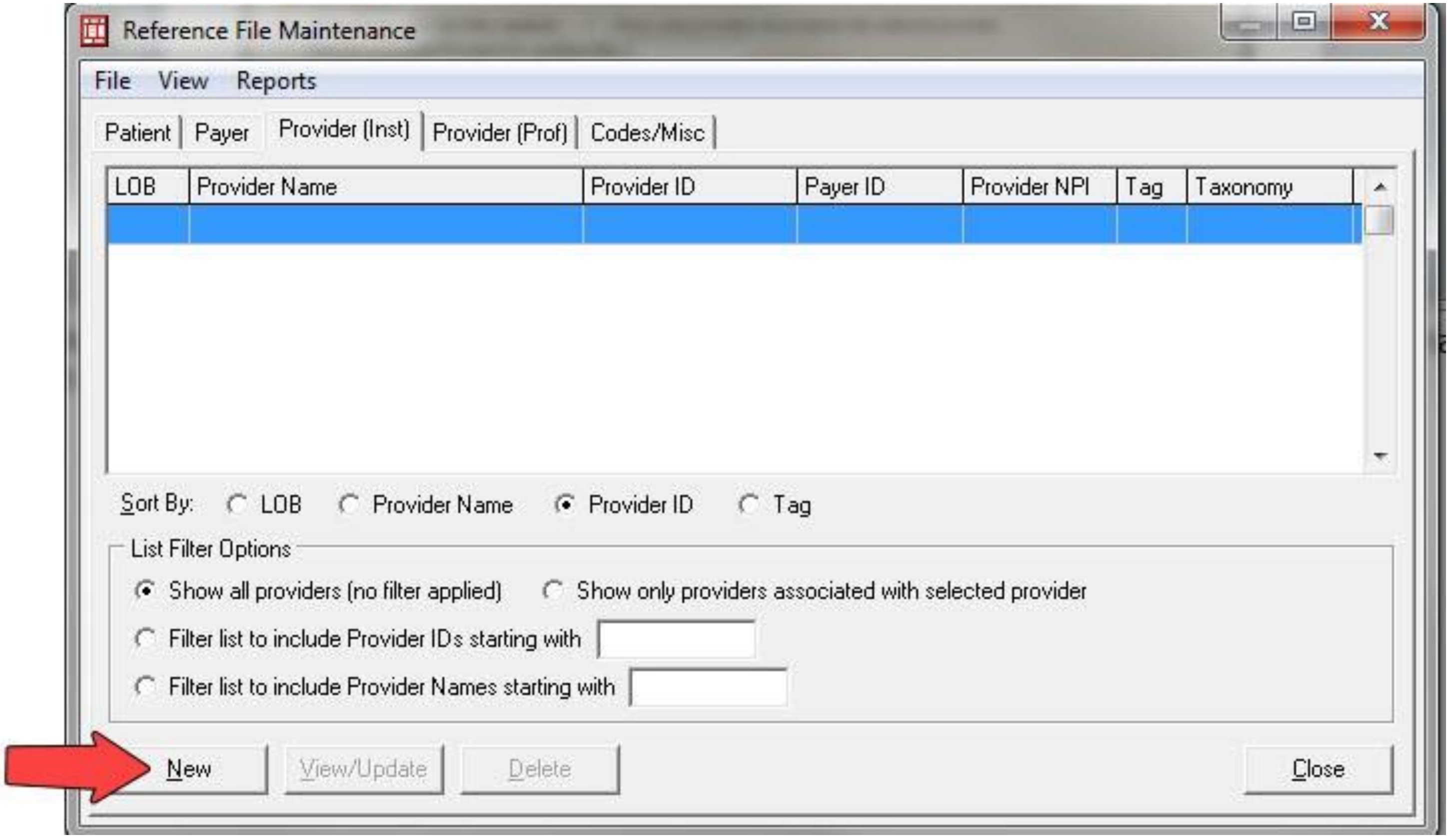
Setting up Provider Information

- Click the provider tab for either institutional (Part A) or professional (Part B).



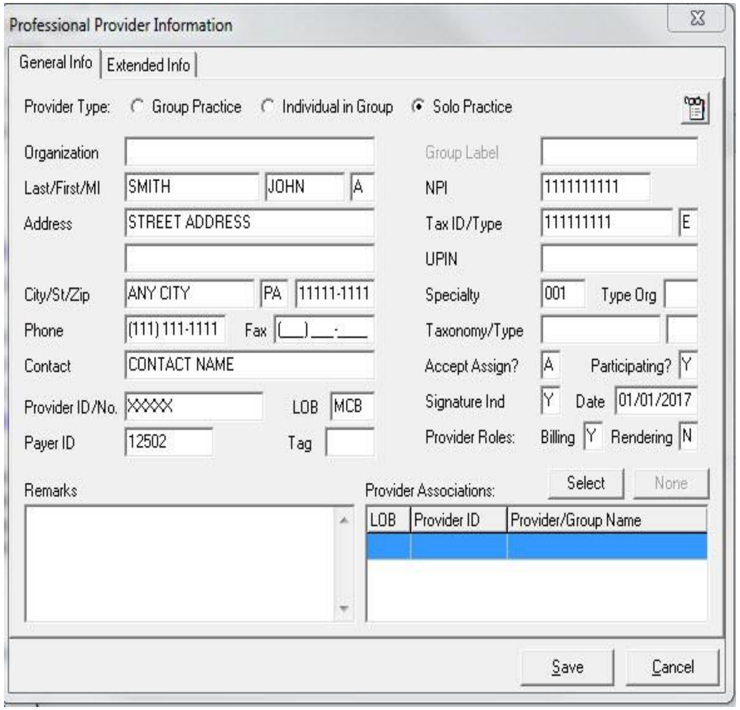
Setting Up Provider Information, continued

- Then click the New button.



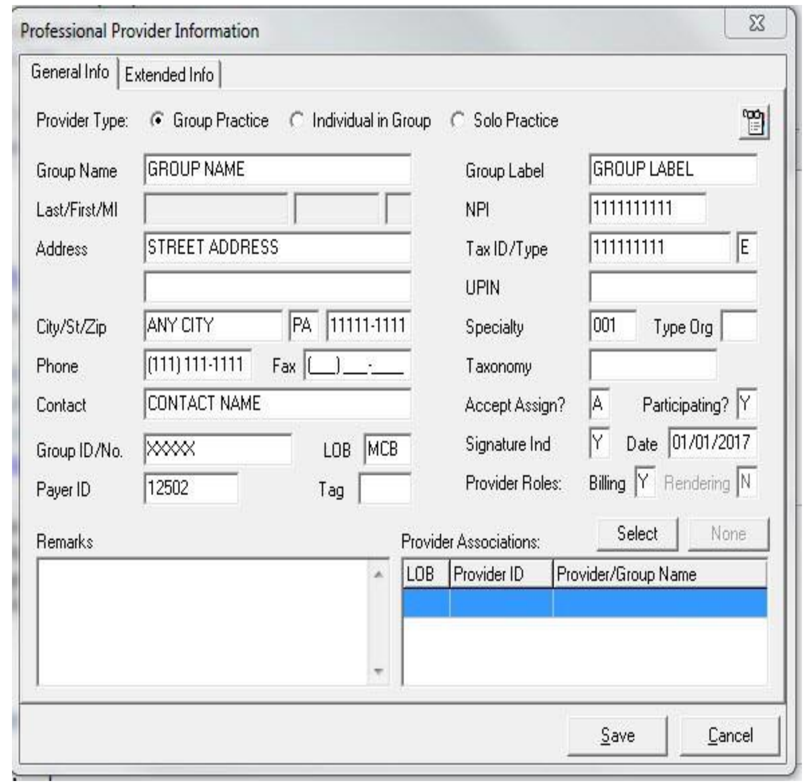
Setting up Provider Information, Solo Practice

- **Solo Practice**: Reference File Maintenance> Provider Prof>Solo Practice.
  - Organizations without rendering providers, such as ambulance or ambulatory surgery centers, would use this option as well.
- Complete all necessary fields and then Save. Refer to Section 2 of the PC-ACE User guide for more info.
- Required: Provider Type – Solo Practice, Last/First, Address, City, State, Zip (all 9 digits), Phone, Contact, Provider ID/NO, LOB, Payer ID, NPI, Tax ID/Type, Specialty, Accept Assign, Participating, Signature Ind, Date
- Enter required info and click Save.



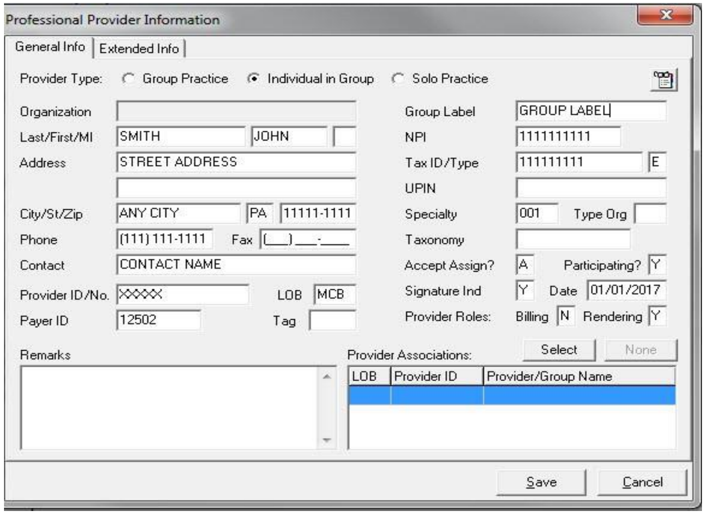
Setting up Provider Information, Group

- Reference File Maintenance>Provider Prof>Group Practice.
- Complete all required fields.
- **Required:** Provider Type--Group Practice, Group Name, Address, City, State, Zip (all 9 digits), Phone, Contact, Group ID/NO, LOB, Payer ID, Group Label, NPI, Tax ID/Type, Specialty, Accept Assign, Participating, Signature Ind, Date
- Entered required info and click Save.



Setting up Provider Information, Individual

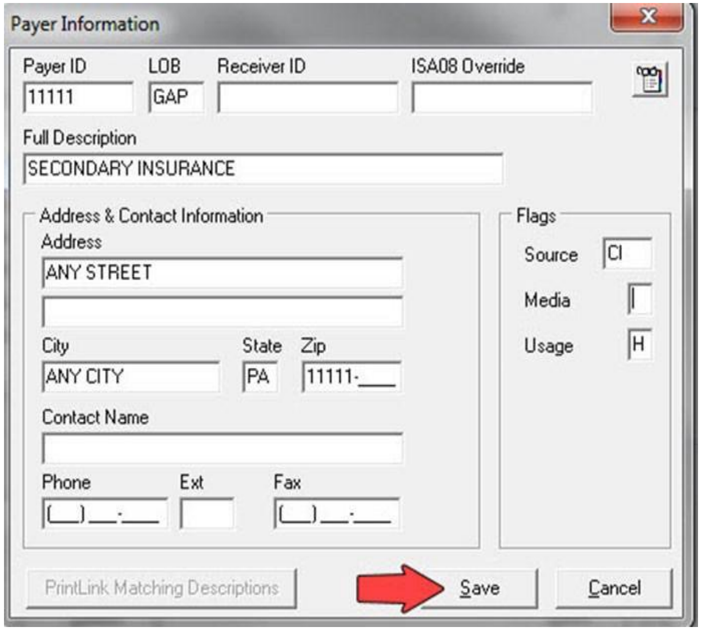
- This is an example of a Rendering Physician for a group practice.
- **Individual in Group:** Reference File Maintenance>Provider Prof> Individual in Group
- Tip: complete the group information first so you can copy it and edit what needs changed. To copy select New and then Inherit name/address information from selected provider.
- **Required:** Provider Type-Individual in Group Last/First, Address, City, State, Zip (all 9 digits), Phone, Contact, Provider ID/No., LOB, Payer ID, Group label, NPI, Tax ID/Type, Specialty, Accept Assign, Participating, Signature Ind, Date



- Enter required info and click Save.

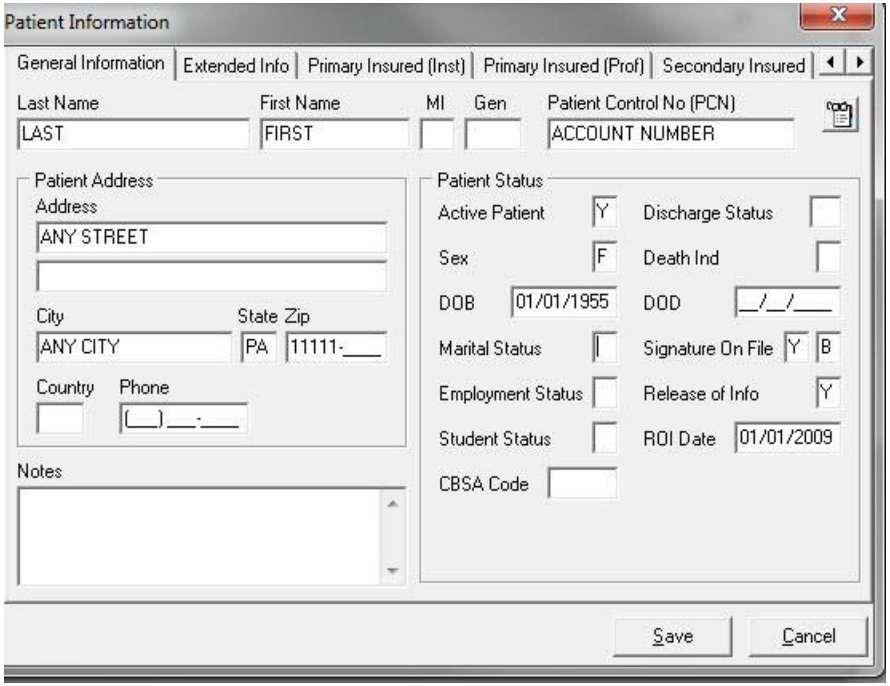
Setting up the Payers

- **Payers:** Reference File Maintenance>Payer
- PC-ACE is already pre-loaded with the Novitas Solutions' Payer numbers. If your patient has another payer as either their primary or secondary insurer, you must set them up in the Payer tab.
- To add a payer, click the New button.
- **Required**: Payer ID, LOB, Full Description, Address, City, State, Zip (all 9 digits), Source, Media
- Enter required info and click Save.
- A separate payer screen must be completed for each insurance that is primary to Medicare, and Medigap as a secondary insurer. Secondary insurances that accept crossover claims do not need to be set up as a payer.



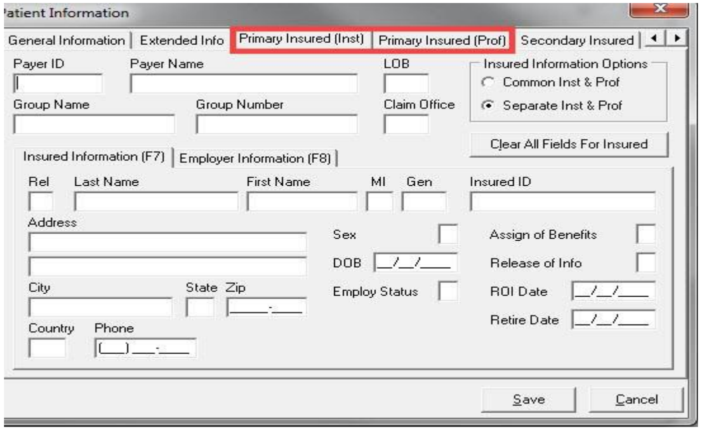
Setting Up the Patients

- **Patient:** Reference File Maintenance>General Information
- **Required**: Last Name, First Name, PCN(Patient Account number) Address, City, State, Zip, Sex, DOB, Signature on File, Release of Info (ROI), ROI Date



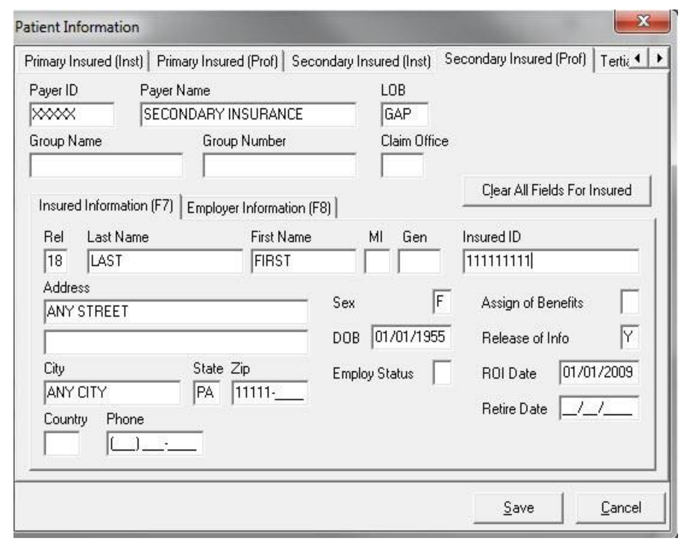
Setting up the Patients, Primary Insured

- **Primary Insured Tab:** Reference File Maintenance>Patient, Primary Insured tab. There are different tabs for institutional and professional. Please choose the correct one
- Select the appropriate radio button for the Insured Information Options.
- **Required**: Payer ID (right click to select from Payer Database), Rel, Last Name, First Name, Insured ID, Address, City, State, DOB, Assign of Benefits, Release of Info, ROI Date
- If Medicare is the primary, choose the appropriate Payer ID for the Medicare contract. The Insured ID should be the Medicare ID. Rel field should be “18” for self. The Group Name and number should be left blank.
- If Medicare is secondary, the Payer ID should be for the primary insurance. The Insured ID should be the policy number with the primary. Choose the appropriate indicator for the Rel field.



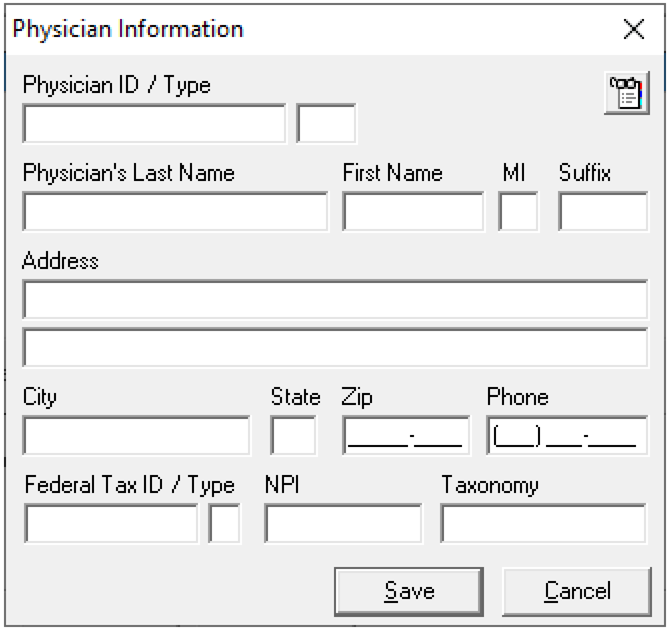
Setting up the Patients, Secondary Insured

- Secondary **Insurance Tab:** Reference File Maintenance>Patient> Primary Insured tab. There are different tabs for institutional and professional. Please choose the correct one.
- This should be completed for Medigap insurance information. **Secondary insurances that accept crossover claims should not be listed.** If Medicare is secondary, it should be listed here.
- **Required:** Payer ID (right click to select from Payer Database), Rel, Last Name, First Name, Insured ID, Address, City, State, DOB, Assign of Benefits, Release of Info, ROI Date
- Click the Save button.
- When adding Medicare as the secondary, the Group Name and Group Number should be left blank.



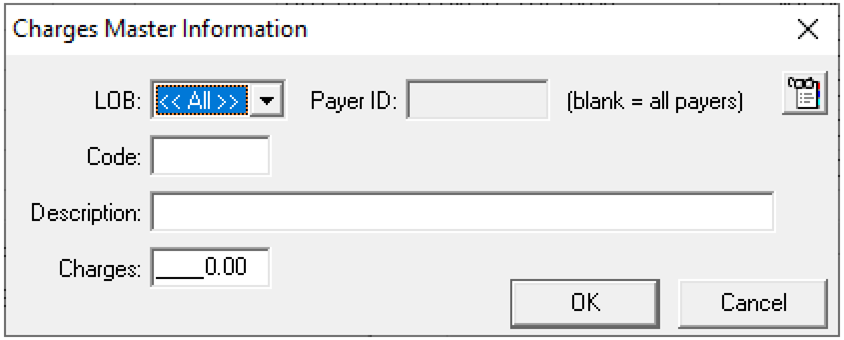
Physician Information

- **Physician Information:** Reference File Maintenance>Code/Misc> Physician
- This is for the referring, ordering, attending, or supervising physician information. Enter the billing and / or rendering provider in the Provider Information screen.
- **Required**: Physicians Last Name, First Name, NPI
- Enter the required information and then click Save.



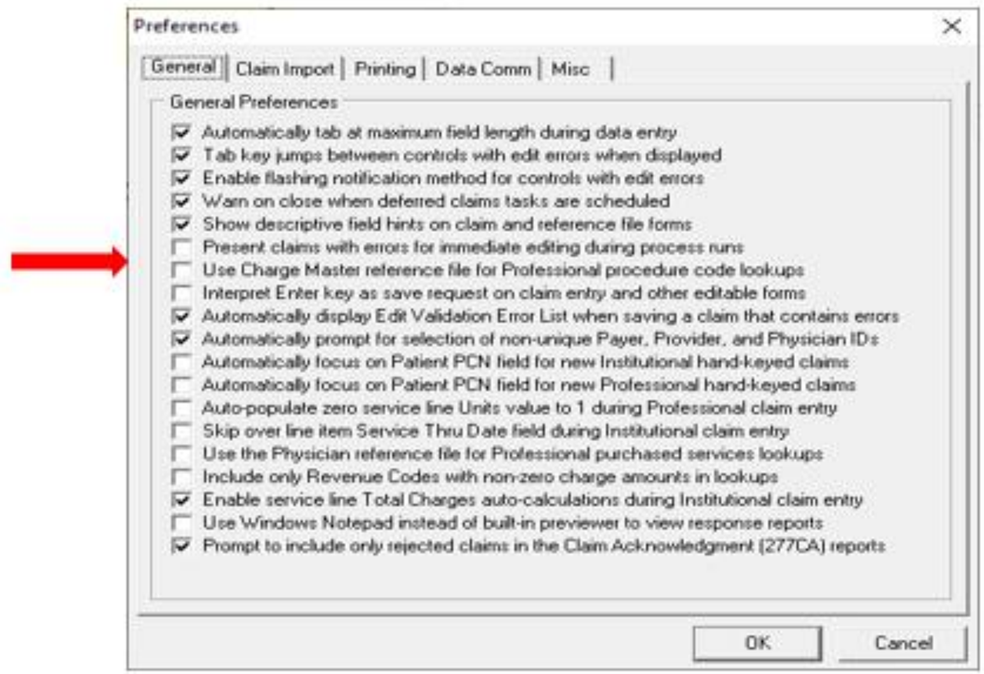
Charges Master Setup

- **Charges Master**: Reference File Maintenance>Codes/Misc> Charges Master
- Select New.
- **Required**: Code (HCPCS), Charges
- Enter required info and click OK.
- This allows for the HCPCS file to be narrowed down to only the codes you use and their charges.



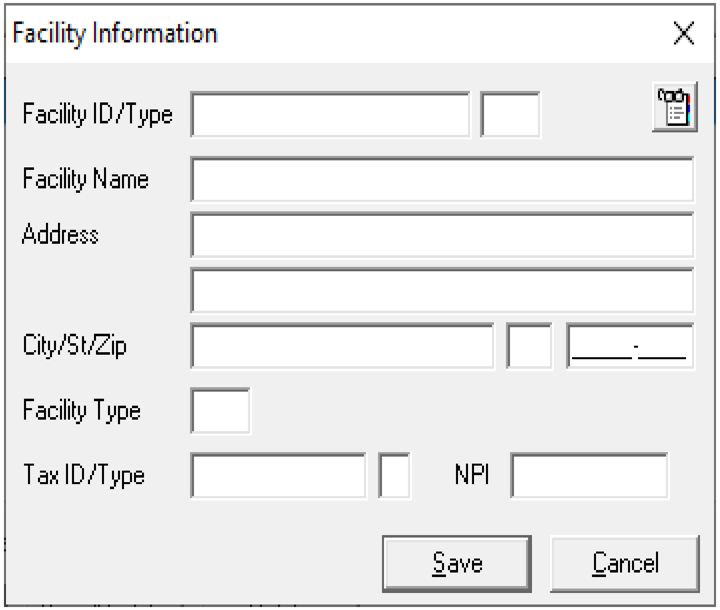
Charges Master Setup, continued

- File>Preferences>General Tab
- Select Use Charge Master reference file for Professional procedure code look-ups.
- Select OK.



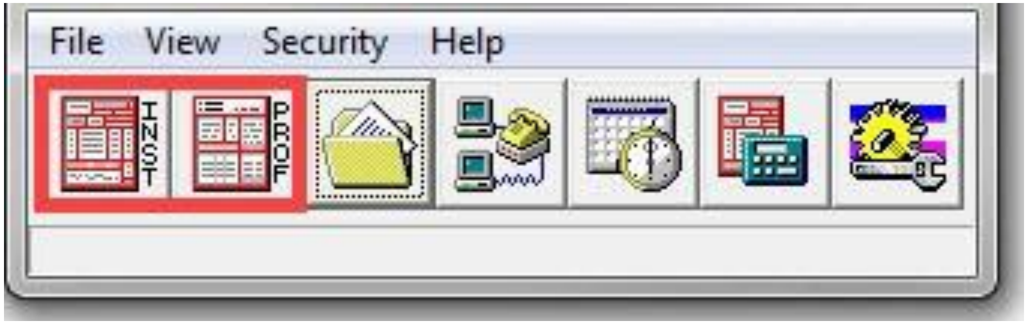
Facility Information

- **Facility**: Reference File Maintenance>Codes/Misc>Facility
- **Required:** Facility Name, Address, City, State, Zip (all 9 digits), Facility Type
- Enter required info and click Save.
- Tip: Facility information is required when billing a place of service other than office (11).



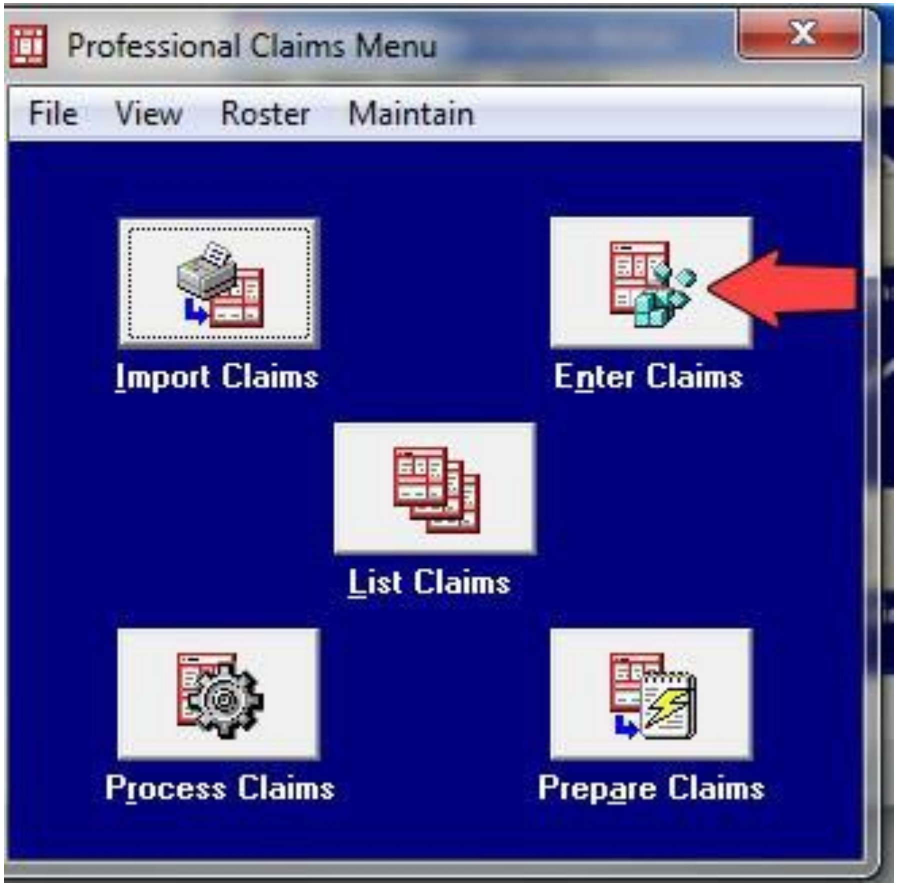
Step Two: Entering a Claim

- **Claims Processing**: Institutional or Professional Claims Processing icon >Enter Claims> Patient Info & General.
- Choose Professional Claims to submit dental (837D).



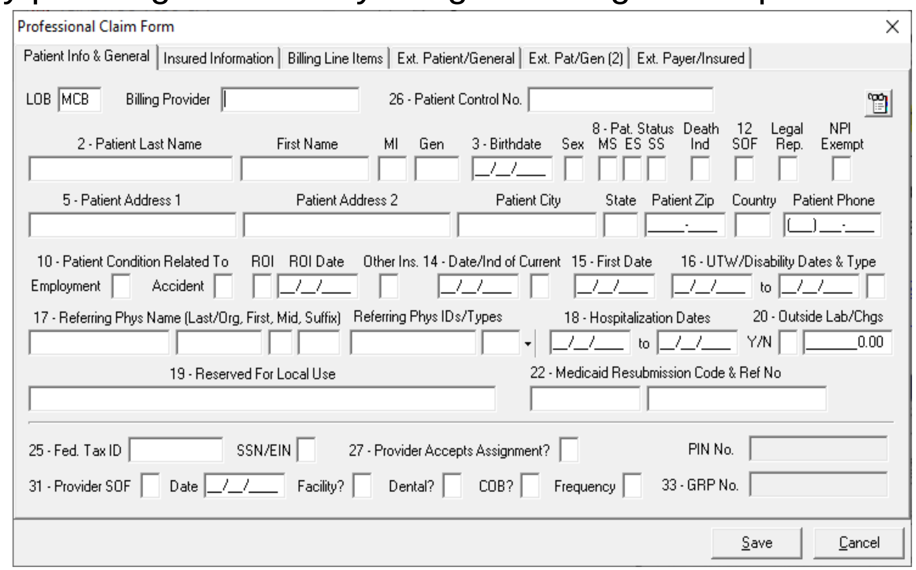
Entering a Claim, continued

- Then click the Enter Claims icon.



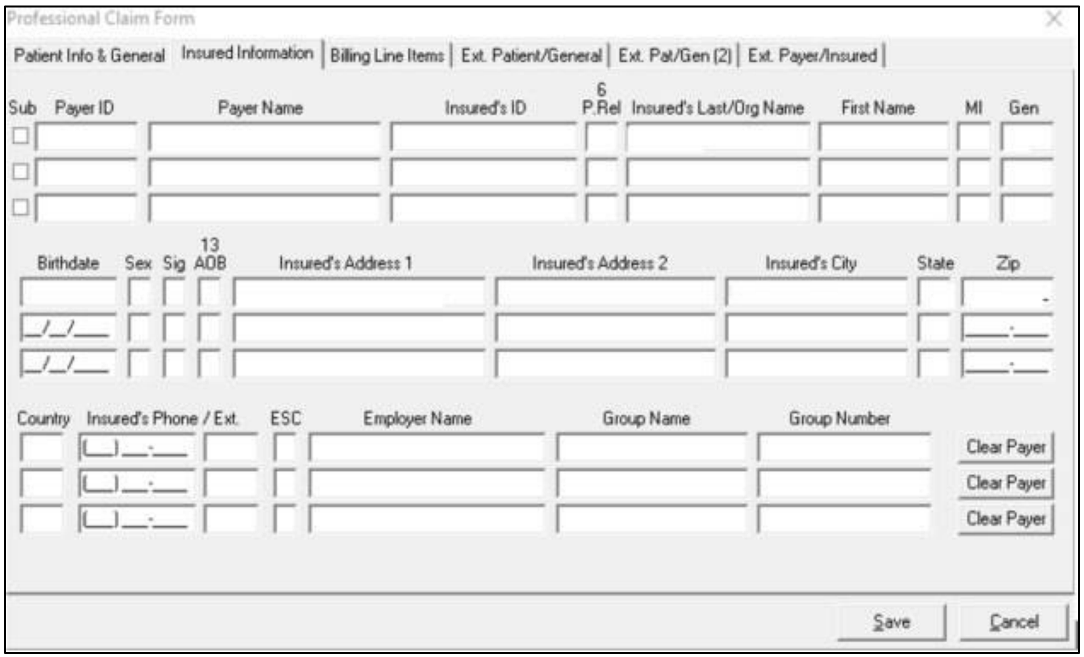
Entering a Claim, continued 2

- **Required:** LOB, Billing Provider, Patient Control No, Employment, Accident, Outside Lab, Dental (for 837D claims only)
- The Edit Validation Errors list will be shown if any required fields have not been completed.
- Information on entering claims for various specialties is available in Chapters 2 and 3 of the PC- ACE User Guide.
    - JH: http://www.novitas-solutions.com/webcenter/portal/MedicareJH/pagebyid?contentId=00004603
    - JL: http://www.novitas-solutions.com/webcenter/portal/MedicareJL/pagebyid?contentId=00004603
- Many of the fields have a pop-up selection feature that lists valid entries for that specific field.
- Access the list by pressing the “F2” key or right clicking in the specific field.



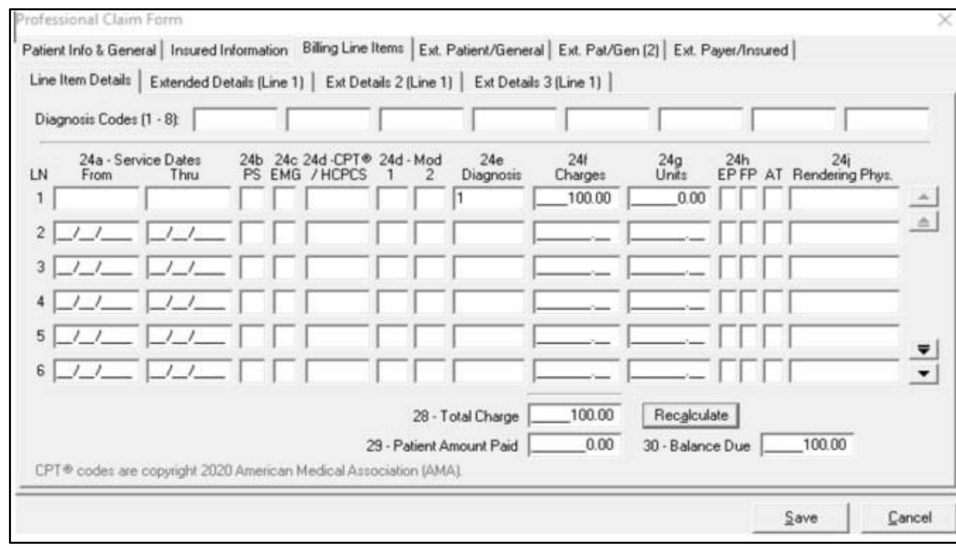
Professional Claim Form, Insured Information

- **Professional Claim Form:** Professional Claims Menu>Enter Claims> Insured Information
- Information will pull from the Patient database when the patient is selected on the Patient Info & General Tab



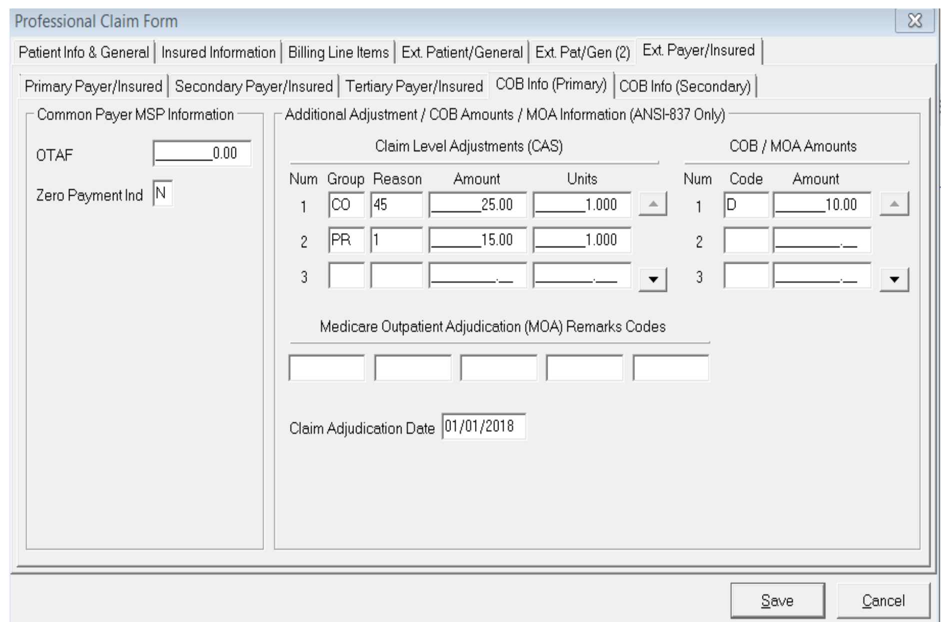
Professional Claim Form, Billing Line Items

- **Billing Line-Items**: Professional Claims Menu>Enter Claims>Billing Line Items>Line-Item Details
- **Required:** Diagnosis Codes (at least one), Service From/Thru Dates (DOS), Charges, PS (place of service), CPT/HCPCS, Diagnosis Pointer, Charges, Units, Rendering Phys. (unless billing as a Solo Provider), Total Charge, Dental tab (837D claims only)
- Click Recalculate.
- Once all claim information is entered, click Save.



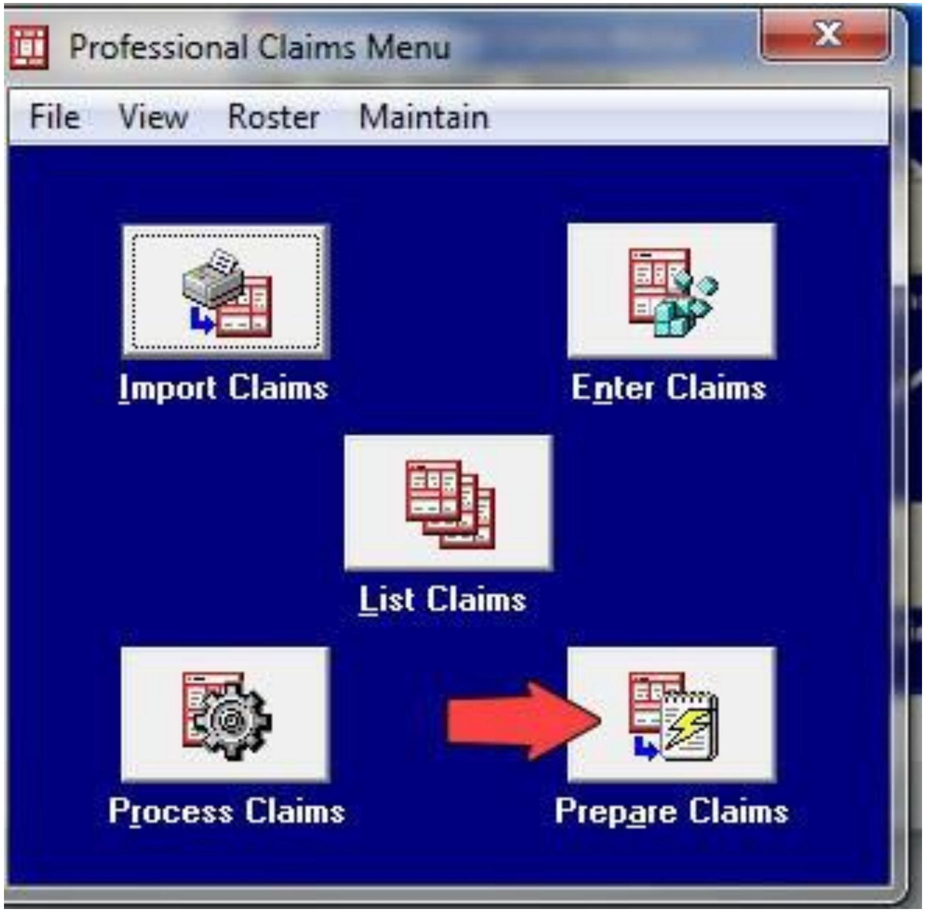
Entering a Medicare Secondary Claim

- **COB Info:** Professional Claim form>Ext. Payer/Insured tab>COB Info tab
- Complete the required fields as normal for a Medicare claim.
- Type a “Y” in the COB? field on the Diagnosis/Procedure Code (Institutional) or Patient Info & General (Professional) screens to indicate the patient has Medicare as a secondary payer.
- Click on Ext. Payer/Insured tab, and then COB Info (Primary) tab.
- Enter the information from the primary Explanation of Benefits.
- Do not send the primary EOB to Novitas.



Step Three: Preparing File for Transmission

- Once the claims are saved, click the Prepare Claims icon.

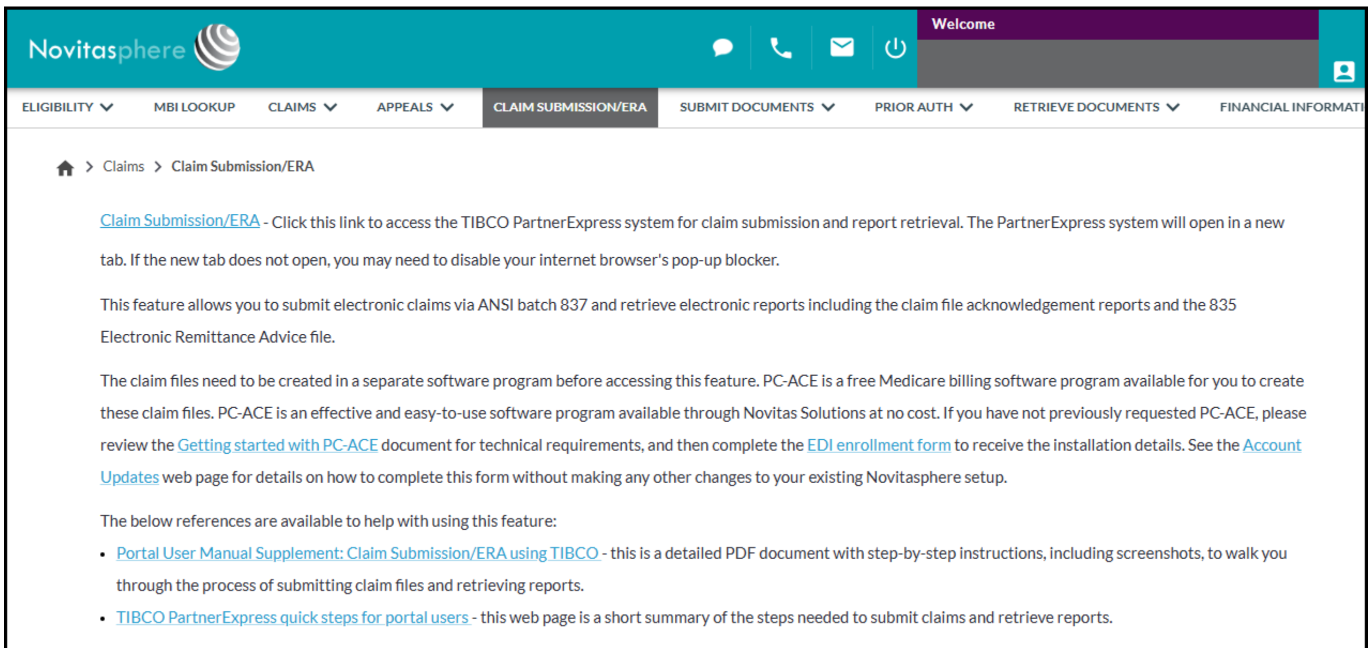


Preparing File for Transmission, continued

- Then click on the Prepare Claims button. This will create a file named “trans.dat” for Part A or “transb.dat” for Part B. The file will be in your “C” or other local drive under the WINPCACE folder.

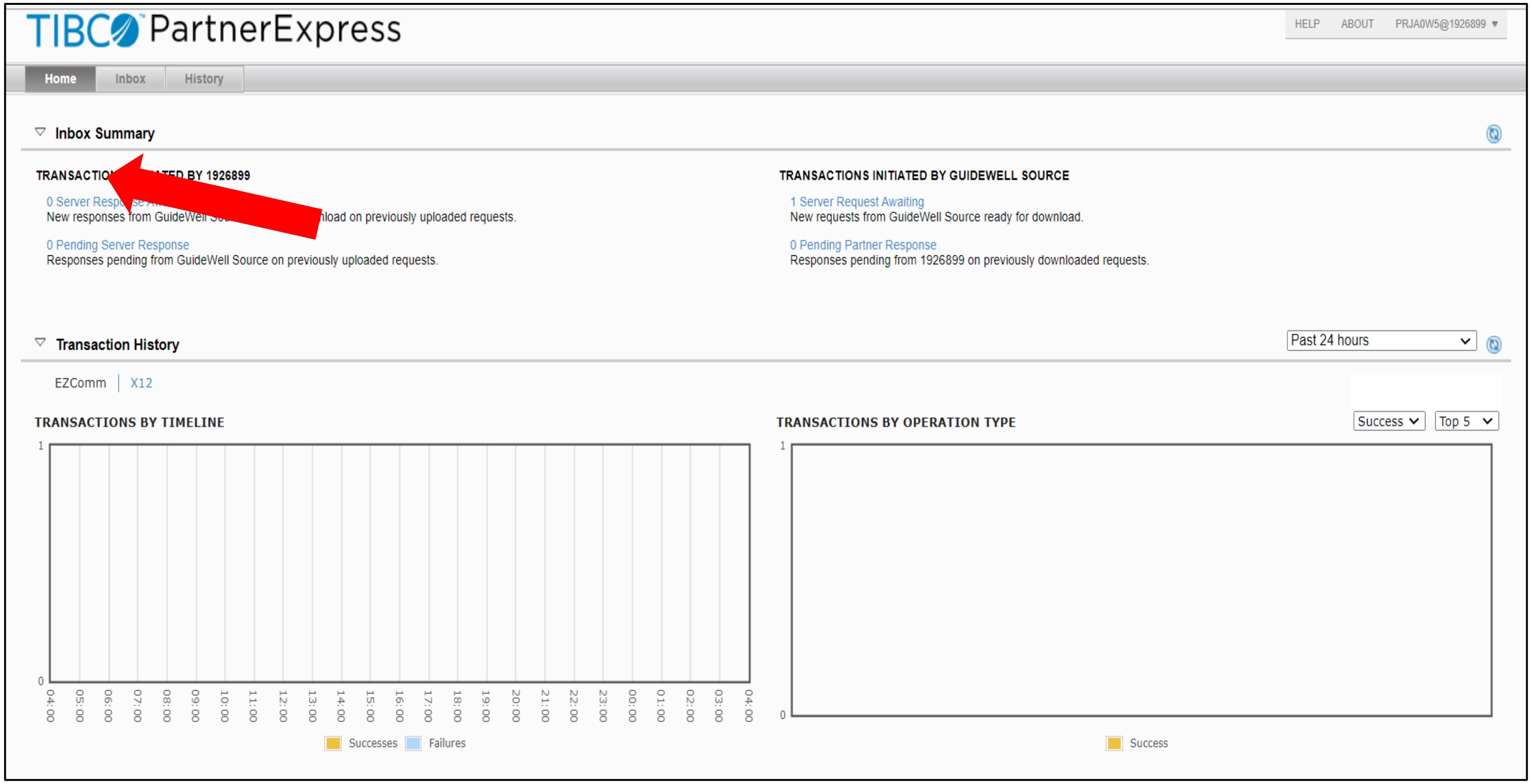
Transmitting the File

- Access the Novitasphere portal and click on Claim Submission/ERA and the Claim Submission/ERA link. A separate browser window will open. If the new window does not open automatically, you may need to turn off your internet browser's pop-up blocker or add the website address to list of the allowed sites.



Transmitting the File, continued

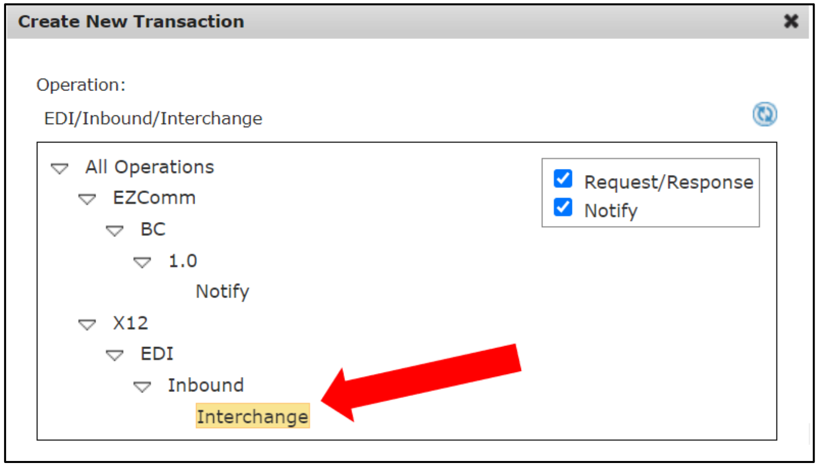
- Click on **Inbox**



Transmitting the File, continued 2

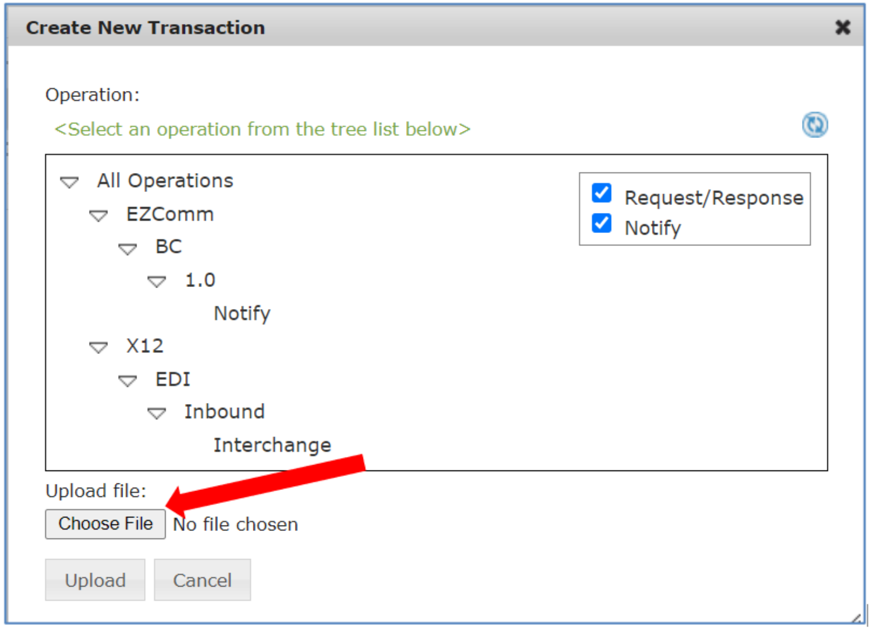
- Click on the **New** button.

- Select **Interchange**.



Transmitting the File, continued 3

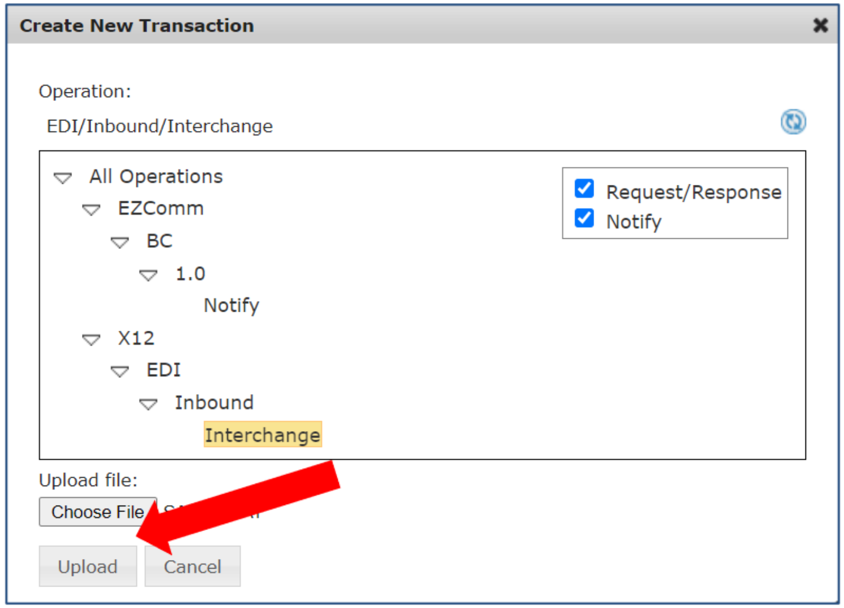
- Click **Choose File** and then navigate to the WINPCACE folder and look for the file named TRANS.DAT for Part A and TRANSB.DAT for Part B files.



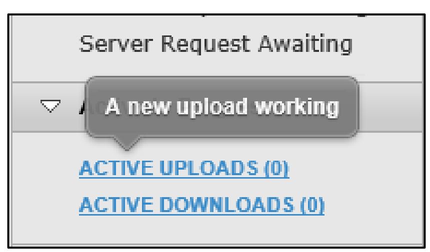
- Select the file(s) and click **Open**. The selected file will display in “Upload file” textbox.

Transmitting the File, continued 4

- Click **Upload** to submit the file.



- “A new upload working” pop-up message will be displayed briefly.



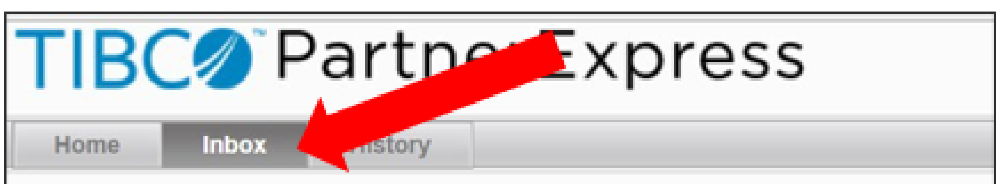
Pulling Reports

999 Acknowledgement Report - This report will display in the Inbox a few minutes after submitting an 837 claim file. This report will tell you if the file is initially accepted or rejected. If rejected, the report will give the reason for rejection.

277CA Claims Acknowledgement Report - This report will display in the Inbox a few minutes after a 999 Acknowledgement Report without any errors. This report will tell you if each claim was accepted for processing or was rejected. If rejected, the report will give the reason for rejection.

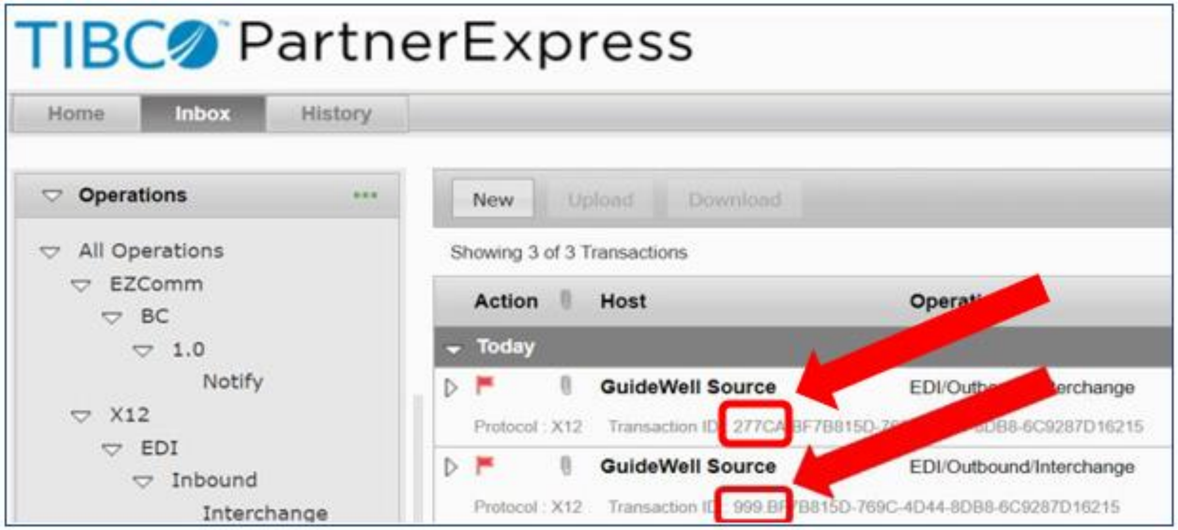
To download reports, complete the following steps:

- Close PC-ACE
- Access the Novitasphere portal
- Click on Claim Submission/ERA
- Click the link for the New Claim Submission/ERA gateway
- Click on the Inbox



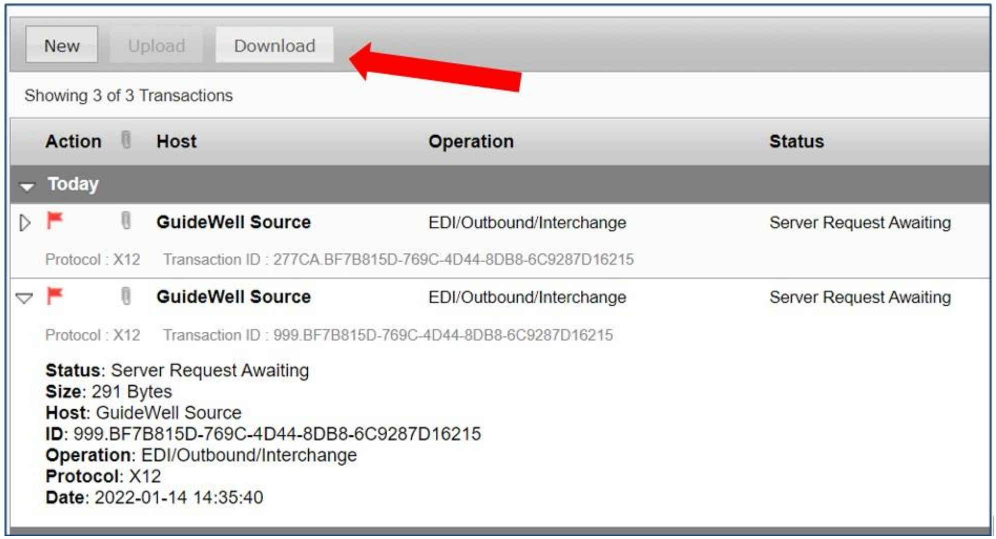
Pulling Reports, continued

- Look for the Transaction ID starting with 999 or 277CA.



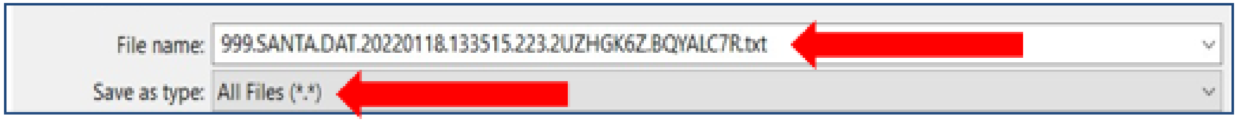
Pulling Reports, continued 2

- Select the report from the Inbox list and click **Download**.



Pulling Reports, continued 3

- Change the File name ending from .dat to **.txt.**
- Change the 'Save as type' field to '**All Files (*.*)**'.



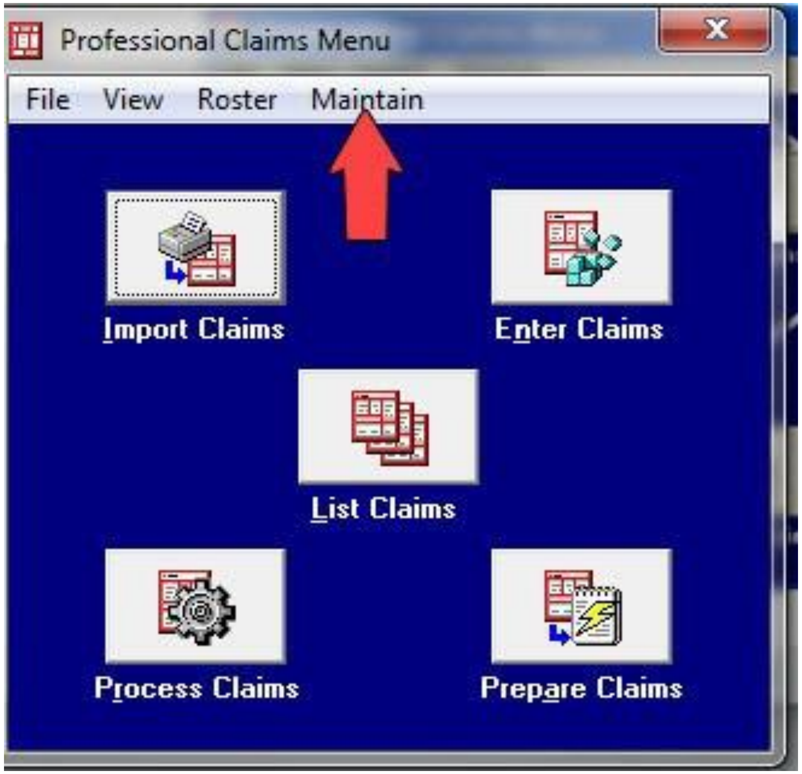
- Navigate to the proper location on your computer and click **Save.**

  The default location is C:\WINPCACE\Mailbox.

- Complete these steps for additional reports.
  - The EDI Reports are only available for retrieval for 60 calendar days. It's important to establish a daily routine for retrieving the reports.

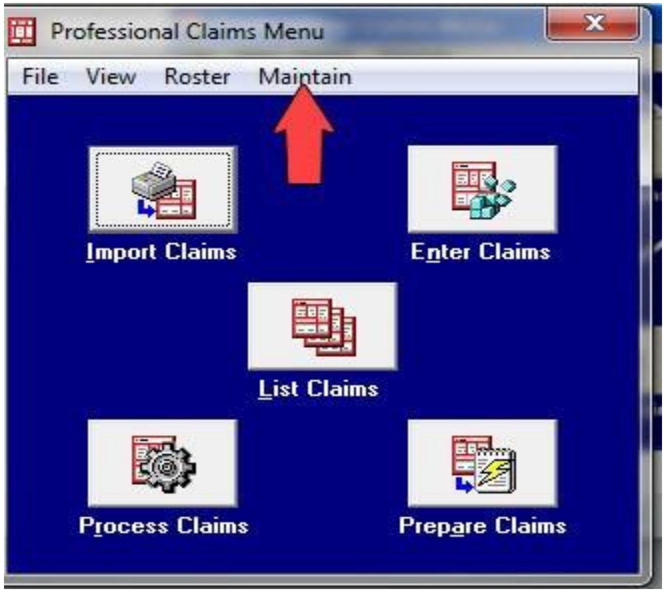
Viewing the 999 Acknowledgement

- After downloading the report using Novitasphere, click the Institutional Claims Processing icon for Part A. For Part B, click the Professional Claims Processing icon and complete the following steps:
  - Click Maintain
  - Click Acknowledgement File Log
  - Click the appropriate report
  - Click View Report
- Claims rejecting on this report will need to be corrected and resent.
- More information on reading the report is available in the [Understanding the 999 Report]() training module.



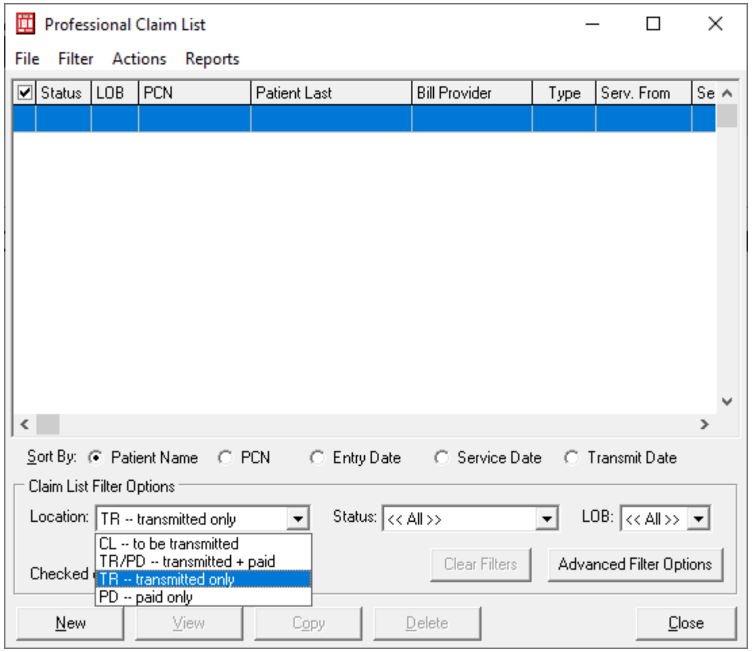
Viewing the 277CA Acknowledgement

- After downloading the report using Novitasphere, click the Institutional Claims Processing icon for Part A. For Part B, click the Professional Claims Processing icon and complete the following steps:
  - Click Maintain
  - Click Claim Status Response & Acknowledgement Log
  - Click the appropriate report
  - Click View Report
- Claims rejecting on this report will need to be corrected and resent.
- More information on reading the report is available in the Understanding the 277CA Report training module.



Claim Re-activation

- **Professional Claim List**: Professional Claims Menu>List Claims>TR-Transmitted Only
- Check selected claims for reactivation.
- Click Action.
- Click Reactivate all Checked Claims
- If corrections are needed change the location to CL-to be transmitted then update and save the claim.

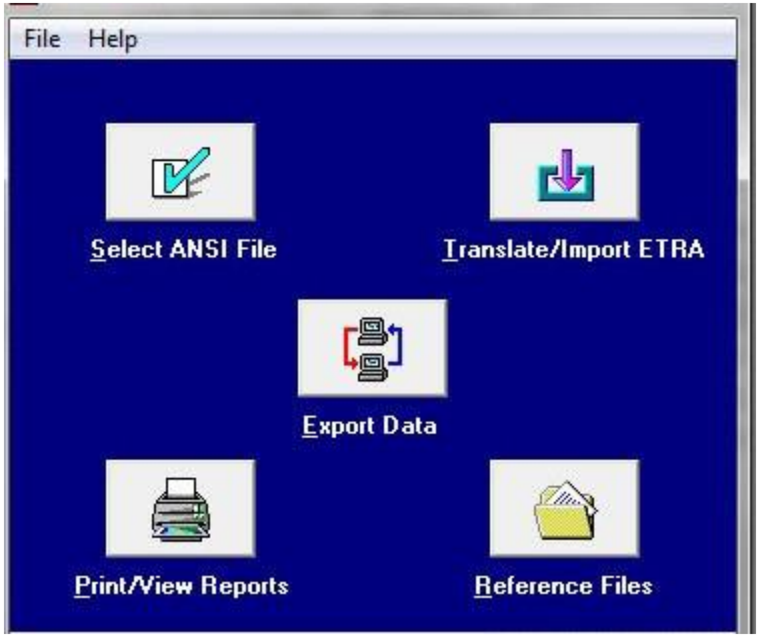


Viewing the 835/Electronic Remittance

- If you are setup to receive ERA to your Novitasphere submitter ID, the 835 file will also display in the TIBCO Inbox (found in Novitasphere's Claim Submission/ERA feature).
- After downloading the 835 file using Novitasphere, click the ANSI – 835 Functions icon
- Click Institutional or Professional

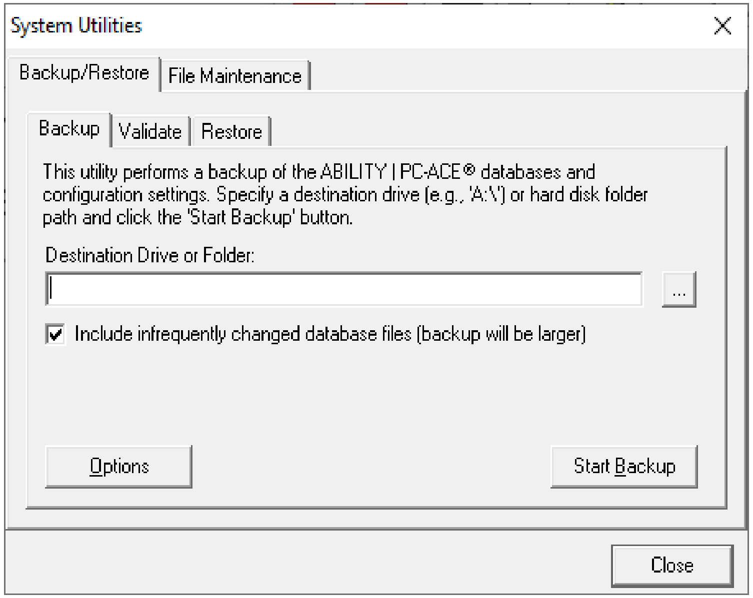
Viewing the 835, continued

- Click Select ANSI File
- Click on the ERA file you would like to view
- Click Select
- Click Translate/Import ETRA
- Click Print/View Reports
- Choose the type of report you would like to view and click OK
- Enter specific pages to view or click OK



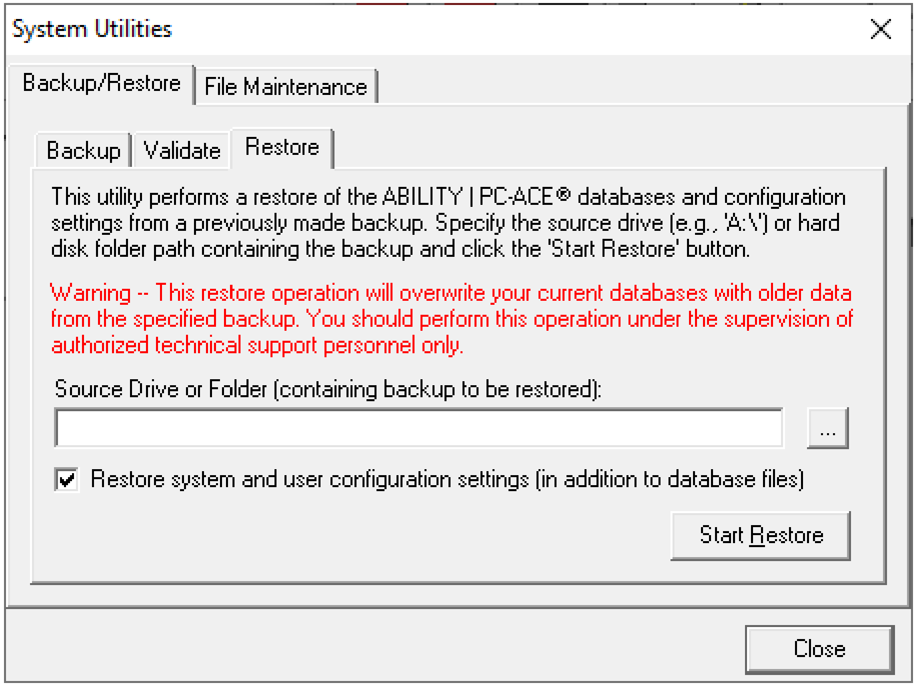
Data Backup

- **Backup**: System Utilities>Backup
- Choose a destination folder by clicking the three-dot button
- Click Start Backup
- The software can back up databases such as patient records and provider records each time you close the program.
- It is encouraged that you back up the software every time you upgrade and when adding large amounts of data to the program.



Data Restore

- **Restore**: System Utilities>Restore
- Locate your stored backup by clicking the three-dots button
- Click Start Restore



Quarterly Upgrades

- Upgrades are issued to the PC-ACE program every quarter in January, April, July, and October.
- The download password for the upgrades was provided in the Initial EDI Welcome letter. The password does not change and is needed for each quarterly upgrade or new installation; therefore, please keep it in a safe place where it is readily available.
- Upgrades should be downloaded as soon as possible to avoid claim rejections.

Resources

- Additional information on the PC-ACE program is located on our Web site at:
  - PC-ACE User Guide
    - JH: http://www.novitas-solutions.com/webcenter/portal/MedicareJH/pagebyid?contentId=00004603
      JL: http://www.novitas-solutions.com/webcenter/portal/MedicareJL/pagebyid?contentId=00004603
  - PC-ACE Quick Steps
    - JH: http://www.novitas-solutions.com/webcenter/portal/MedicareJH/pagebyid?contentId=00004605
    - JL: http://www.novitas-solutions.com/webcenter/portal/MedicareJL/pagebyid?contentId=00004605
  - EDI Help Desk
    - JH: http://www.novitas-solutions.com/webcenter/portal/MedicareJH/pagebyid?contentId=00025068
    - JL: http://www.novitas-solutions.com/webcenter/portal/MedicareJL/pagebyid?contentId=00004525