EASYGroup™ Payment System Interface (PSI) Installation Guide

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1 Overview

This chapter provides an overview of this manual and how to contact Optum. It contains the following sections:

• Introduction to This Guide
• Intended Audience
• Organization of This Guide
• Document Conventions
• About Optum
• Contact Us
  - Corporate Address
  - Need Assistance? Contact Optum Client Services
  - Optum Portals
  - Found an Error in This User’s Guide?
1.1 Introduction to This Guide

The EASYGroup™ Payment System Interface (PSI) Installation Guide contains all the essential information the user will need to be able to install and configure the EASYGroup™ PSI. Consider this guide your *textbook*, a ready reference source should you forget a procedure or encounter a problem.

1.1.1 Intended Audience

This guide is directed to:
- Information Technology Personnel
- System Administrators

1.2 Organization of This Guide

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<td>Gives an overview of this user’s guide and what it contains, as well as an introduction to Optum.</td>
</tr>
<tr>
<td>Chapter 2, Hardware/Software Requirements</td>
<td>Defines the hardware and software requirements needed to run the EASYGroup™ PSI application successfully.</td>
</tr>
<tr>
<td>Chapter 3, Installation Procedures</td>
<td>Includes the installation procedures for the EASYGroup™ PSI application.</td>
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<td>List of Figures</td>
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<tr>
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1.3 Document Conventions

This guide uses the following conventions:

- Any screen fields, buttons, tabs, or other controls that you can manipulate are printed in **bold** type. Keys that you press on the keyboard are also printed in **bold** type. For example:
  - Press the **Exit** button.
  - Press the **Enter** key.

- Keyboard keys that you must press simultaneously are printed in **bold** type and separated by a plus (+) sign. For example:
  - Press **Ctrl + C**.

- Links embedded in the text that you can select to jump to another section are in orange. For example:
  - Mappers
• Field names for the C Platform and filenames are italicized. For example:
  - pricer_rtn_code
  - EASYGroup.exe
• Field description titles are printed in **bold** type:
  - NICU Accreditation Indicator
• Legislation titles are italicized. For example:
  - Balanced Budget Act of 1997
• CMS Transmittals will be written in the following format:
  - CMS Transmittal No. R2220CP *(Update - Inpatient Psychiatric Facilities Prospective Payment System (IPF PPS) Rate Year 2012)*

### 1.4 About Optum

Optum is a health services business dedicated to making the health system work better for everyone. At Optum, we help modernize the health ecosystem, by bringing inter-operable and connected technology, real-time information, streamlined administration and managed compliance, risk, and costs.

### 1.5 Contact Us

#### 1.5.1 Corporate Address

Optum  
11000 Optum Circle  
Eden Prairie, MN. 55344  
T 1 + (888) 445-8745  
[www.optum.com](http://www.optum.com)

#### 1.5.2 Need Assistance? Contact Optum Client Services

We welcome you as a valued client. Please contact Optum Client Services using one of the methods detailed below.

When opening a ticket with Optum Client Services you will be issued a ticket number. These ticket numbers correlate to individual issues. If you are experiencing multiple issues, it is recommended that you obtain individual ticket numbers.

When calling Optum Client Services regarding a previously opened ticket, have your ticket number available. If you misplaced or did not receive a ticket number, please ask the technician to provide it to you.

**Optum Client Services Phone:** 800-999-DRGS (3747)

1. Calls are answered in the order that they are received. If there is a high call volume, calls are held in a queue until a technician becomes available.
2. Calls classified as an industry expert category (i.e., case and reimbursement, logic encoder, etc.) will be escalated to Optum experts.

3. Technicians are available 24/7.

After selecting **Option 6 for Technical Support** you will hear the following choices:

**Table 1-2: Technical Support Options**

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<td>For password reset, login issues, or expiration error.</td>
</tr>
<tr>
<td>Option 2</td>
<td>For all other issues.</td>
</tr>
</tbody>
</table>

**Email:** [Optum Client.Services](mailto:Optum.Client.Services)  
1. Include name and number and detailed description of product issue.  
2. Response time to email is generally within a few business hours.  
3. Service technician has ability to do prior research before calling back.

### 1.5.3 Optum Portals

For access to announcements, user documentation, notices, release schedules, and much more please visit the [Optum Client Portal](https://www.optum.com) and/or the [Regulatory Portal](https://www.optum.com).

### 1.5.4 Found an Error in This User's Guide?

Please feel free to contact our EASYGroup™ Documentation Team with any errors you may have found within this user’s guide:

[EasyGroup_Documentation](https://www.optum.com)

We welcome feedback from our clients.
2 Hardware/Software Requirements

This chapter provides the hardware and software requirements for the EASYGroup™ PSI application.

This chapter contains the following sections:

• General Requirements
  - Hardware Requirements
  - Software Requirements
2.1 General Requirements

To use the EASYGroup™ PSI, your operating environment must meet or exceed the following hardware and software requirements. EASYGroup™ PSI should be setup in four separate environments for optimal performance. These environments are as follows and shown below in Figure 2-1:

- **EASYGroup™ Environment** - This is where the EASYGroup products are stored.
- **Database Environment** - This is where the PSI database(s) are stored.
- **PSI User Interface Environment** - This is where the PSI Interface is stored.
- **PSI API Environment** - This is where the PSI API is stored.

Figure 2-1. PSI Environment Setup Diagram
2.1.1 Hardware Requirements

**Note**
Optum strongly recommends that users utilize the below recommendations for optimal performance.

For the EASYGroup™ and User Interface environments, Optum recommends installing these environments on a drive other than the C:\ drive.

• **EASYGroup™ Environment:**
  - Processor: 2.0GHz Dual Core (Minimum); 3.0GHz Quad Core (Recommended)
  - RAM: 32+ GB RAM**
  - Hard Disk: 256+ GB disk space*

** Size dependent on the volume of content.
* Size dependent on the volume of claims.

• **Database Environment:**
  - Processor: 2.0GHz Dual Core (Minimum); 3.0GHz Quad Core (Recommended)
  - RAM: 32+ GB RAM**
  - Hard Disk: 256+ GB disk space*

** Size dependent on the volume of content.
* Size dependent on the volume of claims.

• **PSI User Interface Environment:**
  - Processor: 2.0GHz Dual Core (Minimum); 3.0GHz Quad Core (Recommended)
  - RAM: 8+ GB RAM**
  - Hard Disk: 50+ GB disk space*

** Size dependent on the volume of content.
* Size dependent on the volume of claims.

• **PSI API Environment:**
  - Processor: 2.0GHz Dual Core (Minimum); 3.0GHz Quad Core (Recommended)
  - RAM: 8+ GB RAM**
  - Hard Disk: 50+ GB disk space*

** Size dependent on the volume of content.
* Size dependent on the volume of claims.
2.1.2 Software Requirements

- **Client Workstation(s)**
  The user’s workstation that connects to the PSI environments below must have one of the following supported internet browsers:
  - Google Chrome™
  - Microsoft® Edge Chromium

- **EASYGroup™ Environment:**
  - Microsoft® Windows® Server 2012 R2 (Minimum); Microsoft® Windows® Server 2016; Microsoft® Windows® Server 2019 (Recommended)
  - Microsoft® ASP .NET Hosting Bundle Core Version 3.1.0 or higher
  - Microsoft® Powershell 4.0 or higher
  - Internet Information Services (IIS) V10 or higher
  - Java™ 8 or higher (if using payment systems that utilize the 3M™ GPS)
  - Microsoft® Visual C++ Redistributable V2015 or higher
  - Microsoft® OLE DB Driver 18 for SQL Server®

- **Database Environment:**
  - Microsoft® Windows® Server 2012 (Minimum); Microsoft® Windows® Server 2016; Microsoft® Windows® Server 2019 (Recommended)
  - Microsoft® SQL Server 2016 Service Pack 1 or higher with a Database Compatibility Level of 130 or higher
  - Microsoft® OLE DB Driver 18 for SQL Server®

- **PSI User Interface Environment:**
  - Microsoft® Windows® Server 2012 R2 (Minimum); Microsoft® Windows® Server 2016; Microsoft® Windows® Server 2019 (Recommended)
  - Microsoft® ASP .NET Hosting Bundle Core Version 3.1.0 or higher
  - Microsoft® Powershell 4.0 or higher
  - IIS V10 or higher

- **PSI API Environment:**
  - Microsoft® Windows® Server 2012 R2 (Minimum); Microsoft® Windows® Server 2016; Microsoft® Windows® Server 2019 (Recommended)
  - Microsoft® ASP .NET Hosting Bundle Core Version 3.1.0 or higher
  - Microsoft® Powershell 4.0 or higher
  - IIS V10 or higher
3 Installation Procedures

This chapter provides the installation procedures for EASYGroup™ PSI. This chapter contains the following sections:

• Installing EASYGroup™ PSI
  - New Installations
  - Updating an Existing Installation
  - The PSI Wizard
  - Removing an Existing Installation
3.1 Installing EASYGroup™ PSI

Before installing EASYGroup™ PSI, please make sure you have:

1. Confirmed that the Hardware/Software Requirements have been met for all environments.
2. Engaged your Database Administrator and Network Security Administrator.

3.1.1 New Installations

To install the EASYGroup™ PSI application for the first time, perform the following steps:

1. Download the EASYGroup™ PSI installer (EASYGroupPSI_Vnnnn.nn.exe) which can be located on the Optum Client Portal, as well as the Optum Update Wizard.

Note

The Vnnnn.nn in the above filename equals the version number (e.g., V2004.03).

2. As an Administrator, run the EASYGroupPSI_Vnnnn.nn.exe.
3. In the **Welcome Setup** screen, select **Next** to continue with the installation.

Figure 3-1. PSI Welcome Setup Screen
4. Carefully read the license agreement. Click the I accept the license agreement, required to continue this install radio button to agree and select Next.

Figure 3-2. License Agreement Screen
5. In the **Select Features** screen, select the type of installation you want.

   **For the EASYGroup™ Environment**, check the following:
   - **Web Claims-Processing Components** - This installs the web service API.
   - **Batch Claims-Processing Components** - This installs the batch processing engine.
   - **Database Scripts** - This installs the PSI database.

   **For the PSI User Interface Environment**, check the following:
   - **User Interface Components** - This installs the PSI user interface.

   **For the API Environment**, check the following:
   - **API Components** - This installs the PSI Application Programming Interface (API) files.

   The **Select Features** screen also checks if the recommended versions of Microsoft® ASP .NET Core and Internet Information Services (IIS) have been installed. Select **Next**.
6. In the **Choose Destination Location** screen, you can either choose to install to the default location \( (C:\Optum\EASYGroupPSI) \) or click the **Browse** button to select a different location. Select **Next**.

**Note**
Optum recommends installing the PSI components on a drive other than C:\ when possible.

Figure 3-4. Choose Destination Location Screen
7. The EASYGroup™ PSI installer will now begin to configure your installation as shown in the **Setup Status** screen.

Figure 3-5. Setup Status Screen
8. Once the installation process has been completed, the **Install Shield Wizard Complete** screen will appear. Select **Finish**.

Figure 3-6. Install Shield Wizard Complete Screen

9. The installer will now take you through the steps outlined in the **The PSI Wizard** section.

### 3.1.2 Updating an Existing Installation

To update the EASYGroup™ PSI application to a newer version, perform the following steps:

1. Download the new version of the EASYGroup™ PSI installer (**EASYGroupPSI_Vnnnn.nn.exe**) from the [Optum Client Portal](https://www.optum.com) or the Optum Update Wizard.

   **Note**
   
   The `Vnnnn.nn` in the above filename equals the version number (e.g., `V2004.03`).

2. As an Administrator, run the **EASYGroupPSI_Vnnnn.nn.exe**.
3. You will see the **EASYGroup™ PSI Setup** screen which indicates the installed version and the version you are updating to. Click **Next** to continue with the update.

Figure 3-7. EASYGroup™ PSI Setup Screen When Updating an Installed Version

4. The installer will now take you through the steps outlined in the **The PSI Wizard** section.
3.1.3 The PSI Wizard

1. The PSI Wizard will launch automatically. The checkmarks represent the components that have been installed on this environment and will now be configured by the PSI Wizard. Select **Next**.

![Figure 3-8. PSI Wizard](image)

**Note**

The following steps may differ depending on the environment you are installing/updating.
2. The **Requisite Settings** screen will appear and show you any requirements that have not yet been met depending on the environment you are installing. **All these requirements must be met before you can continue.** Download and install any items that are shown with a red X. Items shown with a green check mark do not need to be downloaded/installed. Clicking the Microsoft® OLE DB Driver 18 for SQL Server® hypertext will initiate the installation of this program. Once you have installed any items that were shown with a red X, select the **Refresh List** button. Select **Next**.

Figure 3-9. Requisite Settings Screen

![Requisite Settings Screen](image-url)
3. In the **Secure Service Account** screen, enter the service account that will be used to communicate between all the EASYGroup™ PSI components. Select **Next**.

If the entered service account does not exist or the password is incorrect, an error message will appear as shown below in **Figure 3-11**.

**Important**

This account should be part of an Active Directory Group with administrative access on the PSI User Interface and EASYGroup™ environments. It will only need sufficient access to be created in, and assigned ownership of, the databases on the PSI Database environment.

**Figure 3-10. Secure Service Account Screen**

![Secure Service Account Screen](image-url)
Figure 3-11. Secure Service Account Invalid Message

Warning

The account supplied does not exist or is not available on this network. Please try a different account.

Note: Be sure to prefix the user name with the proper domain.

OK
4. In the **Data Location Setup** screen, select the **Browse** button to select a location other than the default location. Click the **Restore Defaults** button to undo any modifications and use the default paths prior to continuing to the next step in the Wizard.

**Batch File Watch Path** - This is where you will need to drop batch claim files to be imported or process by PSI. This is also the location where batch claim file results are exported. The default location is defined in the `TARGETDIR\FileWatch` under the **EASYGroup/Payment System Interface** node of the `HSSSetup.ini` file.

**Root Paths** - This is where your EASYGroup™ payment system programs and data files are installed and located. The default location is defined in the `TARGETDIR` under the **EASYGroup/Payment System Interface** node of the `HSSSetup.ini` file.

- **Data Root Path** - The default location is defined in the `ServerDataDir` under the **EASYGroup** node of the `HSSSetup.ini` file. If modified, the `HSSSetup.ini` file will be updated with the modified path.

- **Optimizer Root Path** - The default location is defined in the `ServerDir64` under the **EASYGroup** node of the `HSSSetup.ini` file. If modified, the `HSSSetup.ini` file will be updated with the modified path.

Select **Next**.

Figure 3-12. Data Location Setup Screen
5. The **Database Setup** screen allows you to create and update your EASYGroup™ PSI databases.

- You may either use your Windows® credentials or a SQL **User Name** and **Password** to connect to the database and execute the scripts.

- The **Server Name** will be pre-filled with the server name of the environment that the Wizard is running on. Change the SQL server database name to the name of the SQL Server instance, which can either be local or remote to the environment the Wizard is running on. Once the information is entered, click the **Connect** button.

- Upon successful connection, the **SQL Server MDF Path** will be pre-filled and used as the storage location for the Primary Data File (.mdf). The Primary Log File (.ldf) is assumed to be in same location as the Primary Data File. If an alternate location for these files is required, please change this by selecting the **Browse** button.

- If this is a new installation, you must start by creating a new database. You can select the **oepps** or the **oepps_** radio button in the **Database Maintenance** section. Click the **Create** button and the utility will begin the database creation process. A simple success or fail message regarding the creation will be displayed in the **Result** section.

- If upgrading to a new version, click/select the database(s) you wish to upgrade then click the **Update** button. The utility will begin the upgrade process. All information regarding the upgrade will be displayed in the **Result** section.

- Click the **View Full Log** button to view a detailed log of the database upgrade/creation.

- Once finished, select **Next**.
Figure 3-13. Database Setup Screen

![Database Setup Screen](image)

**Database Setup**

*Configure the Database(s) on the environment*

- **SQL Authentication:**
  - [ ] Windows
  - [ ] SQL

- **User Name:** [ ]
- **Password:** [ ]

- **Server Name:** [ ]

- **SQL Server MDF Path:** [ ]

- **Database Maintenance:**
  - [ ] oepps
  - [ ] oepps
  - [ ] All

- **Result:**
  - Successfully updated the database. View log for details.
6. In the **Web Processor Setup** screen, enter the **Server Name** and **Port Number** (default is 443) for the EASYGroup™ Environment. Select **Next**.

Figure 3-14. Web Processor Setup Screen
7. In the **User Interface Setup** screen, enter the **Server Name** and **Port Number** for the following:

- **UI Web Site** - This is the location for the PSI User Interface Environment.
- **Web Processor** - This is the location for the Web Processor.

Then enter the **Server Name** for the **Database Location** which is where the PSI Database Environment is located. Select **Next**.

Figure 3-15. User Interface Setup Screen
8. In the **API Setup** screen, enter the **Server Name** and **Port Number** for the following:

- **API Web Site** - This is the location for the API Environment.
- **Web Processor** - This is the location for the Web Processor.

Then enter the **Server Name** for the **Database Location** which is where the PSI Database Environment is located. Select **Next**.

**Note**

If you are using a SQL instance with a slash (e.g. `Server\sql2017`) for the Database Location, supply two slashes instead of one (e.g. `Server\sql\sql2017`). Failure to do so will cause the API to not start properly.

Figure 3-16. API Setup Screen
9. In the **Batch Processor Setup** screen, enter **Server Name** for the **Database Location** which is where the PSI Database Environment is located. Select **Next**.

Figure 3-17. Batch Processor Setup Screen
10. The configuration process will now begin as shown in the **Configuration In Progress** screen.

Figure 3-18. Configuration In Progress Screen
11. Once completed, the **PSI Wizard Completed** screen will appear. The User Interface hypertext will launch the EASYGroup™ PSI application. Please save this link as a web browser favorite for future reference. Select **Finish**.

Figure 3-19. PSI Wizard Completed Screen

3.1.4 Removing an Existing Installation

**Important**

Optum recommends you contact Optum Client Services prior to uninstalling the PSI application to ensure subsequent installations of Optum PPS software are not corrupted.

The steps below detail the removal process:

1. Double-click on the EASYGroup™ PSI installer *(EASYGroupPSI_Vnnnn.nn.exe)*.
2. In the **Modify, Repair, or Remove the Program** screen, select the **Remove** radio button. Select **Next**.

- Selecting **Remove**, will completely remove the previous EASYGroup™ PSI installation.

- Selecting **Modify**, will allow you to select program components to add or remove. When you select the **Next** button, the **Select Features** screen will appear as described above in **Step 5**. Then the Wizard will appear as described above in the **The PSI Wizard** section.

- Selecting **Repair**, will re-install program components. When you select the **Next** button, the InstallShield will begin the process of repairing program components and the Wizard will appear as described above in the **The PSI Wizard** section.

Figure 3-20. Modify, Repair, or Remove the Program Screen
3. Select the **Yes** button to confirm the removal of the EASYGroup™ PSI application.

Figure 3-21. Removal Confirmation Screen

4. The removal process will now begin as shown in the **Removal Status** screen.

Figure 3-22. Removal Status Screen
5. Once complete, the Uninstall Complete screen will appear. Click Finish.

Figure 3-23. Uninstall Complete Screen
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