

FEE BASIS INSTALLATION GUIDE



Patch FB*3.5*158
Health Administration Product Enhancements
(HAPE)
Electronic Data Interchange (EDI)
Purchased Care (PC)
– Electronic Remittance Advice (ERA)
Compliance

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Department of Veterans Affairs
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Revision History

Table i. Revision History

Date	Version	Description	Project Mgr/Technical Writer
11/13/17	2.3	Updated Post-Install instructions	<ul style="list-style-type: none"> • Project Manager Therese Tarleton • Lead Developer/Technical Writer Steve Tjernagel
11/03/2017	2.2	Updated sections 1.2.1, 3.7, 5 per Product Support review and the expected release date	<ul style="list-style-type: none"> • Project Manager Therese Tarleton • Lead Developer/Technical Writer Steve Tjernagel
06/14/2017	2.1	Updated section 4 Pre/Post Installation Overview	<ul style="list-style-type: none"> • Project Manager Therese Tarleton • Lead Developer/Technical Writer Steve Tjernagel
10/13/2016	2.0	VA COR accepted document effective October 13, 2016. Document has been baselined for release.	<ul style="list-style-type: none"> • Project Manager Warren Chave • Lead Developer/Technical Writer Steve Tjernagel
9/27/2016	1.4	<p>Sentence added to Post Install instructions to schedule the task for off-hours.</p> <p>Update software dependencies and description of CARC/RARC Relationship updates.</p>	<ul style="list-style-type: none"> • Project Manager Warren Chave • Lead Developer/Technical Writer Steve Tjernagel
9/13/2016	1.3	Added Tucson to Section 1.3. Modified text in Section 6.	<ul style="list-style-type: none"> • Project Manager Warren Chave • Lead Developer/Technical Writer Steve Tjernagel
9/6/2016	1.2	CR related development added.	<ul style="list-style-type: none"> • Project Manager Warren Chave • Lead Developer/Technical Writer Steve Tjernagel
2/2/2016	1.1	Updated dependencies list	<ul style="list-style-type: none"> • Project Manager

Revision History

			Warren Chave <ul style="list-style-type: none">• Lead Developer/Technical Writer Steve Tjernagel
7/22/2015	1.0	Baselined at Version 1.0 per request from VA PM on 22 July 2015, so that document can be submitted to VA COR for final approval.	<ul style="list-style-type: none">• Project Manager Warren Chave• Lead Developer/Technical Writer Steve Tjernagel

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1 Introduction

1.1 Software Overview

The Electronic Remittance Advice (ERA) Compliance Fee Basis Patch (FB*3.5*158) addresses enhancements to VistA Fee Basis and its compliance to Committee on Operating Rules for Information Exchange (CORE) Level III Electronic Remittance Advice (ERA) / Electronic Funds Transfer (EFT) standards, as part of the Health Administration Product Enhancements (HAPE) Electronic Data Interchange (EDI) Purchased Care (PC) software enhancement project.

1.2 Document Overview

This document provides installation and setup steps for Fee Basis Patch FB*3.5*158. It is intended for VistA administrators at Veterans Affairs (VA) facilities, and it assumes familiarity with installing Kernel Installation and Distribution System (KIDS) file distributions on VistA servers.

1.2.1 Additional Resources

Software and Documentation Retrieval Instructions:

Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from download.vista.med.va.gov. This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Hines: fo-hines.med.va.gov
Salt Lake City: fo-slc.med.va.gov

Documentation can also be found on the VA Software Documentation Library at:
<http://www4.va.gov/vdl/>

Title	File Name
Fee Basis User Manual	FB_3_5_UM_R1217.PDF
Fee Basis Technical Manual /Security Guide	FB_3_5_TM_R1217.PDF
Fee Basis Install Guide	FB_3_5_P158_IG.PDF
Fee Basis Release Notes	FB_3_5_P158_RN.PDF

1.3 Test Site Acknowledgment

The planned test sites for Fee Basis Patch FB*3.5*158 are the following:

- Omaha VA Medical Center
- VA St. Louis Health Care System

2 Software Prerequisites

Fee Basis Patch FB*3.5*158 is a KIDS software release.

2.1 Software Dependencies

The following patches *must* be installed prior to FB*3.5*158:

Software	Version	Required Patches
Fee Basis	3.5	FB*3.5*73
Fee Basis	3.5	FB*3.5*91
Fee Basis	3.5	FB*3.5*127
Fee Basis	3.5	FB*3.5*128
Fee Basis	3.5	FB*3.5*153
Fee Basis	3.5	FB*3.5*154
Fee Basis	3.5	FB*3.5*157

3 Patch Components

3.1 Files and Fields

File Name (Number)	Field Name (Number)	New/Modified/Deleted
FEE BASIS SITE PARAMETERS (#161.4)	NEXT BATCH NUMBER (#10)	Modified
FEE BASIS BATCH (#161.7)	NUMBER (.01)	Modified
ADJUSTMENT REASON (#161.91)	REMITTANCE REMARK (5)	New
	CORE SCENARIO (6)	New
	ADJUSTMENT GROUP (7)	New
REMITTANCE REMARK (#161.93)	ADJUSTMENT GROUP (3)	New
FEE BASIS PAYMENT (#162)	ADJUSTMENT (162.08,1)	New
	PAYMENT METHODOLOGY (162.03,82)	New
	AUTHORIZATION NUMBER (162.03,83)	New
	ATTACHMENT ID (162.03,84)	New
FEE BASIS PHARMACY INVOICE (#162.1)	ADJUSTMENT (#162.15,1)	New
	AUTHORIZATION NUMBER (162.11,40)	New
FEE BASIS INVOICE (#162.5)	ADJUSTMENT (#162.559,1)	New
	AUTHORIZATION NUMBER (162.5,88)	New
	ATTACHMENT ID (162.5,91)	New
	PAYMENT METHODOLOGY (162.5,90)	New
FEE BASIS PAYMENT METHODOLOGY (#163.98)		New

3.2 Forms

N/A

3.3 Mail Groups

Mail Group Name	New/Modified/Deleted
N/A	

3.4 Options

Option Name	Type	New/Modified/Deleted
FBAA BATCH 7YR PURGE	run routine	New
ZTMQUEUEABLE OPTIONS	menu	Modified

3.5 Protocols

N/A

3.6 Security Keys

N/A

3.7 Templates

Template Name	Type	File Name (Number)	New/Modified/Deleted
FBCH EDIT PAYMENT	INPUT	FEE BASIS INVOICE (162.5)	Modified
FBCH ENTER PAYMENT	INPUT	FEE BASIS INVOICE (162.5)	Modified
FBNH EDIT PAYMENT	INPUT	FEE BASIS INVOICE (162.5)	Modified

3.8 Bulletins

There are no bulletins associated with this patch.

3.9 Additional Information

No additional information is included with this installation guide.

3.10 New Service Requests (NSRs)

There are no NSRs associated with this patch.

3.11 Patient Safety Issues (PSIs)

There are no PSIs associated with this patch.

3.12 Estimated Installation Time

The estimated installation time for Fee Basis Patch FB*3.5*158 is less than one minute.

4 Pre/Post Installation Overview

Pre-Installation Instructions:



ALL Payment Batches MUST be Transmitted to Central Fee and have a status of 'Vouchered' prior to installing FB*3.5*158.

This patch may be installed with users on the system although it is recommended that it be installed during non-peak hours to minimize potential disruption to users. This patch should take less than 5 minutes to install.

There are no options to disable for this installation.

The post-installation routine, FBXIP158, will run to compile the modified input templates and remove the option, FB FPPS TRANSMIT, from its parent menu. It will also establish CARC/RARC relationships.

5 Installation Instructions

The installation will install new and modified routines, Data Dictionaries, and Input Templates.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, use the following options. When prompted for the INSTALL enter the patch # (FB*3.5*158):



It is very highly recommended that the installing person perform step 3a here to make a backup copy of the Transport Global and save this as a MailMan message.

- a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as Data Dictionaries (DDs) or templates.
 - b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DDs, templates, etc.).
 - c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.
4. From the Installation Menu, select the Install Package(s) option and choose the patch to install.
 5. When prompted with 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//'
 6. When prompted with 'Want KIDS to INHIBIT LOGONs during the install? NO//' answer NO.
 7. When prompted with 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' answer NO.

When prompted with 'Enter protocols you wish to mark as 'Out Of Order':' press <return>.

8. If prompted with "Delay Install (Minutes): (0 - 60): 0// respond with 0.

6 Post-Installation Instructions

REQUIRED: With this patch the method of batch transmissions will change, transmissions will now go through Central Feed instead Vitria. The Vitria feed must be shut down to prevent duplicate claims from being processed. To shut down the Vitria fee the option, FB FPPS TRANSMIT, needs to be removed from TaskManager three days after the FB*3.5*158 installation; the Vitria feed may be shut down during business hours.

1. In the EVE Systems Manager Menu, when prompted with 'Select Systems Manager Menu Option:' answer Taskman Management.
2. When prompted with 'Select Taskman Management Option:' answer Schedule/Unschedule Options.
3. When prompted with 'Select OPTION to schedule or reschedule:' answer FB FPPS TRANSMIT.
4. When prompted with 'Transmit Invoices to FPPS...OK? Yes//' press <return>.
5. When prompted with 'Enter a COMMAND, or "" followed by the CAPTION of a FIELD to jump to. COMMAND:' answer N.
6. In the 'Option Name:' field, enter @.
7. When prompted with 'Are you sure you want to delete this entire record (Y/N)?' answer Yes.

OPTIONAL: The option, FBAA BATCH 7YR PURGE, can now be scheduled to run monthly in TaskManager. It is recommended that the task be scheduled for off-hours when users are not on the system.

7 Routine Information

The second line of each of these routines now looks like:

```
;;3.5;FEE BASIS;**[Patch List]**;JAN 30, 1995;Build 94
```



NOTE: The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: FBAACIE

Before: B16604968 After: B17356437 **38,61,91,154,158**

Routine Name: FBAACO2

Before: B31897549 After: B33011458 **4,55,61,77,116,122,133,108,
135,139,123,157,158**

Routine Name: FBAACO3

Before: B58658444 After: B57937070 **4,38,55,61,116,122,133,108,
124,143,139,157,154,158**

Routine Name: FBAADOB

Before: B2793564 After: B2800687 **158**

Routine Name: FBAAEPI

Before: B33105165 After: B32470147 **38,61,124,132,123,154,158**

Routine Name: FBAAFR

Before: B2615408 After: B13991294 **61,158**

Routine Name: FBAAMP

Before: B134317556 After: B133720533
**4,21,38,55,61,67,116,108,143,
123,154,158**

Routine Name: FBAAMP1

Before: B12344888 After: B12388857 **4,55,61,77,139,158**

Routine Name: FBAAPET

Before: B51663555 After: B51739856 **4,38,55,61,77,116,122,133,

Routine Information

108,124,132,139,123,154,158**

Routine Name: FBAAPP0

Before: B4309645 After: B4339891 **61,91,158**

Routine Name: FBAAUTL

Before: B26368074 After: B36872113 **101,114,108,124,127,158**

Routine Name: FBAAUTL3

Before: B4132421 After: B4122598 **132,158**

Routine Name: FBAAV0

Before: B56393278 After: B76214254
**3,4,55,89,98,116,108,132,139,

123,158**

Routine Name: FBAAV01

Before: B27989531 After: B48459341 **89,98,108,123,158**

Routine Name: FBAAV1

Before: B29697333 After: B29696707 **10,36,39,98,158**

Routine Name: FBAAV2

Before: B17032694 After: B39413585 **3,89,98,116,108,123,158**

Routine Name: FBAAV3

Before: B3409907 After: B4896340 **3,89,116,132,158**

Routine Name: FBAAV4

Before: B39089780 After: B39332795
13,34,37,70,146,127,153,158

Routine Name: FBAAV5

Before: B101588501 After: B139989645
3,55,89,98,116,108,139,123,158

Routine Name: FBAAV8

Before: B119931377 After: B120330474 **123,158**

Routine Name: FBAAVR5

Before: B40211184 After: B40211366 **132,158**

Routine Name: FBBPG7Y
 Before: n/a After: B8669207 **158**

Routine Name: FBCHEAP
 Before: B21240885 After: B21016855 **38,55,61,77,154,158**

Routine Name: FBCHFR
 Before: B2637264 After: B8623931 **61,158**

Routine Name: FBCHPET
 Before: B44036498 After: B43033601 **4,38,61,77,116,108,124,132,
 123,154,158**

Routine Name: FBNHEP1
 Before: B9319871 After: B9136492 **12,61,158**

Routine Name: FBRXFR
 Before: B2618713 After: B9233192 **61,158**

Routine Name: FBSVBR
 Before: B72554273 After: B79485755 **131,132,158**

Routine Name: FBSVVA
 Before: B19365869 After: B22383786 **131,132,158**

Routine Name: FBUTL1
 Before: B14646555 After: B19606435 **61,158**

Routine Name: FBUTL2
 Before: B53713039 After: B70356259 **61,73,158**

Routine Name: FBUTL4
 Before: B23579110 After: B26671787 **61,158**

Routine Name: FBUTL4A
 Before: n/a After: B30641813 **61,158**

Routine Name: FBX2P158
 Before: n/a After: B176094799 **158**

Routine Information

Routine Name: FBXIP158

Before: n/a After: B8013846 **158**

8 Back-out and Roll-back Procedures

In the event that a site determines, for whatever reason, that they need to uninstall the HAPE EDI PC – ERA Compliance patch (FB*3.5*158) and return their system to the way it was before this patch was installed, please follow these instructions. For the purpose of this discussion, the back-out procedure will include the actual software that needs to be removed. This would include both VistA routines and VistA input templates. The roll-back procedure will include a discussion of data dictionaries that are created by this patch.

It is recommended that sites log a Remedy ticket if it is a nationally released patch; otherwise, the site should contact the product development team directly for specific solutions to their unique problems.

8.1 Back-out Procedure

There are 2 build components that need to be uninstalled here: existing Fee Basis routines and existing Fee Basis Input Templates. The existing Fee Basis routines may be restored from the backup MailMan PackMan message that should have been created in step 3.a. in section 5, Installation Instructions (“Backup a Transport Global”). There are three input templates that need to be restored to the previous version. They are listed in section 3.7 of this document in the Templates section. They are named [FBCH EDIT PAYMENT], [FBCH ENTER PAYMENT], and [FBNH EDIT PAYMENT]. It is not standard practice to proactively backup input templates before patch installation. Therefore, in order to restore these input templates to the pre-patch FB*3.5*158 state, a new patch will be required to be sent to the target site and installed. Please contact Product Support in this case for further instructions. Product Support will work closely with the site and with the VistA Fee Basis development team.

8.2 Roll-back Procedure

The following data dictionaries will need to be restored to the pre FB*3.5*158 versions:

Required: Due to the introduction of new X-References and supporting code to manage them, these DDs must be restored.

FEE BASIS PAYMENT (#162)
FEE BASIS PHARMACY INVOICE (#162.1)
FEE BASIS INVOICE (#162.5)
ADJUSTMENT REASON (#161.91)
REMITTANCE REMARK (#161.93)

Optional: *One field in each file was expanded to accommodate larger input values. There should be no significant impact to system performance if these changes remain.*

FEE BASIS SITE PARAMETERS (#161.4)
FEE BASIS BATCH (#161.7)