

## Device System Transactions

System transactions are those transactions that pertain to the Point of Service (POS) device itself, rather than to subscribers. System transactions allow you to download and activate new versions of POS device software, reset your password or the date/time, and configure and customize certain parameters of your device, such as the content that prints on receipt headers and footers.

The following transactions comprise the suite of system transactions.

- Help
- Connectivity Test
- Password Reset
- Date/Time
- Download
- Parameter Update
- Device Setup

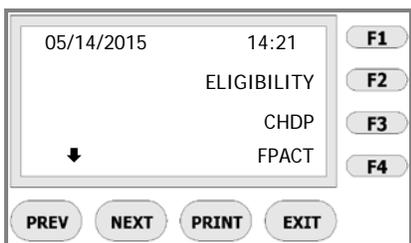
If you have questions regarding the operation of the POS device, call the Telephone Service Center (TSC) at 1-800-541-5555 and select the option for POS/Internet inquiries.

### Beginning a Transaction

Use the following three steps to begin any System transaction on the POS device.

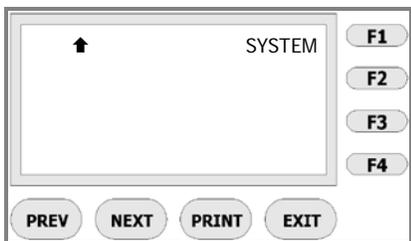


1. The first screen on the POS device is the Welcome screen. You can either swipe a Benefits Identification Card (BIC) through the card reader or press any key to get started.



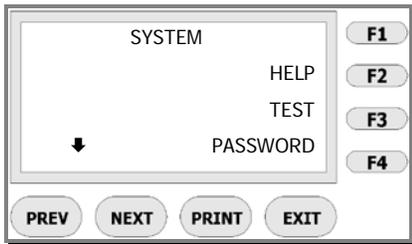
2. After swiping a BIC or pressing any key, the Main Menu screen displays. Press the function <F> key corresponding to SYSTEM.

If the SYSTEM option is not displayed and you see the (↓) character on the screen, press <NEXT> until the SYSTEM option displays, then press the corresponding <F> key. In this example, press <F1>.



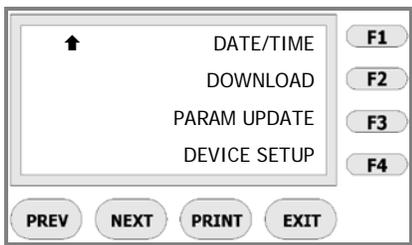
## device system 2

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### 3. System Menu

After selecting SYSTEM in step 2, the System Menu displays. Select a transaction by pressing the corresponding <F> key. Press the <NEXT> or <PREV> keys to scroll through the complete list of transactions.

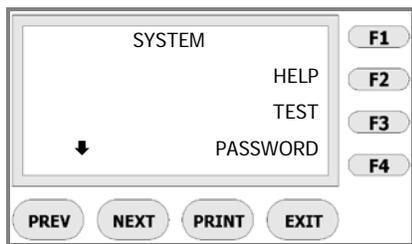


## Help Transaction

The Help transaction provides two types of help:

- **CA-MMIS Help** – Every field of every transaction available on the POS device is assigned a number, referred to as a California Medicaid Management Information System (CA-MMIS) element number. The CA-MMIS Help transaction allows you to look up a description of a field by its element number. The device prompts you to enter and submit the field's element number, and a description of the field is returned to your device screen. The *CA-MMIS Element Numbers* section of the *POS Device User Guide* contains a comprehensive listing of all fields and element numbers.
- **Online Help** – You can also access help while you are in the process of completing the fields of any transaction, including any Systems transaction. In most fields, pressing <F1> returns a description of the current field.

## CA-MMIS Help



### 1. System Menu

Select HELP from the System Menu by pressing the corresponding <F> key. In this example, press <F2>.

## 2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed

To activate the shortcut key feature, refer to the *Device Setup Transaction* section.

## 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <PREV> key to go the NPI entry screen.

If this screen was validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

## 4. Password

The POS device will prompt you to enter your password, which is your Provider Identification Number (PIN). Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.

## device system

# 4

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HELP

CA-MMIS #:

F1

F2

F3

F4

PREV NEXT PRINT EXIT

### 5. CA-MMIS Element Number

The POS device will prompt you to enter the CA-MMIS element number of the field about which you are inquiring. Type the CA-MMIS element number and press <ENTER>.

Refer to the *CA-MMIS Element Numbers* section of the *POS Device User Guide* for a comprehensive listing of all fields and element numbers.

HELP

SEND

RE-EDIT

F1

F2

F3

F4

PREV NEXT PRINT EXIT

### 6. Send/Re-Edit Screen

The Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your Help transaction. Continue at step 8.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 7.

HELP

ENTER SHORTCUT KEY

F1

F2

F3

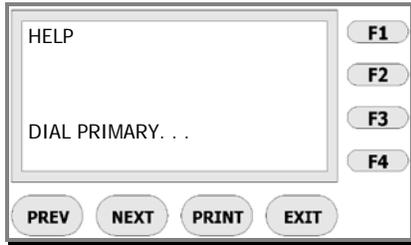
F4

PREV NEXT PRINT EXIT

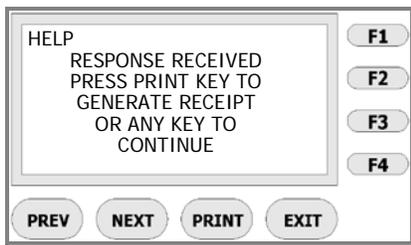
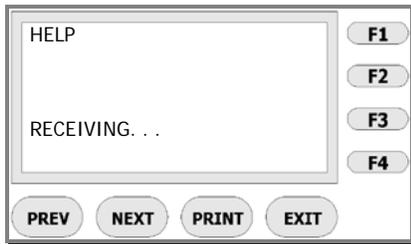
### 7. If you pressed <F2> (RE-EDIT) in step 6, the POS device will display the first screen of your CA-MMIS Help transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <NEXT> and <PREV> function keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.

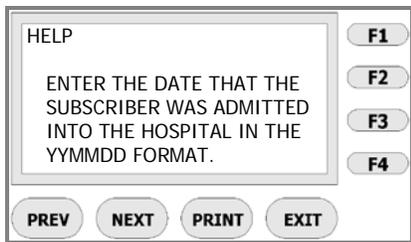


8. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



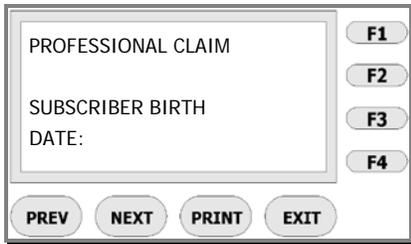
9. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



10. The screen displays a description pertaining to the CA-MMIS element number entered. In this example screen, a description for CA-MMIS element number 1406 (Hospitalization From Date) displays.

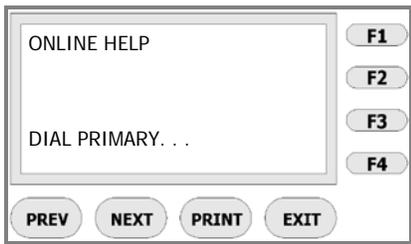
Online Help



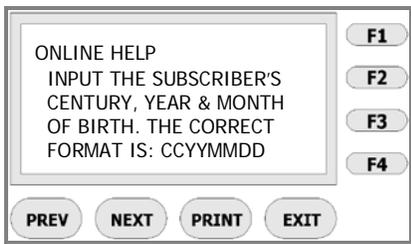
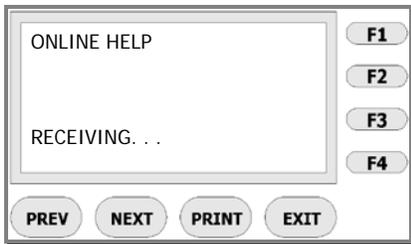
1. You can press <F1> in most screens of any transaction, including any Systems transaction, to activate the Online Help function. This generates a Help transaction for that field. After a few moments, a description of the field is returned to your screen (refer to step 3).

In this example, a description is being sought for the *Subscriber Birth Date* field of the 837 Professional Claim transaction.

**Note:** Online Help is **not** available in the Send/Re-Edit screen of any transaction. Pressing <F1> in any Send/Re-Edit screen submits the transaction for processing.



2. After you press <F1>, several screens display, including the screens at left, while the transaction is processing.



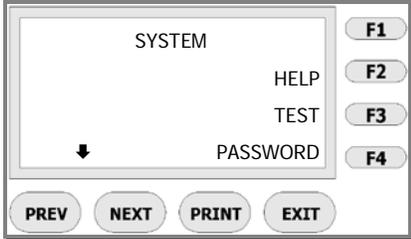
3. After a few moments, a description of the field displays. You can print the description by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard. Press <ENTER> to return to your incomplete transaction.

In this example, the description returned pertains to the *Subscriber Birth Date* field of the 837 Professional Claim transaction.

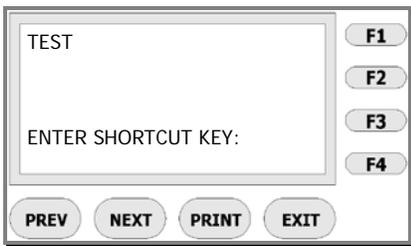
**Connectivity Test Transaction**

The Connectivity Test transaction serves two purposes:

- It activates the appropriate POS device transaction software, which varies depending on the provider type.
- It enables providers to advise the DHCS Fiscal Intermediary (FI) electronically that they have received and are using the POS device.



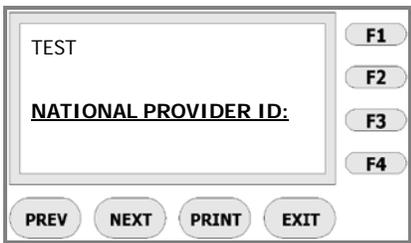
1. Select "TEST" from the System Menu by pressing the corresponding <F> key. In this example, press <F3>.



2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

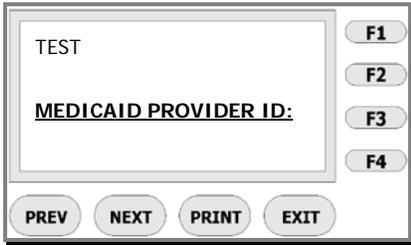
To activate the shortcut key feature, refer to "Device Setup Transaction."



3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>.

Otherwise with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

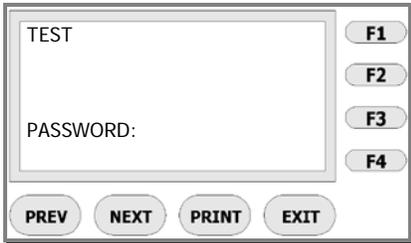


### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID; press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <PREV> key to go the NPI entry screen.

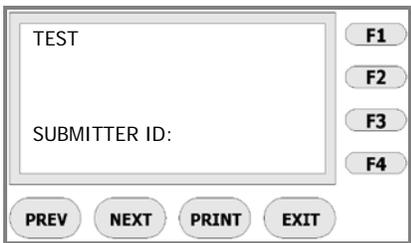
If this screen was validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.



### 4. Password

The POS device will prompt you to enter your password, which is your Provider Identification Number (PIN). Type your password and press <ENTER>. For security purposes, the screen displays asterisks instead of your password.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.



### 5. Submitter ID

The POS device will prompt you to enter your submitter ID. Type your submitter ID and press <ENTER>.



### 6. Send/Re-Edit Screen

The Send/Re-Edit screen displays. Options are as follows:

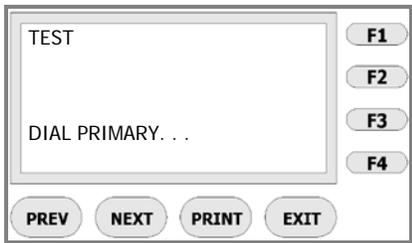
- Press <F1> (SEND) to submit your test transaction. Continue at step 8.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 7.



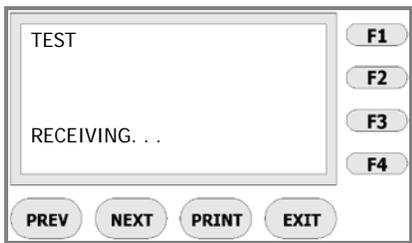
7. If you pressed <F2> (RE-EDIT) in step 6, the POS device will display the first screen of your test transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <NEXT> and <PREV> keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.

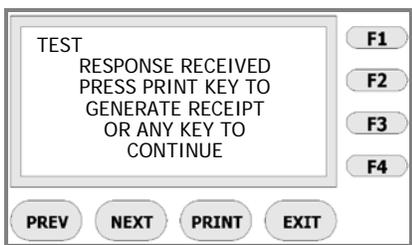


8. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



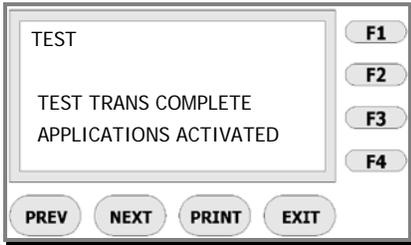
9. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



device system  
10

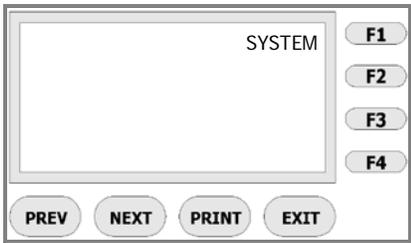
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10. You can scroll through the response using the <NEXT> and <PREV> keys. After viewing the final screen of the response, press <ENTER> to view any provider mail.



11. Upon successful completion of the test transaction, press <CANCEL> to return to the Main Menu screen, which displays the transactions activated on your device.

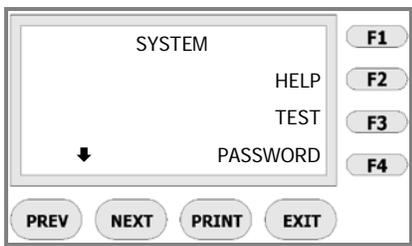


## Password Reset Transaction

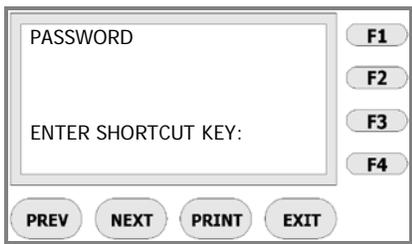
The Password Reset transaction resets your POS device password in the event you wish to change your password or you cannot recall your password. This password is required to perform all POS device transactions.

To perform a Password Reset transaction, you first need to obtain a “dummy” password, which is referred to as “security information.”

You can obtain this dummy password by calling the TSC at 1-800-541-5555 and selecting the option for POS/Internet inquiries. Each time you call the TSC for the password, the password will change.



1. Select PASSWORD from the System Menu by pressing the corresponding <F> key. In this example, press <F4>.



2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen, If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

To activate the shortcut key feature, refer to “Device Setup Transaction.”

### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>.

Otherwise, type your service provider number and press <ENTER>.

### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter a NPI value, press the <PREV> key to go the NPI entry screen.

If this screen has been validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

### 4. Service Provider Security Information

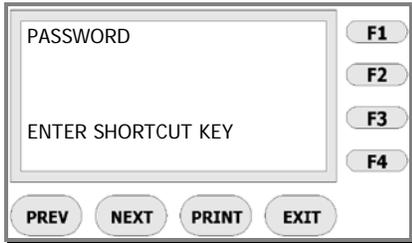
The POS device will prompt you to enter your security information (the dummy password obtained by calling the TSC). Enter the security information obtained from the TSC and press <ENTER>.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.

### 5. Send/Re-Edit Screen

The Send/Re-Edit screen displays. Options are as follows:

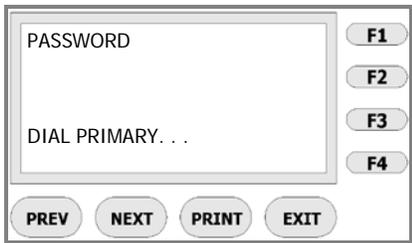
- Press <F1> (SEND) to submit your Password Reset transaction. Continue at step 7.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 6.



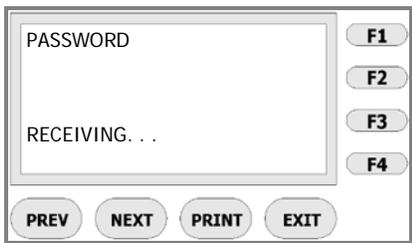
6. If you pressed <F2> (RE-EDIT) in step 5, the POS device will display the first screen of your Password Reset transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <NEXT> and <PREV> keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.

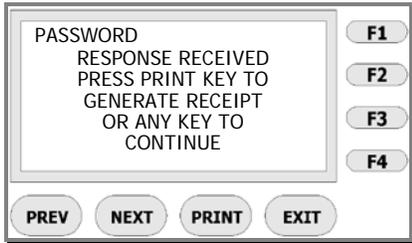


7. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



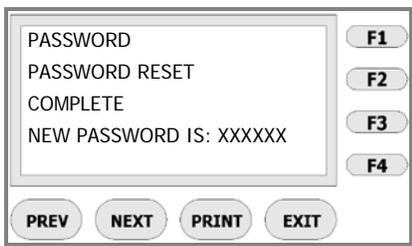
## device system 14

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8. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



9. You can scroll through the response using the <NEXT> and <PREV> keys. The response includes your new POS device password.

After viewing the final screen of your response, press <ENTER> to view any provider mail.

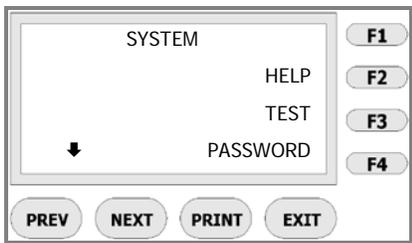
**Note:** If you misplace this new password, you must perform another Password Reset transaction.

## Date/Time Transaction

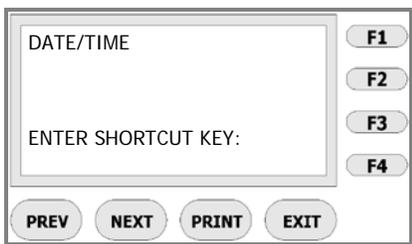
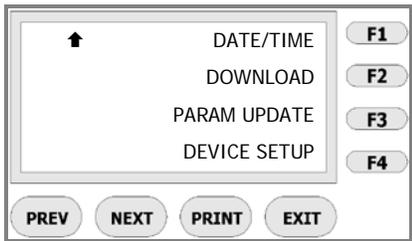
The Date/Time transaction resets the date and time on the POS device to the current California date and time so the operator does not need to initiate any software maintenance for this function

An unsuccessful transaction can be the result of a number of issues such as

- An invalid provider number or password/PIN.
- The system is currently not available.
- The software on the POS device is no longer valid.
- The software requires an immediate upgrade.



1. Select "DATE/TIME" from the System Menu by pressing the corresponding <F> key. If the "DATE/TIME" option is not displayed and you see the (↓) character on the screen, press <NEXT> until the "DATE/TIME" option displays, then press its corresponding function <F> key. In this example, press <F1>.



2. **Shortcut Key**  
The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

To activate the shortcut key feature, refer to the *Device Setup Transaction* section.

DATE/TIME

**NATIONAL PROVIDER ID:**

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

DATE/TIME

**MEDICAID PROVIDER ID:**

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <PREV> key to go the NPI entry screen.

If this screen has been validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

DATE/TIME

PASSWORD:

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

### 4. Password

The POS device will prompt you to enter your password. Enter the password supplied by the TSC and press <ENTER>.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.

DATE/TIME

SEND  
RE-EDIT

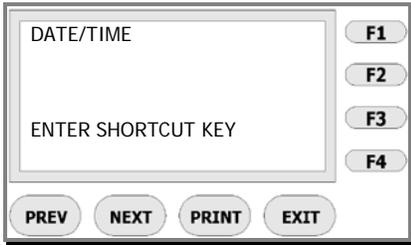
F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

### 5. Send/Re-Edit Screen

The Send/Re-Edit screen options are as follows:

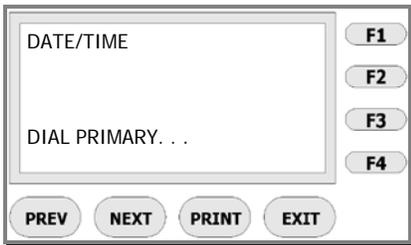
- Press <F1> (SEND) to submit your Date/Time transaction. Continue at step 7.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 6.



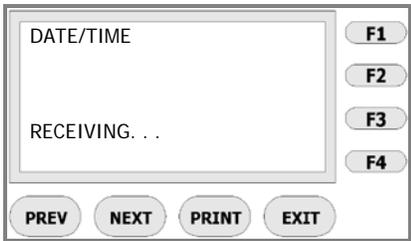
6. If you pressed <F2> (RE-EDIT) in step 5, the POS device will display the first screen of your date/time transaction, the Shortcut Key screen. You can scroll through the screens by pressing <NEXT> and <PREV>.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.

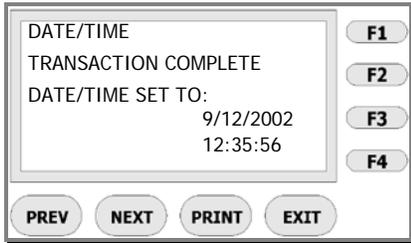


7. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



8. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



9. You can scroll through the response using the <NEXT> and <PREV> keys. The response will indicate the current California date and time.

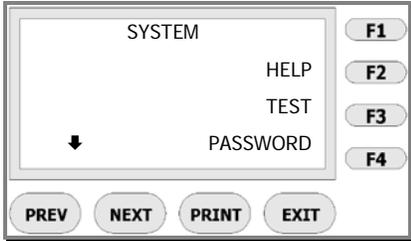
After viewing the final screen of your response, press <ENTER> to view any provider mail.

## Download Transaction

The Download transaction upgrades the software on the POS device to the most current version. There are two types of download transactions and each notifies providers that a software upgrade is available in different ways, as follows:

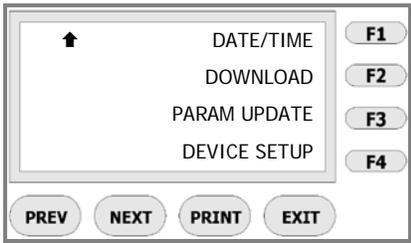
- **Immediate Upgrade** – This type of Download transaction is provider-initiated. If an immediate software upgrade is required, any transaction currently in process will not be accepted by the Medi-Cal system when it is submitted. The device instead returns a message indicating that an immediate software upgrade is required before the transaction can be processed. The device switches to System mode, and you must perform a Download transaction (and a Connectivity Test transaction to activate the software) before proceeding with further transactions.
- **Scheduled Upgrade** – This type of Download transaction occurs automatically. With scheduled upgrades, your POS device automatically connects to the POS server at a scheduled time and downloads the latest software version. You are allowed to continue with any transaction currently in progress. The transaction response includes a provider mail message indicating the time for the scheduled upgrade (usually between 5 p.m. and 8 a.m.). **You must leave your device turned on to receive a scheduled upgrade.** After a scheduled upgrade has been downloaded, you must perform a Connectivity Test transaction to activate the software.

Immediate Upgrade



1. System Menu

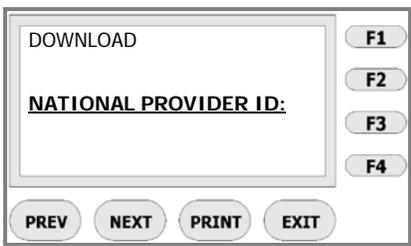
Select "DOWNLOAD" from the System Menu by pressing the corresponding function <F> key. If the "DOWNLOAD" option is not displayed and you see the (↓) character on the screen, press <NEXT> until the "DOWNLOAD" option displays, then press the corresponding <F> key. In this example, press <F2>.



2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

To activate the shortcut key feature, refer to the *Device Setup Transaction* section.



3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

DOWNLOAD

**MEDICAID PROVIDER ID:**

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

3.1 Medicaid Provider ID:

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <PREV> key to go the NPI entry screen.

If this screen has been validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

DOWNLOAD

PASSWORD:

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

4. Password

The POS device will prompt you to enter your password. Type the security password supplied by the TSC and press <ENTER>.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.

DOWNLOAD SEND

RE-EDIT

F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

5. Send/Re-Edit Screen

The Send/Re-Edit screen displays. Options are as follows:

- Press <F1> (SEND) to submit your Download transaction. Continue at step 7.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 6.

DOWNLOAD

ENTER SHORTCUT KEY

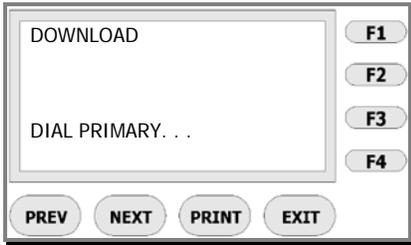
F1  
F2  
F3  
F4

PREV NEXT PRINT EXIT

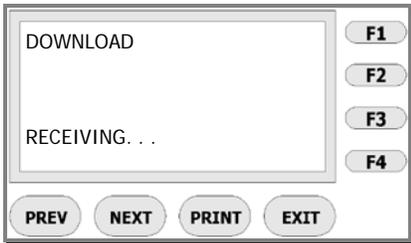
6. If you pressed <F2> (RE-EDIT) in step 5, the POS device will display the first screen of your Download transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <NEXT> and <PREV> keys.

To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

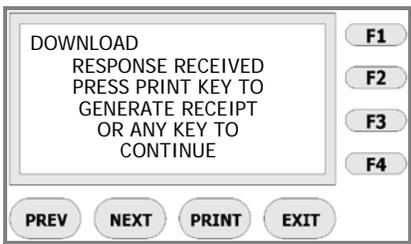
Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.



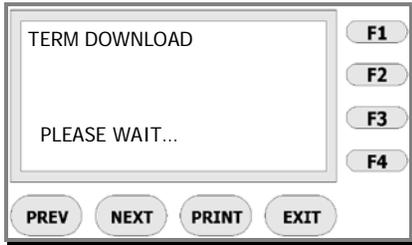
7. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



8. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

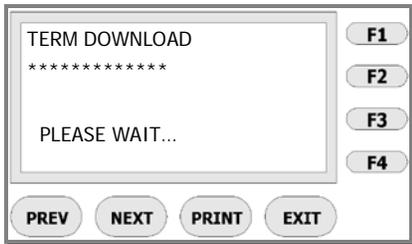
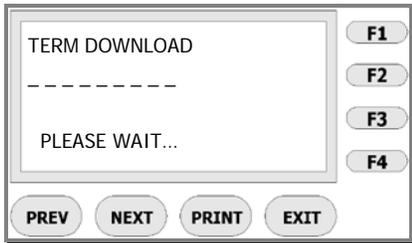


When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



9. The device begins the download process. As the download progresses, the dashes (–) change to asterisks (\*).

The download process may take up to 12 minutes, depending on how much new software is being downloaded.

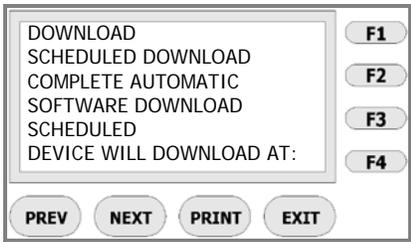


10. The welcome screen displays when the transmission is complete.

**Note:** After the download, you must perform a Connectivity Test transaction to activate the software. Refer to the *Connectivity Test Transaction* section



## Scheduled Upgrade



1. After a scheduled upgrade, a screen displays indicating the download is complete.



2. The welcome screen displays when the transmission is complete.

**Note:** After the download, you must perform a connectivity test transaction to activate the software. Refer to the *Connectivity Test Transaction* section in this guide.

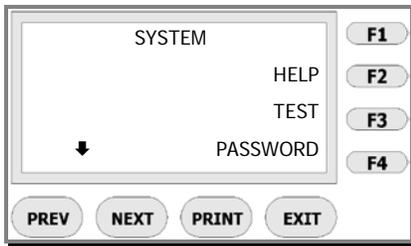
### Parameter Update

The parameter update transaction is used to change values within the device when errors occur with the following:

- Primary telephone number
- Secondary telephone number
- Modem speed
- Date format
- Receipt header and footer

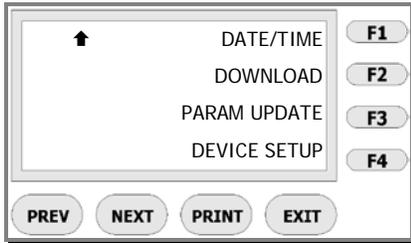
These values can only be changed in your POS device under the direction of a TSC operator.

Refer to the *Troubleshooting* section of the *POS Device User Guide* for error descriptions and solutions. If you cannot locate an error description or do not understand an error message, call the TSC at 1-800-541-5555 and select the option for POS/Internet inquiries. The operator may instruct you to perform a Parameter Update transaction.



#### 1. System Menu

Select "PARAM UPDATE" from the System Menu by pressing the corresponding function <F> key. If the "PARAM UPDATE" option is not displayed and you see the (↓) character on the screen, press <NEXT> until the "PARAM UPDATE" option displays, then press its corresponding <F> key. In this example, press <F3>.



#### 2. Shortcut Key

The POS device will prompt you to enter your shortcut key. If you have activated this feature, type your shortcut key and press <ENTER>. If the shortcut key entered is associated with a National Provider ID (NPI), the next screen displayed will be the NPI screen. If the shortcut key entered is associated with a Medicaid Provider ID, the next screen displayed will be the Medicaid Provider ID screen. Otherwise, press <ENTER> to bypass this screen and the NPI entry screen will be displayed.

To activate the shortcut key feature, refer to the *Device Setup Transaction* section.

A screenshot of a terminal window titled "PARAM UPDATE". The main display area contains the text "NATIONAL PROVIDER ID:" followed by a blank input field. To the right of the input field are four function keys labeled F1, F2, F3, and F4. Below the input field are four navigation buttons labeled PREV, NEXT, PRINT, and EXIT.

### 3. National Provider ID

If you entered a shortcut key associated with an NPI in the previous step, this screen will automatically display your National Provider ID. Press <ENTER> to accept the displayed value, or you may type in another NPI value and press <ENTER>. Otherwise with the NPI field blank, press <ENTER> to display the Medicaid Provider ID screen.

A screenshot of a terminal window titled "PARAM UPDATE". The main display area contains the text "MEDICAID PROVIDER ID:" followed by a blank input field. To the right of the input field are four function keys labeled F1, F2, F3, and F4. Below the input field are four navigation buttons labeled PREV, NEXT, PRINT, and EXIT.

#### 3.1 Medicaid Provider ID

If you entered a shortcut key associated with a Medicaid Provider ID in the shortcut key screen, this screen will automatically display your Medicaid Provider ID. Press <ENTER> to accept the displayed value, or you may type in another Medicaid Provider ID and press <ENTER>.

If the NPI screen had an empty entry, this screen must have a value before proceeding. If you would like to enter an NPI value, press the <PREV> key to go the NPI entry screen.

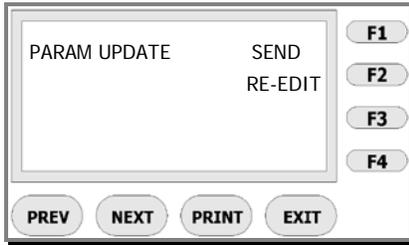
If this screen has been validated and you would rather use an NPI value, leave the value in this screen as is. Press the <PREV> function key to go to the NPI entry screen. After you validate an NPI entry by pressing <ENTER>, the value in this screen will be purged.

A screenshot of a terminal window titled "PARAM UPDATE". The main display area contains the text "SERVICE PROVIDER SECURITY INFORMATION:" followed by a blank input field. To the right of the input field are four function keys labeled F1, F2, F3, and F4. Below the input field are four navigation buttons labeled PREV, NEXT, PRINT, and EXIT.

### 4. Service Provider Security Information

The POS device will prompt you to enter your service provider security information. Enter the security information supplied by the TSC and press <ENTER>.

Press the <PREV> key to go to the prior field entered. If valid data was entered in the Medicaid Provider ID field, pressing the <PREV> key displays the Medicaid Provider ID. If valid data was entered in the National Provider ID field, pressing the <PREV> key displays the National Provider ID.



5. Send/Re-Edit Screen

The Send/Re-Edit screen displays. Options are as follows:

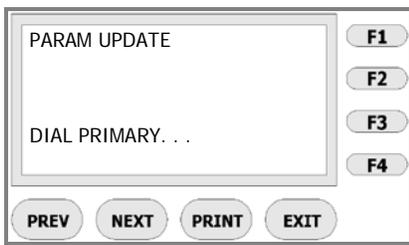
- Press <F1> (SEND) to submit your Param Update transaction. Continue at step 7.
- Press <F2> (RE-EDIT) to edit your entries. Continue at step 6.



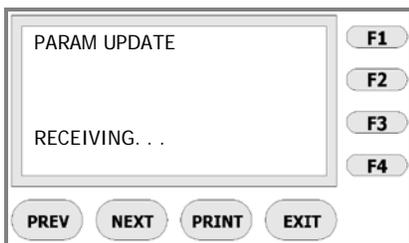
6. If you pressed <F2> (RE-EDIT) in step 5, the POS device will display the first screen of your Param Update transaction, the Shortcut Key screen. You can scroll through the screens by pressing the <NEXT> and <PREV> keys.

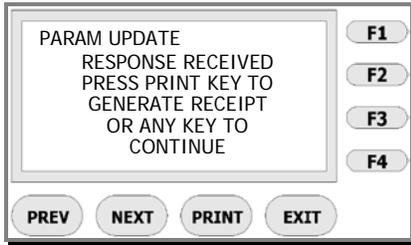
To replace an entry, type in a new entry and press <ENTER>. The new entry replaces the previous entry. To change characters in an entry, press <BACKSPACE> until you delete the incorrect character. Re-type the entry from that character forward.

Once all entries have been verified and are correct, you can return to the Send/Re-Edit screen by pressing <EXIT> or by continuing to press <NEXT> or <ENTER> until the Send/Re-Edit screen again displays. Press <F1> (SEND) to submit the transaction.



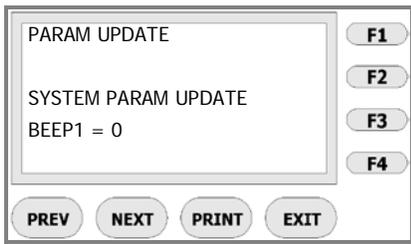
7. After you press <F1> (SEND), several screens display, including the screens at left, while the transaction is processing.



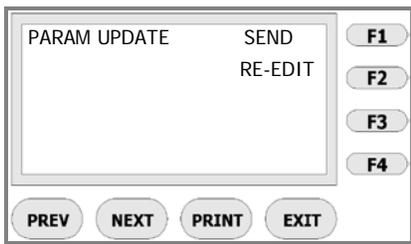


8. Shortly after submitting the transaction, the POS device will display a message indicating that it has received a response from the Medi-Cal system.

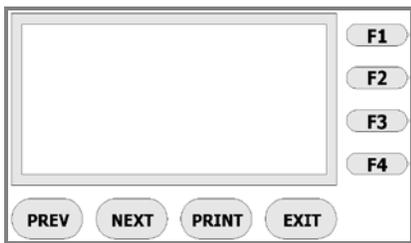
When the POS device indicates it has received a response, you can press any key to view the response. You can print the response by pressing <PRINT> on the keypad or <F7> or <PrtSc> on the keyboard.



9. You can use the <NEXT> and <PREV> keys to scroll through the response, which indicates the specific parameter that was updated.



10. Press <EXIT> or <CANCEL> to begin the parameter update process on your POS device.



11. The screen goes blank while the device updates the parameter and reboots itself. The Welcome screen displays when the parameter update process is complete.



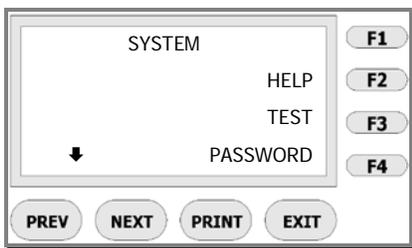
### Device Setup Transaction

The Device Setup transaction allows you to customize your POS device. Providers can access the following options within the Device Setup transaction:

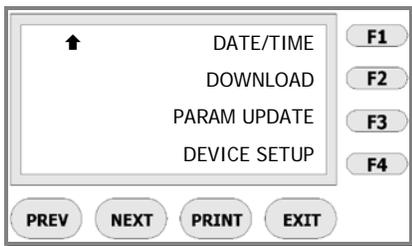
- ABOUT – Displays information about your device.
- PROVIDER – Allows you to customize your POS device. For example, you can add your own content to the receipt header and footer, which will print on every receipt. You can also add up to 10 provider numbers and set up shortcut keys for specific provider numbers to reduce keying errors (refer to “Edit Shortcut Number” later in this section to set up shortcut keys).
- TERMINAL – Allows you to setup a Private Automatic Branch Exchange (PABX) code.

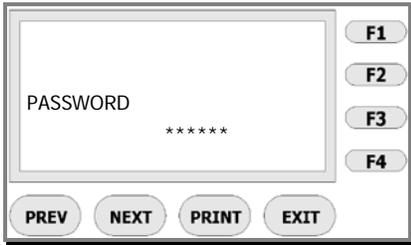
The Device Setup transaction includes the following additional options. However, using these options requires assistance from a TSC operator. **Do not select these options unless instructed to do so by a TSC operator.**

- Comm
- Download
- Printer
- Suite
- Date/Time
- Demo
- Passwords
- Reserved



1. Select “DEVICE SETUP” from the system menu by pressing the corresponding function <F> key. If the “DEVICE SETUP” option is not displayed and you see the (↓) character on the screen, press <NEXT> until the “DEVICE SETUP” option displays, then press its corresponding <F> key. In this example, press <F4>.

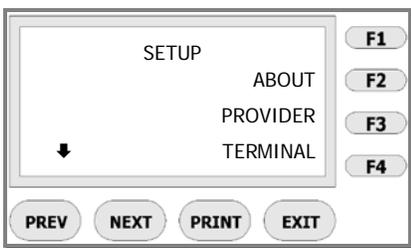




2. Password

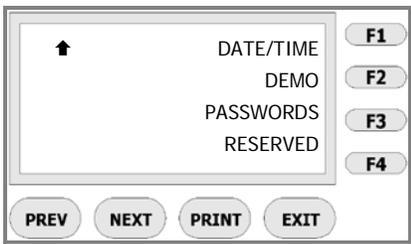
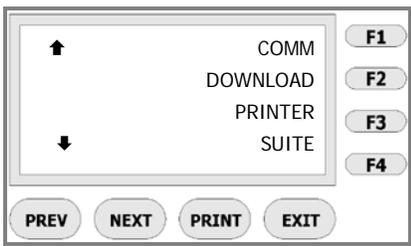
The POS device prompts you to enter your password. Enter your password and press <ENTER>. If you have not changed the password, the default password is six zeros ("000000").

The screen displays asterisks instead of your password for security purposes.



3. Device Setup Menu

The Device Setup Menu displays. Select a transaction by pressing the corresponding <F> key. Press <NEXT> to scroll through the full list. Press the <PREV> function key to return to the top of the list

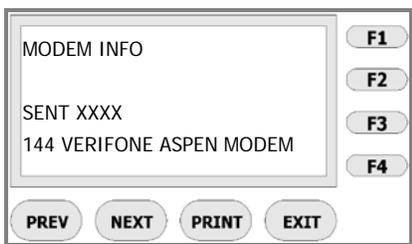
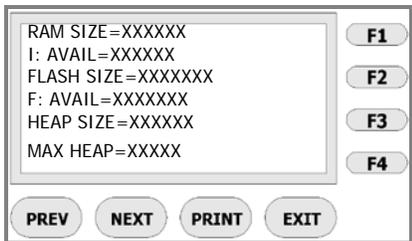
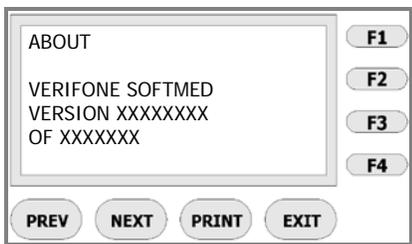
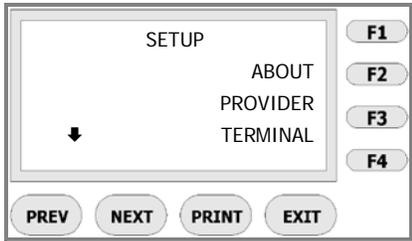


The “About” Option

The “About” option displays information about your device.

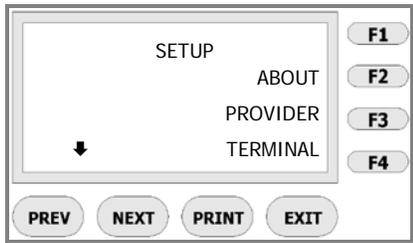
1. Select “ABOUT” from the Device Setup Menu by pressing the corresponding <F> key. In this example, press <F2>.

Press <NEXT> to scroll through the information. Press <CANCEL> to return to the Device Setup menu.

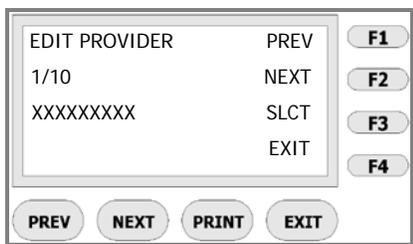


## The “Provider” Option

The “Provider” option allows you to customize your POS device. For example, you can add your own content to the receipt header and footer, which will print on every receipt. You can also add up to 10 provider numbers and set up shortcut keys for specific provider numbers to reduce keying errors (refer to “Edit Shortcut Number” later in this section to set up shortcut keys).



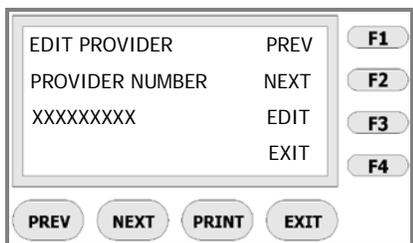
1. Select “PROVIDER” from the device setup menu by pressing the corresponding function <F> key. In this example, press <F3>.



2. Edit Provider

The Main Provider screen displays the first provider number record available for editing. You can use the <PREV> and <NEXT> keys to scroll through the complete list of available provider numbers. The “SLCT” option selects the provider number record you wish to edit. The “EXIT” option returns you to the Device Setup Menu.

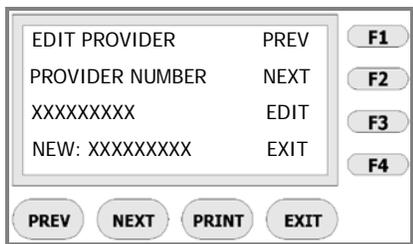
Scroll through the provider numbers until you find the one you wish to edit, then press the corresponding <F> key for “SLCT.”



3. The provider number record you selected displays. To edit the record, press the <F> key corresponding to “EDIT.”

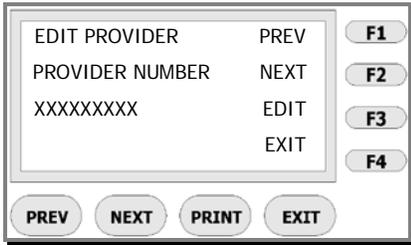
You can edit the following for a provider number record:

- Provider number
- Header and footer information
- Shortcut key (edit and/or initial setup)

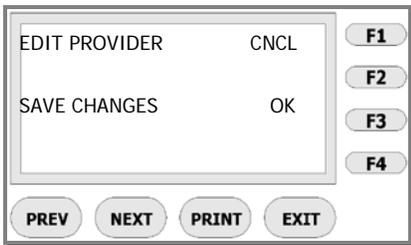


4. Edit Provider Number

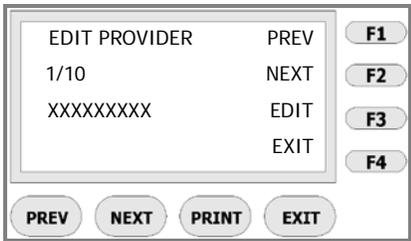
To update the provider number record, enter the new provider number and press <ENTER>.



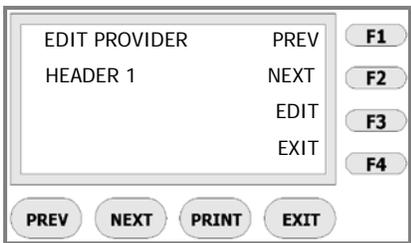
5. The provider number you entered displays. Press the <F> key corresponding to "EXIT", and the device will prompt you to save your changes.



6. Press the <F> key corresponding to "OK" to save your changes. Press the <F> key corresponding to "CNCL" to cancel your changes.



7. The "OK" option returns you to the main edit provider screen. From this screen, you can perform other functions to customize your POS device.

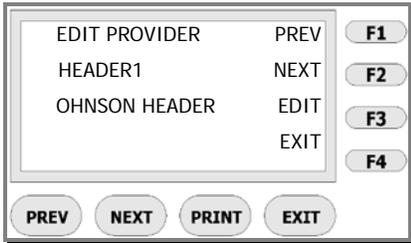


8. Edit Header # 1 and # 6

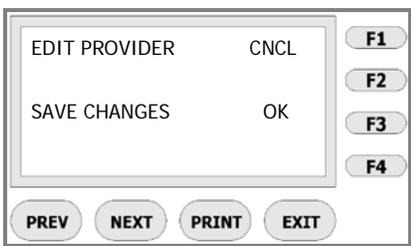
The "Edit Provider" option allows you to update the header information for the provider number record.

Press the <F> key corresponding to "EDIT" to display the edit screen. Type the new header information and press <ENTER>.

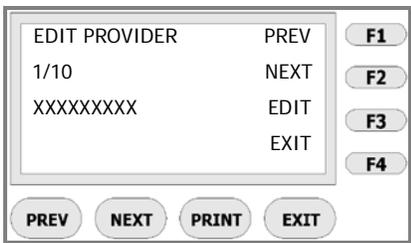
Refer to the *Sample Print Receipts* section of the *POS Device User Guide* for an example of customized header information.



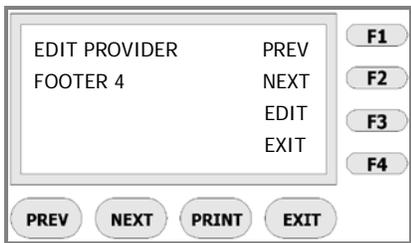
- The header information that you entered displays. Press the <F> key corresponding to "EXIT" and the device will prompt you to save your changes.



- Press the <F> key corresponding to "OK" to save your changes. Press the <F> key corresponding to "CNCL" to cancel your changes.



- The "OK" option returns you to the main Edit Provider screen. From this screen, you can perform other functions to customize your POS device.

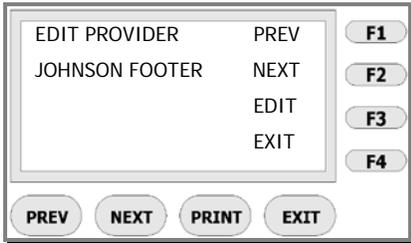


- Edit Footer

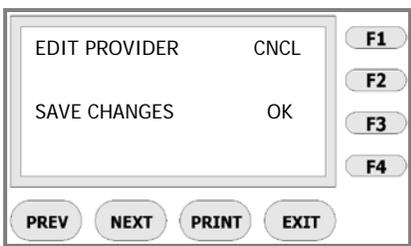
The "Edit Footer" option provider option allows you to update the footer information for the provider number record.

Press the <F> key corresponding to "EDIT" to display the edit screen. Type the new footer information and press <ENTER>.

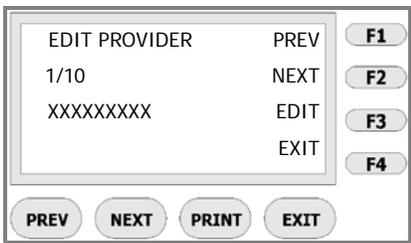
Refer to the *Sample Print Receipts* section of the *POS Device User Guide* for an example of customized footer information.



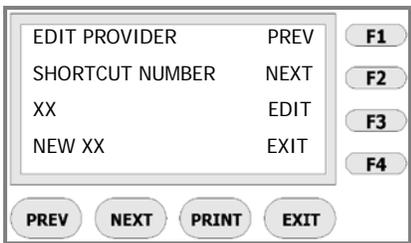
13. The footer information that you entered displays. Press the <F> key corresponding to "EXIT" and the device will prompt you to save your changes.



14. Press the <F> key corresponding to "OK" to save your changes. Press the <F> key corresponding to "CNCL" to cancel your changes.



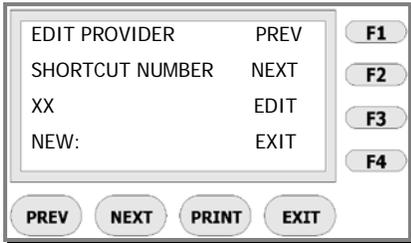
15. The "OK" option returns you to the main Edit Provider screen. From this screen, you can perform other functions to customize your POS device.



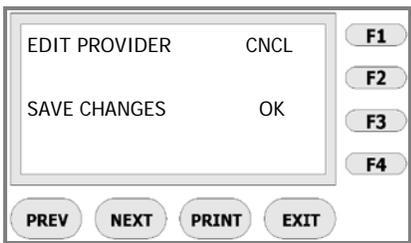
16. Edit Shortcut Number

The "Edit Shortcut Number" option allows you to assign a two-digit number to the provider number record. This can help minimize keying errors.

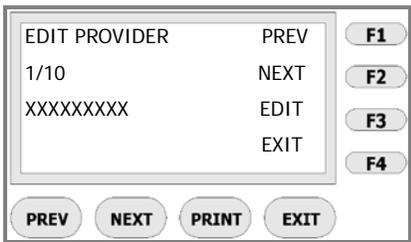
Press the <F> key corresponding to "EDIT" to display the edit screen. Type the shortcut number and press <ENTER>.



17. The shortcut number that you entered displays. Press the <F> key corresponding to "EXIT" and the device will prompt you to save your changes.



18. Press the <F> key corresponding to "OK" to save your changes. Press the <F> key corresponding to "CNCL" to cancel your changes.

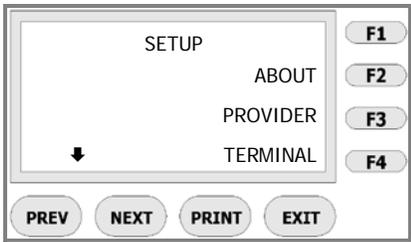


19. The "OK" option returns you to the main Edit Provider screen.

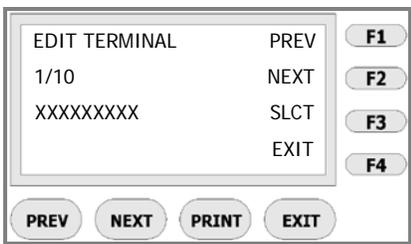
The "Terminal" Option

The "Terminal" option allows you to set up a Private Automatic Branch Exchange (PABX) code.

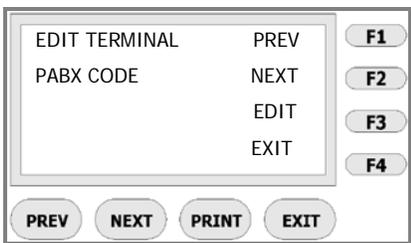
**Note:** The Device Setup Menu contains additional options below the "Terminal" option. **Do not select these options unless instructed to do so by a TSC operator.**



1. Select "TERMINAL" from the device setup menu by pressing the corresponding function <F> key. In this example, press <F4>.



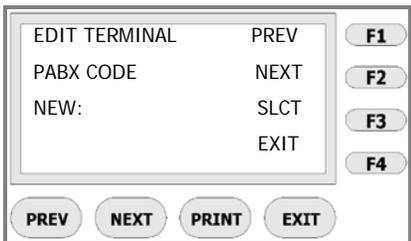
2. Press the <F> key corresponding to "SLCT" to proceed to the next level of editing.

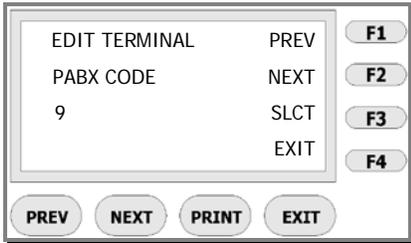


3. Edit PABX Code

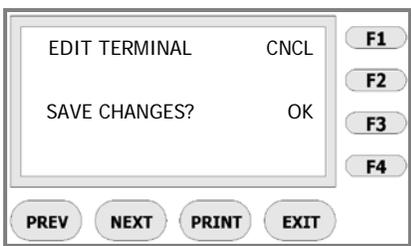
The "Edit PABX Code" option allows you to assign a one- to four-digit number to the device if such a number is needed for connecting with an outside telephone line.

Press the <F> key corresponding to "EDIT" to display the edit screen. Enter the new PABX number and press <ENTER>.

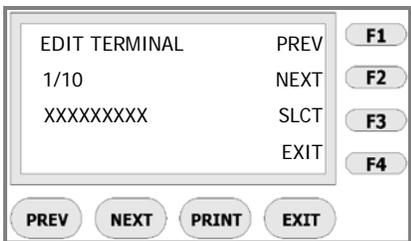




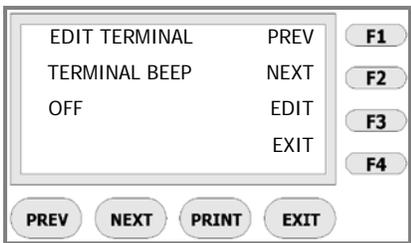
- The PABX number you entered displays. Press the <F> key corresponding to "EXIT" and the device will prompt you to save your changes.



- Press the <F> key corresponding to "OK" to save your changes. Press the <F> key corresponding to "CNCL" to cancel your changes.



- The "OK" option returns you to the main Edit Terminal screen. From this screen, you can set up other functions on your POS device.

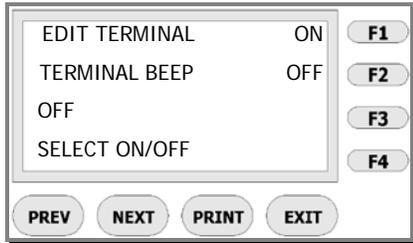


- Edit Terminal Beep

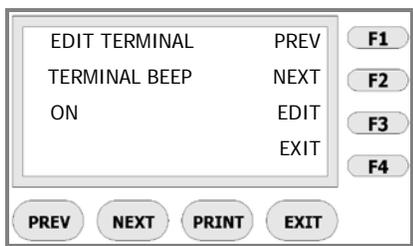
The "Edit Terminal Beep" option allows you to turn the beep function on or off. In the "ON" mode, the device will beep when keys are pressed.

The default beep mode is "OFF." However, the device will still beep for input errors and responses.

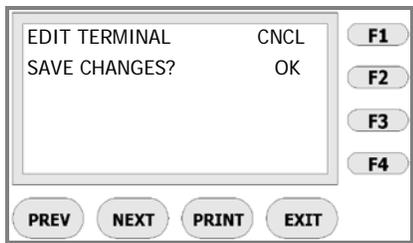
Press the <F> key corresponding to "EDIT."



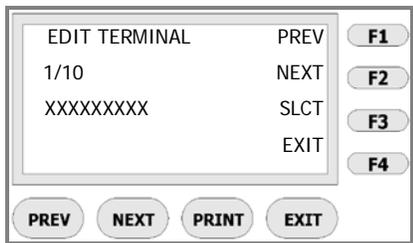
8. The device prompts you to select “ON” or “OFF.” Select a mode by pressing the corresponding function <F> key.



9. The mode you selected displays. Press the <F> key corresponding to “EXIT” and the device will prompt you to save your changes.



10. Press the <F> key corresponding to “OK” to save your changes. Press the <F> key corresponding to “CNCL” to cancel your changes.



11. The “OK” option returns you to the main Edit Terminal screen. From this screen, you can set up other functions on your POS device.