

**Health Administration Product Enhancements (HAPE  
Electronic Data Interchange (EDI)  
Medical Care Collection Fund (MCCF) Enhancements**

**Eligibility Benefits and Claims Status Data Content and  
Infrastructure**

**RELEASE NOTES/Installation Guide/Rollback Plan**

**IB\*2\*528**



**Department of Veterans Affairs**

**March 2016**

**Version 2.0**

**Office of Information and Technology (OI&T)**

# Table of Contents

|          |   |           |
|----------|---|-----------|
| <b>1</b> | <b>Introduction.....</b>  | <b>3</b>  |
| 1.1      | Documentation Retrieval.....  | 8         |
| <b>2</b> | <b>Patch Description and Installation Instructions.....</b>                     | <b>9</b>  |
| 2.1      | Patch Description .....   | 9         |
| 2.2      | Pre/Post Installation Overview.....   | 19        |
| 2.3      | Installation Instructions .....   | 19        |
| <b>3</b> | <b>Backout and Rollback Procedures.....</b>                                     | <b>27</b> |
| 3.1      | Overview of Backout and Rollback Procedures .....                               | 27        |
| 3.2      | Backout Procedure .....   | 27        |
| 3.3      | Rollback Procedure .....  | 27        |
| <b>4</b> | <b>Enhancements .....</b>   | <b>28</b> |
| 4.1      | Technical Modifications.....  | 28        |
| 4.1.1    | SSVI - Data Source/Location.....  | 28        |
| 4.1.2    | Eligibility Benefits and Claims Screens .....                                   | 28        |
| 4.1.3    | Security Key Updates .....  | 29        |
| 4.1.4    | Eligibility Benefits and Claims Patient Policy Information Screen – Comments .. | 29        |
| 4.1.5    | Reports .....   | 30        |
| 4.2      | Issue Resolutions.....  | 31        |
| 4.2.1    | New Service Requests (NSRs).....  | 31        |
| 4.2.2    | Remedy Tickets .....  | 31        |

# 1 Introduction

This patch implements changes to VistA's Integrated Billing (IB), Insurance Company, and Patient Insurance File modules are requested by the Veterans Health Administration (VHA) Chief Business Office (CBO) eBusiness Solutions Department to comply with the legislative changes mandated by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

The IB application is a character-based system using VA FileMan as its database manager and Cache/M (TRM approved, <http://trm.oit.va.gov/StandardPage.asp?tid=6402>) as the programming language. This software application is part of the VistA suite of applications, which includes additional clinical and financial applications. There are no Graphical User Interfaces (GUIs).

\*\*\*Note:

The newly added software application System Sharing Verified Insurance (SSVI) Parameter in the eIV Site Parameters is set to OFF during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be set to OFF so as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

IB SSVI mail group:

During the install a new mail group "IB SSVI" will be installed within the VistA database and the installer will be prompted to "Enter the Coordinator for Mail Group IB SSVI:". The IB SSVI mail group will need the name of a person that will be responsible (COORDINATOR) for maintaining the membership of the IB SSVI mail group. Mail messages will be sent to the IB SSVI mail group for identifying SSVI issues. The coordinator name is the appropriate CPAC insurance verification manager for the specific region. If you do not know the name of the CPAC insurance verification manager please contact the rapid response mail group at: [vhaeinsurancerapidresponse@va.gov](mailto:vhaeinsurancerapidresponse@va.gov)

\*\*\*Note:

The newly added software application Consistency Checker source code that uses the options Patient Insurance Info View/Edit (PI)--> Verify Coverage (VC) is now disabled ('commented out') so as to not use the "Consistency Checker" source code to verify coverage. This feature will be modified within future IB projects with instructions on how to use this newly added Consistency Checker feature in conjunction with the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

\*\*\*Note:

The host file "MCCF\_FY14\_HPID\_EIV\_1\_0.KID" contains two patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) that are bundled together into this host file. The two patches are NOT DEPENDENT on each other. After loading the distribution "MCCF\_FY14\_HPID\_EIV\_1\_0\_V20.KID" and installing the distribution "MCCF FY14 HPID EIV 1.0", the installation of BOTH patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) will be installed together AUTOMATICALLY.

\*\*\*Note:

When installing patch IB\*2.0\*528 answer "YES" at the following prompt:

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// YES

In general, the sites may have a background process that is jobbed off at non-peak hours to rebuild the Menu Trees. It is recommended that the sites rebuild the Menu Trees (after the patch is installed and during non-peak hours).

\*\*\*Note:

There are several data reports that when printing/displaying/exporting the data it is recommended to use the 132 or 254 columns to display/print/export. The users will receive a warning message in such a case. It is recommended to have the user's terminal emulation setting for the 'auto-wrap' feature set to 'on'. This will allow the user to view text on the next line when the user is entering/editing comment text fields that extend past the end of the line.

System Sharing Verified Insurance (SSVI):

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will utilize IB Patient Insurance data stored in VA VistA databases residing on approximately 134 VA VistA servers located at 129 VA Medical Centers. There are approximately 750 current users of the IB Patient Insurance application within the VA VistA databases.

Updates to the Patient Insurance data will be shared between VA VistA sites both locally and nationally where the patient has been seen. Only those sites that choose to turn on this option will receive the updated Insurance information.

Note: A new user, AUTOUPDATE,IBEIV, will be created in the NEW PERSON File (#200) during installation. When a patient's insurance is updated at a receiving site, this user name will be the generic name showing that the insurance was last updated or verified by the SSVI process.

The actual transmission of insurance information to other subscribers shall be done in a batch processing fashion. This will be executed by a background job that shall be tasked once a day.

The background job will search for patients who have had the flag to transmit the patient's information set via user indication.

When the Background job runs, it will take the latest "snapshot" of the patient's insurance information (all Active policies & plans, along with all Medicare (M) plans).

After a user updates a patient Insurance record a trigger is initiated that will at the end of the day create a global file containing the updated patient Insurance. Those messages will only be sent to those sites where that patient had visits.

A "consistency checker" to ensure all required sub-fields under the Insurance Type multiple field (multiple field # .3121) in the Patient (#2) file are complete before sending the information to other facilities. A parameter, in the form of a VistA option, will be created to allow each VA site to enable or disable this feature.

A user report can be run for sending and receiving patient insurance information at a site.

#### SSVI - Data Source/Location(s):

The updated Insurance information will reside in the site's existing VistA database where the patient has been seen and optionally transferred to those subscribing VA sites via Remote Query. Those subscribing sites will receive then store the updated information within their VA VistA database until processed.

Three files have been created. IB INSURANCE INCONSISTENT ELEMENTS contains the fields or categories to be checked for inconsistencies following an editing session of the insurance edit option information. IB INSURANCE INCONSISTENT DATA is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI PIN/HL7 PIVOT FILE is a storage area for all the remote query transaction information.

The project will allow the processing/sending of updated patient insurance information via Remote Query messaging. The user will set a flag to have the option of transmitting any updated patient insurance information.

#### Eligibility Benefits and Claims (Screens):

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will create enhancements to the VA VistA system utilizing the IB Version 2.0 software application.

Enhancements will include the creation/modifications of existing Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side comparison of the Insurance Verification Processor buffer information against the patient's Subscriber information found in sub-file (#2.312)Insurance Type File of the Patient File (#2).
2. A newly created Annual Benefits screen will allow the user to View/Edit/Save the patient annual benefits found within file (#355.4) Annual Benefits File.
3. A newly created Coverage Limitations screen will allow the user to View/Edit/Save the patient coverage limitations data found within file (#355.32) Plan Coverage Limitations File.
4. Standardization of certain insurance subscriber display field names from "Insured (Person)" or "Patient" to "Subscriber".

### Security Key Updates:

Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as appropriate.
2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.
3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN INSURANCE CO EDIT option.

Eligibility Benefits and Claims (Patient Policy Information screen - Comments):

Enhancements made to the patient policy comments displayed in the Patient Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the Patient Policy Information screen include:

- a. Retrieval of comment data from the new COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18).
- b. Display of comments in Comment -- Patient Policy region.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient Policy Information screen include:

- a. Provides the capability for the user to enter up to 245 characters of comments
- b. Provides the capability for the user to edit previously entered comments entered on the same day
- c. The user-entered comments, the date/time that the comment was entered/edited, and the user ID (DUZ) gets stored in the respective fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):

COMMENT DATE/TIME (2.342,.01)

LAST EDITED BY (2.342,.02)

COMMENT (2.342,.03)

- d. Due to the authorized usage of the existing COMMENT PATIENT POLICY field (2.312, 1.08) by other applications (ICRs), the old comment field and the new comment multiple are to be populated until the IA subscribers have made the necessary changes to their applications to reference the new fields at the 2.312, 1.18 multiple. To that end the following DD definitions were made:
  - a. Trigger cross-reference was defined to the COMMENT field (2.342, .03) that will populate the COMMENT PATIENT POLICY field (2.312, 1.08) when data is entered/edited at the COMMENT field (2.342, .03).
  - b. Mumps cross-reference was defined to the COMMENT PATIENT POLICY field (2.312, 1.08) that will populate the fields at the COMMENT SUBSCRIBER POLICY multiple only when both the old and the new comment field is different.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

### Reports:

Several new reports will be added to the IB menus and existing reports will be updated.

1. A new report will be created to capture Group Plans without annual benefits for a requested year.
2. An audit report will be created to monitor changes to four IB insurance-related files.
3. A new report will be created to capture outgoing and incoming HL7 messages between VistA and the Financial Services Center (FSC).

4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will be added to the eIV Payer Link Report. (The "HPID/OEID" field was added in IB\*2.0\*521.)
5. A new submenu will be created to display all insurance-related reports under one menu.
6. IB reports will be enhanced to enable output to Excel spreadsheets.

## 1.1 Documentation Retrieval

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](http://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 Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

|                |  |
|----------------|--|
| Albany         | <a href="http://fo-albany.med.va.gov">fo-albany.med.va.gov</a> |
| Hines          | <a href="http://fo-hines.med.va.gov">fo-hines.med.va.gov</a>   |
| Salt Lake City | <a href="http://fo-slc.med.va.gov">fo-slc.med.va.gov</a>       |

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

The documentation will be in the form of Adobe Acrobat files.

| File Description   | File Name          | FTP Mode |
|--|--------------------|----------|
| Integrated Billing User Manual   | IB_2_0_UM.PDF      | (binary) |
| Integrated Billing Technical Manual/<br>Security Guide                     | IB_2_0_TM.PDF      | (binary) |
| Integrated Billing Release Notes   | IB_2_0_P528_RN.PDF | (binary) |
| Electronic Insurance Verification (eIV)<br>Technical Manual/Security Guide | IB_2_0_EIV_TM.PDF  | (binary) |
| Electronic Insurance Verification (eIV) User Manual                        | IB_2_0_EIV_UG.PDF  | (binary) |



## 2 Patch Description and Installation Instructions

### 2.1 Patch Description

```
=====
Run Date: MAR 28, 2016                               Designation: IB*2*528 TEST v21
Package : INTEGRATED BILLING                         Priority   : MANDATORY
Version : 2                                           Status    : UNDER DEVELOPMENT
=====
```

Associated patches: (v)IB\*2\*516 <=< must be installed BEFORE `IB\*2\*528`

Subject: MCCF ENHANCEMENTS PROJECT - EIV

Category: ROUTINE  
          INPUT TEMPLATE  
          OTHER  
          ENHANCEMENT

Description:

=====

This patch implements changes to VistA's Integrated Billing (IB), Insurance Company, and Patient Insurance File modules are requested by the Veterans Health Administration (VHA) Chief Business Office (CBO) eBusiness Solutions Department to comply with the legislative changes mandated by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

The IB application is a character-based system using VA FileMan as its database manager and Cache/M (TRM approved, <http://trm.oit.va.gov/StandardPage.asp?tid=6402>) as the programming language. This software application is part of the VistA suite of applications, which includes additional clinical and financial applications. There are no Graphical User Interfaces (GUIs).

\*\*\*Note:

The newly added software application System Sharing Verified Insurance (SSVI) Parameter in the eIV Site Parameters is set to OFF during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be left OFF so as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

IB SSVI mail group:

During the install a new mail group "IB SSVI" will be installed within the VistA database and the installer will be prompted to "Enter the Coordinator for Mail Group IB SSVI:". The IB SSVI mail group will need the name of a person that will be responsible (COORDINATOR) for maintaining the membership of the IB SSVI mail group. Mail messages will be sent to the IB SSVI mail group for identifying SSVI issues. The coordinator name is the appropriate CPAC insurance verification manager for the specific region. If you do not know the name of the CPAC

insurance verification manager please contact the rapid response mail group at: [vhaeinsurancerapidresponse@va.gov](mailto:vhaeinsurancerapidresponse@va.gov)

\*\*\*Note:

The newly added software application Consistency Checker source code that uses the options Patient Insurance Info View/Edit (PI)--> Verify Coverage (VC) is now disabled ('commented out') so as to not use the "Consistency Checker" source code to verify coverage. This feature will be modified within future IB projects with instructions on how to use this newly added Consistency Checker feature in conjunction with the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

\*\*\*Note:

The host file "MCCF\_FY14\_HP̄ID\_EIV\_1\_0.KID" contain two patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) that are bundled together into this host file. The two patches are NOT DEPENDENT on each other. After loading the distribution "MCCF\_FY14\_HP̄ID\_EIV\_1\_0.KID" and installing the distribution "MCCF\_FY14\_HP̄ID\_EIV\_1.0", the installation of BOTH patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) will be installed together AUTOMATICALLY.

\*\*\*Note:

When installing patch IB\*2.0\*528 answer "YES" at the following prompt: Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// YES In general, the sites may have a background process that is jobbed off at non-peak hours to Rebuild the Menu Trees. It is recommended that the sites rebuild the Menu Trees (after the patch is installed and during non-peak hours).

\*\*\*Note:

There are several data reports that when printing/displaying/exporting the data it is recommended to use the 132 or 254 columns to display/print/export. The users will receive a warning message in such a case. It is recommended to have the users terminal emulation setting for the 'auto-wrap' feature set to 'on'. This will allow the user to view text on the next line when the user is entering/editing comment text fields that extend past the end of the line.

System Sharing Verified Insurance (SSVI):

-----  
The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will utilize IB Patient Insurance data stored in VA VistA databases residing on approximately 134 VA VistA servers located at 129 VA Medical Centers. There are approximately 750 current users of the IB Patient Insurance application within the VA VistA databases.

Updates to the Patient Insurance data will be shared between VA VistA sites both locally and nationally where the patient has been seen. Only those sites that choose to turn on this option will receive the updated Insurance information.

Note: A new user, AUTOUPDATE,IBEIV, will be created in the NEW PERSON File (#200) during installation. When a patient's insurance is updated at a receiving site, this user name will be the generic name showing that the

insurance was last updated or verified by the SSVI process.

The actual transmission of insurance information to other subscribers shall be done in a batch processing fashion. This will be executed by a background job that shall be tasked once a day.

The background job will search for patients who have had the flag to transmit the patient's information set via user indication.

When the Background job runs, it will take the latest "snapshot" of the patient's insurance information (all Active policies & plans, along with all Medicare (M) plans).

After a user updates a patient Insurance record a trigger is initiated that will at the end of the day create a global file containing the updated patient Insurance. Those messages will only be sent to those sites where that patient had visits.

A "consistency checker" to ensure all required sub-fields under the Insurance Type multiple field (multiple field # .3121) in the Patient (#2) file are complete before sending the information to other facilities. A parameter, in the form of a Vista option, will be created to allow each VA site to enable or disable this feature.

A user report can be run for sending and receiving patient insurance information at a site.

#### SSVI - Data Source/Location(s):

-----  
The updated Insurance information will reside in the site's existing Vista database where the patient has been seen and optionally transferred to those subscribing VA sites via Remote Query. Those subscribing sites will receive then store the updated information within their VA Vista database until processed.

Three files have been created. IB INSURANCE CONSISTENCY ELEMENTS(#366.2) contains the fields or categories to be checked for inconsistencies following an editing session of the insurance edit option information. IB INSURANCE INCONSISTENT DATA(#366.1) is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI PIN/HL7 PIVOT(#366) is a storage area for all the remote query transaction information.

The project will allow the processing/sending of updated patient insurance information via Remote Query messaging. The user will set a flag to have the option of transmitting any updated patient insurance information.

#### Eligibility Benefits and Claims (Screens):

-----  
The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will create enhancements to the VA Vista system utilizing the IB Version 2.0 software application.

Enhancements will include the creation/modifications of existing Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side comparison of the Insurance Verification Processor buffer information against the patient's Subscriber information found in either the Patient File(#2) or the Income Person File (#408.13) depending on what the user selects at the "Patient Relationship to Subscriber" prompt.
2. A newly created Annual Benefits screen will allow the user to View/Edit/Save the patient annual benefits found within file (#355.4) Annual Benefits File.
3. A newly created Coverage Limitations screen will allow the user to View/Edit/Save the patient coverage limitations data found within file (#355.32) Plan Coverage Limitations File.
4. Standardization of certain insurance subscriber display field names from "Insured (Person)" or "Patient" to "Subscriber".

Security Key Updates:

-----  
 Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as appropriate.
2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.
3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN INSURANCE CO EDIT option.

Eligibility Benefits and Claims (Patient Policy Information screen - Comments):

-----  
 Enhancements made to the patient policy comments displayed in the Patient Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the Patient Policy Information screen include:

- a. Retrieval of comment data from the new COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18).
- b. Display of comments in Comment -- Patient Policy region.

Affected Options:

-----  
 Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]  
 Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]  
 View Patient Insurance [IBCN VIEW PATIENT INSURANCE]  
 Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient Policy Information screen include:

- a. Provides the capability for the user to enter up to 245 characters of comments
- b. Provides the capability for the user to edit previously entered comments entered on the same day
- c. The user-entered comments, the date/time that the comment was entered/edited, and the user ID (DUZ) gets stored in the respective fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):  
COMMENT DATE/TIME (2.342,.01)  
LAST EDITED BY (2.342,.02)  
COMMENT (2.342,.03)
- d. Due to the authorized usage of the existing COMMENT PATIENT POLICY field (2.312, 1.08) by other applications (ICRs), the old comment field and the new comment multiple are to be populated until the IA subscribers have made the necessary changes to their applications to reference the new fields at the 2.312, 1.18 multiple. To that end the following DD definitions were made:
  - a. Trigger cross-reference was defined to the COMMENT field (2.342, .03) that will populate the COMMENT PATIENT POLICY field (2.312, 1.08) when data is entered/edited at the COMMENT field (2.342, .03).
  - b. Mumps cross-reference was defined to the COMMENT PATIENT POLICY field (2.312, 1.08) that will populate the fields at the COMMENT SUBSCRIBER POLICY multiple only when both the old and the new comment field is different.

Affected Options:

-----  
Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]  
Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]  
View Patient Insurance [IBCN VIEW PATIENT INSURANCE]  
Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Reports:

-----  
Several new reports will be added to the IB menus and existing reports will be updated.

1. A new report will be created to capture Group Plans without annual benefits for a requested year.
2. An audit report will be created to monitor changes to four IB insurance-related files.
3. A new report will be created to capture outgoing and incoming HL7 messages between Vista and the Financial Services Center (FSC).
4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will be added to the eIV Payer Link Report. (The "HPID/OEID" field was added in IB\*2.0\*521.)
5. A new submenu will be created to display all insurance-related reports under one menu.
6. IB reports will be enhanced to enable output to Excel spreadsheets.

Patch Components

=====

Files & Fields Associated:

| File Name (#)                              | Field Name (#)                                  | New/Modified/Deleted |
|--|---|----------------------|
| -----                                      | -----   | -----                |
| PATIENT FILE (#2)                          | INSURANCE TYPE (sub-file) (#2.312)              |                      |
|  | COMMENT-PATIENT POLICY (1.08)                   | Modified             |
|  | COMMENT - SUBSCRIBER POLICY (sub-file) (#2.342) | New                  |
| INSURANCE COMPANY (#36)                    | NAME (#.01)                                     | Modified             |
|  | INACTIVE (#.05)                                 |                      |
|  | STREET ADDRESS [LINE 1] (#.111)                 | Modified             |
|  | STREET ADDRESS [LINE 2] (#.112)                 | Modified             |
|  | REIMBURSE? (#1)                                 | Modified             |
|  | PAYER (#3.1)                                    | Modified             |
| IB SITE PARAMETERS (#350.9)                | IBCN SSVI DISABLE/ENABLE (#100)                 | New                  |
|  | IBCN SSVI LAST INS DATE XFER (#101)             | New                  |
|  | IBCN CURRENT PIVOT ENTRY (#102)                 | New                  |
|  | IBCN PIVOT FILE DAYS TO RETAIN (#103)           | New                  |
| TYPE OF PLAN (#355.1)                      | NAME (#.01)                                     | Modified             |
|  | ABBREVIATION (#.02)                             | Modified             |
| GROUP INSURANCE PLAN (#355.3)              | PLAN STANDARD FTF (#.16)                        | Modified             |
|  | PLAN STANDARD FTF VALUE (#.17)                  | Modified             |
|  | GROUP NAME (#2.01)                              | Modified             |
|  | GROUP NUMBER (#2.02)                            | Modified             |
| INSURANCE VERIFICATION PROCESSOR (#355.33) | SUBSCRIBER PHONE (#62.09)                       | New                  |
| IB SSVI PIN/HL7 PIVOT (#366)               |   | New                  |
| IB INSURANCE INCONSISTENT DATA (#366.1)    |   | New                  |
| IB INSURANCE CONSISTENCY ELEMENTS (#366.2) |   | New                  |

Forms Associated:

| Form Name<br>----- | File #<br>----- | New/Modified/Deleted<br>----- |
|--------------------|-----------------|-------------------------------|
| N/A                |                 |                               |

Mail Groups Associated:

| Mail Group Name<br>----- | New/Modified/Deleted<br>----- |
|--------------------------|-------------------------------|
| IB SSVI                  | New                           |

Options Associated:

| Option Name<br>-----          | Type<br>----- | New/Modified/Deleted<br>----- |
|-------------------------------|---------------|-------------------------------|
| IBCN INSURANCE MGMT MENU      | menu          | Modified                      |
| IBCN INS RPTS                 | menu          | New                           |
| IBCN GRP PLAN FILES RPT       | run routine   | New                           |
| IBCN INTERFACILITY INS UPDATE | run routine   | New                           |
| IBCN USER EDIT RPT            | run routine   | New                           |
| IBCN ID DUP INSURANCE ENTRIES | run routine   | Modified                      |
| IBCN LIST INACTIVE INS W/PAT  | run routine   | Modified                      |
| IBCN LIST NEW NOT VER         | run routine   | Modified                      |
| IBCN LIST PLANS BY INS CO     | run routine   | Modified                      |
| IBCN NO COVERAGE VERIFIED     | run routine   | Modified                      |
| IBCN OUTPUT INS BUFF ACTIVITY | run routine   | Modified                      |
| IBCN OUTPUT INS BUFF EMPLOYEE | run routine   | Modified                      |
| IBCN POL W/NO EFF DATE REPORT | run routine   | Modified                      |
| IBCN PT W/WO INSURANCE REPORT | run routine   | Modified                      |
| IBCNE EIV UPDATE REPORT       | run routine   | Modified                      |
| IBCNE HL7 RESPONSE REPORT     | run routine   | New                           |
| IBCNE IIV PAYER LINK REPORT   | run routine   | Modified                      |
| IBCNE IIV PAYER REPORT        | run routine   | Modified                      |
| IBCNE IIV RESPONSE REPORT     | run routine   | Modified                      |
| IBCNE IIV STATISTICAL REPORT  | run routine   | Modified                      |
| IBCNE POTENTIAL NEW INS FOUND | menu          | Modified                      |
| IBCNE IIV MENU                | menu          | Modified                      |
| IBJD INTAKE INS               | run routine   | Modified                      |
| IBJD INTAKE POL NOT VER       | run routine   | Modified                      |
| IB INPATIENT VET REPORT       | run routine   | Modified                      |
| IB OUTPATIENT VET REPORT      | run routine   | Modified                      |
| IB OUTPUT INPTS WITHOUT INS   | run routine   | Modified                      |
| IB OUTPUT OPTS WITHOUT INS    | run routine   | Modified                      |
| IB OUTPUT PRE-REG SOURCE REPT | run routine   | Modified                      |
| IB OUTPUT TREND REPORT        | run routine   | Modified                      |
| IBCEM PATIENTS W/O MEDICARE   | run routine   | Modified                      |

Protocols Associated:

| Protocol Name<br>-----          | New/Modified/Deleted<br>----- |
|---------------------------------|-------------------------------|
| IBCNB LIST SCREEN MENU          | Modified                      |
| IBCNB LIST TRICARE/CHAMPVA VIEW | New                           |

Security Keys Associated:



Security Key Name

-----  
 IBCNE IIV AUTOMATCH

Templates Associated:

Template Name

| Type                                   | File Name (#)                                 | New/Modified/Deleted |
|--|---|----------------------|
| -----                                  | -----   | -----                |
| IB SSVI PIVOT<br>Print                 | IB SSVI PIN/HL7 PIVOT (#366)                  | New                  |
| IB SSVI PIVOT B<br>Print               | IB SSVI PIN/HL7 PIVOT (#366)                  | New                  |
| IB SSVI PIVOT<br>Sort                  | IB SSVI PIN/HL7 PIVOT (#366)                  | New                  |
| IB SSVI PIVOT B<br>Sort                | IB SSVI PIN/HL7 PIVOT (#366)                  | New                  |
| IB SSVI ENABLE/DISABLE<br>Input        | IB SITE PARAMETERS (#350.9)                   | New                  |
| IBCNE GENERAL PARAMETER EDIT<br>Input  | IB SITE PARAMETERS (#350.9)                   | Modified             |
| IBCN PATIENT INSURANCE<br>Input        | PATIENT (#2)                                  | Modified             |
| IBCNBC CV IP EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCNBC CV OP EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCNBC CV DN EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCNBC CV MH EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCNBC CV LT EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCNBC CV PH EDIT<br>Input             | PLAN COVERAGE LIMITATIONS (#355.32)           | New                  |
| IBCN AB ACCEPT<br>Input                | ANNUAL BENEFITS (#355.4)                      | New                  |
| IBCNB INSURANCE BUFFER PROCESS<br>List | INSURANCE VERIFICATION PROCESSOR<br>(#355.33) | Modified             |

Remote Procedures Associated:

| Remote Procedure Name | New/Modified/Deleted |
|-----------------------|----------------------|
| -----                 | -----                |
| IBCN SSVI ENABLED     | New                  |
| IBCN SSVI SEND        | New                  |

Additional Information:

N/A

New Service Requests (NSRs):

-----  
180833  
20110215  
20120118

Patient Safety Issues (PSIs):

-----  
N/A

Remedy Ticket(s) & Overviews:

-----  
N/A

Test Sites:

-----  
Dayton VAMC - Station 552  
Lebanon VA Medical Center - Station 595  
Martinsburg VA Medical Center - Station 613  
Central Alabama HCS - Station 619

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](http://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 Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
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/>

The documentation will be in the form of Adobe Acrobat files.

| File Description   | File Name          | FTP Mode |
|--|--------------------|----------|
| Integrated Billing User Manual   | IB_2_0_UM.PDF      | (binary) |
| Integrated Billing Technical Manual/<br>Security Guide                     | IB_2_0_TM.PDF      | (binary) |
| Integrated Billing Release Notes   | IB_2_0_P528_RN.PDF | (binary) |
| Electronic Insurance Verification (eIV)<br>Technical Manual/Security Guide | IB_2_0_EIV_TM.PDF  | (binary) |
| Electronic Insurance Verification<br>User Manual                           | IB_2_0_EIV_UG.PDF  | (binary) |

## 2.2 Pre/Post Installation Overview

The post-install routine, IBY528PO, will perform the following:

1. The name of the IBCNE IIV AUTO MATCH key will be changed to IBCNE EIV MAINTENANCE.
2. The IBCNE EIV MAINTENANCE key will be used to lock the following menu options in place of the current IB INSURANCE SUPERVISOR lock:
  - IBCNE PAYER MAINTENANCE MENU
  - IBCNE PAYER EDIT
  - IBCNE PAYER LINK
3. The IBCNE EIV MAINTENANCE key be used to lock the Payer action (PA) action on the IBCN INSURANCE CO EDIT screen.
4. Retrieves all historical comment data stored at (2.312,1.18) and stores to the following new location:
  - COMMENT SUBSCRIBER POLICY multiple (2.312,1.18) :
  - COMMENT DATE/TIME (2.342,.01) = start date/time of the post-install
  - LAST EDITED BY (2.342,.02) = postmaster DUZ
  - COMMENT (2.342,.03) = value stored at 2.312, 1.08

## 2.3 Installation Instructions

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 35 minutes to install depending on the sites current system workload volume during the time of the install depending on the sites current system workload volume during the time of the install.

### 1. OBTAIN PATCHES

Obtain the host file MCCF\_FY14\_HPID\_EIV\_1\_0.KID, which contains the following patches:

```
IB*2.0*528
IB*2.0*525
```

Sites can retrieve Vista software from the following FTP addresses. The preferred method is to FTP the file from:

download.vista.med.va.gov

This will transmit the file from the first available FTP server. Sites may also elect to retrieve software directly from a specific server as follows:

|                |                          |
|----------------|--------------------------|
| Albany         | ftp.fo-albany.med.va.gov |
| Hines          | ftp.fo-hines.med.va.gov  |
| Salt Lake City | ftp.fo-slc.med.va.gov    |

The MCCF\_FY14\_HPID\_EIV\_1\_0.KID host file is located in the anonymous.software directory. Use the American Standard Code for Information Interchange (ASCII) Mode when downloading the file.

## 2. START UP KIDS

-----

Start up the Kernel Installation and Distribution System Menu option [XPD MAIN]:

```
Edits and Distribution ...
Utilities ...
Installation ...
```

Select Kernel Installation & Distribution System Option:  
Installation

```
-----
Load a Distribution
Print Transport Global
Compare Transport Global to Current System
Verify Checksums in Transport Global
Install Package(s)
Restart Install of Package(s)
Unload a Distribution
Backup a Transport Global
```

Select Installation Option:

## 3. LOAD THE TRANSPORT GLOBAL

-----

From the Installation menu, select the Load a Distribution option.

When prompted for "Enter a Host File:", enter the full directory path where you saved the host file MCCF\_FY14\_HPID\_EIV\_1\_0.KID (e.g., SYS\$SYSDEVICE:[ANONYMOUS]MCCF\_FY14\_HPID\_EIV\_1\_0.KID).

When prompted for "OK to continue with Load? YES//", enter "YES."

The following will display:

```
Loading Distribution...

IB*2.0*528
IB*2.0*525
Use INSTALL NAME: MCCF FY14 HPID EIV 1.0 to install this
Distribution.
```

#### 4. RUN OPTIONAL INSTALLATION OPTIONS

-----  
From the Installation menu, you may select to use the following options (when prompted for the INSTALL NAME, enter MCCF FY14 HPID EIV 1.0):

- 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 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, data dictionaries, 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.

#### 5. INSTALL THE PATCH

-----  
This is the step to start the installation of this KIDS patch. This will need to be run for the MCCF FY14 HPID EIV 1.0.

- a. Choose the Install Package(s) option to start the patch install.
- b. When prompted for the "Select INSTALL NAME:", enter MCCF FY14 HPID EIV 1.0.
- c. When prompted for " Enter the Coordinator for Mail Group 'IB SSVI':" enter the name of a person that will be responsible (COORDINATOR) for maintaining the membership of the IB SSVI mail group. \*\*\*See Note for IB SSVI mail group.
- d. When prompted "Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//", enter NO.
- e. When prompted "Want KIDS to INHIBIT LOGONs during the install? NO//", enter NO.
- f. When prompted " Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//", enter NO.
- g. When prompted "Device: HOME//", respond with the correct device but do \* NOT \* queue this install.
- h. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

#### Post-Installation Instructions

-----  
In order to verify the patch post-installation routine was run successfully, please examine the Install File for this patch and check the Mailman message that was created. Report any error messages to Product Support.

#### Routine Information:

=====

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

;;2.0;INTEGRATED BILLING;\*\*[Patch List]\*\*;21-MAR-94;Build 164

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

|                        |                    |                   |  |
|------------------------|--------------------|-------------------|--|
| Routine Name: IBCEMMR  | Before: B48738467  | After: B56465782  | **155,366,528**  |
| Routine Name: IBCN118  | Before: n/a        | After: B9899730   | **528**  |
| Routine Name: IBCNAU   | Before: n/a        | After: B50832462  | **528**  |
| Routine Name: IBCNAU1  | Before: n/a        | After: B17152074  | **528**  |
| Routine Name: IBCNAU2  | Before: n/a        | After: B24403828  | **528**  |
| Routine Name: IBCNAU3  | Before: n/a        | After: B12671484  | **528**  |
| Routine Name: IBCNBAA  | Before: B75234738  | After: B170357032 | **82,184,246,416,506,528**                                     |
| Routine Name: IBCNBAC  | Before: B51549169  | After: B53121470  | **184,497,528**  |
| Routine Name: IBCNBAR  | Before: B44889067  | After: B51423558  | **82,240,345,413,416,497,528**                                 |
| Routine Name: IBCNBCD  | Before: B99276499  | After: B99061672  | **82,251,361,371,416,438,452,<br>497,528**                     |
| Routine Name: IBCNBCD1 | Before: n/a        | After: B94125626  | **528**  |
| Routine Name: IBCNBCD2 | Before: n/a        | After: B204932472 | **528**  |
| Routine Name: IBCNBCD3 | Before: n/a        | After: B116960368 | **528**  |
| Routine Name: IBCNBCD4 | Before: n/a        | After: B43901770  | **528**  |
| Routine Name: IBCNBCD5 | Before: n/a        | After: B137684111 | **528**  |
| Routine Name: IBCNBCD6 | Before: n/a        | After: B134178322 | **528**  |
| Routine Name: IBCNBCD7 | Before: n/a        | After: B7325705   | **528**  |
| Routine Name: IBCNBEE  | Before: B45711543  | After: B50211933  | **82,184,252,251,356,361,371,<br>377,416,438,452,497,528**     |
| Routine Name: IBCNBLA1 | Before: B100917255 | After: B104276372 | **82,133,149,184,252,271,416,<br>438,506,528**                 |
| Routine Name: IBCNBLE  | Before: B108261560 | After: B108286905 | **82,231,184,251,371,416,435,<br>452,497,519,516,528**         |
| Routine Name: IBCNBLL  | Before: B139954762 | After: B144703884 | **82,149,153,183,184,271,345,<br>416,438,435,506,519,528**     |
| Routine Name: IBCNBMI  | Before: B91864404  | After: B96670788  | **82,184,246,251,299,345,361,<br>371,413,416,438,452,497,528** |
| Routine Name: IBCNBOA  | Before: B46681109  | After: B66757822  | **82,305,528**   |
| Routine Name: IBCNBOE  | Before: B81017950  | After: B109925669 | **82,528**   |
| Routine Name: IBCNBOF  | Before: B25012565  | After: B32265412  | **82,528**   |
| Routine Name: IBCNEDE1 |                    |                   |  |

|                        |                   |   |
|------------------------|-------------------|---|
| Before: B44623085      | After: B48194062  | **184,271,416,438,435,467,497,528**           |
| Routine Name: IBCNERP1 |                   |   |
| Before: B79692188      | After: B87784206  | **184,271,416,528**                           |
| Routine Name: IBCNERP2 |                   |   |
| Before: B30801647      | After: B31175764  | **184,271,416,528**                           |
| Routine Name: IBCNERP3 |                   |   |
| Before: B28161597      | After: B77649111  | **184,271,416,528**                           |
| Routine Name: IBCNERP4 |                   |   |
| Before: B61656289      | After: B65437129  | **184,271,300,416,528**                       |
| Routine Name: IBCNERP6 |                   |   |
| Before: B74223457      | After: B98862424  | **184,271,416,528**                           |
| Routine Name: IBCNERP7 |                   |   |
| Before: B26715367      | After: B30436149  | **184,416,528**                               |
| Routine Name: IBCNERP9 |                   |   |
| Before: B103562066     | After: B133982311 | **184,271,416,506,528**                       |
| Routine Name: IBCNERPA |                   |   |
| Before: B6564371       | After: B7366399   | **184,271,345,416,528**                       |
| Routine Name: IBCNERPB |                   |   |
| Before: B47288196      | After: B48231865  | **184,252,271,416,528**                       |
| Routine Name: IBCNERPC |                   |   |
| Before: B46095484      | After: B55318393  | **184,252,271,416,528**                       |
| Routine Name: IBCNERPD |                   |   |
| Before: B67426555      | After: B108873361 | **184,252,416,521,528**                       |
| Routine Name: IBCNERPF |                   |   |
| Before: B16361185      | After: B17142142  | **416,528**                                   |
| Routine Name: IBCNERPG |                   |   |
| Before: B15534927      | After: B15763271  | **416,528**                                   |
| Routine Name: IBCNERPH |                   |   |
| Before: B19008482      | After: B26306975  | **416,528**                                   |
| Routine Name: IBCNERPJ |                   |   |
| Before: n/a            | After: B18323199  | **528**                                       |
| Routine Name: IBCNERPK |                   |   |
| Before: n/a            | After: B9770810   | **528**                                       |
| Routine Name: IBCNERPL |                   |   |
| Before: n/a            | After: B21072359  | **528**                                       |
| Routine Name: IBCNGPF  |                   |   |
| Before: n/a            | After: B21375238  | **528**                                       |
| Routine Name: IBCNGPF1 |                   |   |
| Before: n/a            | After: B16592637  | **528**                                       |
| Routine Name: IBCNGPF2 |                   |   |
| Before: n/a            | After: B19487325  | **528**                                       |
| Routine Name: IBCNGPF3 |                   |   |
| Before: n/a            | After: B8501170   | **528**                                       |
| Routine Name: IBCNICB  |                   |   |
| Before: B106011881     | After: B129151607 | **413,416,528**                               |
| Routine Name: IBCNSM   |                   |   |
| Before: B22946232      | After: B23601352  | **28,46,56,52,82,103,199,276,435,528**        |
| Routine Name: IBCNSM2  |                   |   |
| Before: B21200856      | After: B23942735  | **28,103,139,516,528**                        |
| Routine Name: IBCNSM4  |                   |   |
| Before: B3479873       | After: B4086996   | **56,82,199,276,528**                         |
| Routine Name: IBCNSP   |                   |   |
| Before: B49297563      | After: B79133086  | **6,28,43,52,85,251,363,371,416,497,516,528** |
| Routine Name: IBCNSP0  |                   |   |
| Before: B38008161      | After: B45681848  | **28,43,52,85,93,103,137,229,                 |



251, 363, 371, 399, 438, 458, 497,  
516, 528\*\*

Routine Name: IBCNSP3  
Before: B38854605 After: B85952229 \*\*28, 52, 85, 251, 371, 497, 528\*\*

Routine Name: IBCNVCC  
Before: n/a After: B19887877 \*\*528\*\*

Routine Name: IBCNVCC1  
Before: n/a After: B13802423 \*\*528\*\*

Routine Name: IBCNVPU0  
Before: n/a After: B30762326 \*\*528\*\*

Routine Name: IBCNVRD0  
Before: n/a After: B157582204 \*\*528\*\*

Routine Name: IBCNVRD1  
Before: n/a After: B219042298 \*\*528\*\*

Routine Name: IBCNVRP0  
Before: n/a After: B26970383 \*\*528\*\*

Routine Name: IBCNVRP1  
Before: n/a After: B26005231 \*\*528\*\*

Routine Name: IBCNVRP2  
Before: n/a After: B107004778 \*\*528\*\*

Routine Name: IBCNVUT0  
Before: n/a After: B99101857 \*\*528\*\*

Routine Name: IBCOC  
Before: B1268279 After: B14081123 \*\*528\*\*

Routine Name: IBCOC1  
Before: B1383231 After: B21404907 \*\*528\*\*

Routine Name: IBCOMA  
Before: B21266517 After: B24000522 \*\*103, 528\*\*

Routine Name: IBCOM1  
Before: B34536686 After: B45473488 \*\*103, 516, 528\*\*

Routine Name: IBCOMC  
Before: B25360036 After: B28290447 \*\*103, 528\*\*

Routine Name: IBCOMC1  
Before: B16846008 After: B19172785 \*\*103, 183, 528\*\*

Routine Name: IBCOMC2  
Before: B12669229 After: B15997269 \*\*103, 153, 516, 528\*\*

Routine Name: IBCOMD  
Before: B34794130 After: B38054448 \*\*103, 528\*\*

Routine Name: IBCOMD1  
Before: B21770147 After: B27677991 \*\*103, 528\*\*

Routine Name: IBCOMN  
Before: B11550204 After: B13731474 \*\*103, 528\*\*

Routine Name: IBCOMN1  
Before: B10839800 After: B14298599 \*\*103, 528\*\*

Routine Name: IBCONS1  
Before: B79511698 After: B125225379 \*\*66, 80, 137, 516, 528\*\*

Routine Name: IBCONSC  
Before: B15130560 After: B17158899 \*\*66, 120, 528\*\*

Routine Name: IBCOPP  
Before: B14149734 After: B15985691 \*\*28, 62, 528\*\*

Routine Name: IBCOPP1  
Before: B9186592 After: B10507720 \*\*28, 528\*\*

Routine Name: IBCOPP2  
Before: B20749250 After: B22994194 \*\*28, 62, 93, 516, 528\*\*

Routine Name: IBCOPP3  
Before: B10453963 After: B15474438 \*\*28, 516, 528\*\*

Routine Name: IBCOPR

|                        |                   |                                       |
|------------------------|-------------------|---------------------------------------|
| Before: B34320642      | After: B37055885  | **75,345,528**                        |
| Routine Name: IBCOPR1  |                   |                                       |
| Before: B32793618      | After: B58373479  | **75,345,528**                        |
| Routine Name: IBJDI4   |                   |                                       |
| Before: B27931040      | After: B31792499  | **69,98,100,118,528**                 |
| Routine Name: IBJDI41  |                   |                                       |
| Before: B83815230      | After: B150223354 | **98,100,118,528**                    |
| Routine Name: IBJDI5   |                   |                                       |
| Before: B65839451      | After: B97543922  | **69,98,100,118,123,528**             |
| Routine Name: IBJPI    |                   |                                       |
| Before: B19548396      | After: B21646408  | **184,271,316,416,438,479,506,528**   |
| Routine Name: IBOTR1   |                   |                                       |
| Before: B19679785      | After: B22387130  | **21,42,72,100,118,128,528**          |
| Routine Name: IBOTR3   |                   |                                       |
| Before: B31663645      | After: B51841072  | **42,80,100,118,128,133,447,516,528** |
| Routine Name: IBOUNP1  |                   |                                       |
| Before: B15243221      | After: B17878634  | **249,528**                           |
| Routine Name: IBOUNP3  |                   |                                       |
| Before: B22364020      | After: B37406205  | **249,528**                           |
| Routine Name: IBOUNP4  |                   |                                       |
| Before: B12652607      | After: B13529081  | **528**                               |
| Routine Name: IBOUNP6  |                   |                                       |
| Before: B21711406      | After: B36369758  | **528**                               |
| Routine Name: IBY528PA |                   |                                       |
| Before: n/a            | After: B92379813  | **528**                               |
| Routine Name: IBY528PO |                   |                                       |
| Before: n/a            | After: B23902545  | **528**                               |

## 3 Backout and Rollback Procedures

### 3.1 Overview of Backout and Rollback Procedures

The rollback plan for VistA applications is complex and not able to be a “one size fits all” solution. The general strategy for a VistA rollback is to repair the code with a follow-up patch. The development team recommends that sites log a Remedy ticket if it is a nationally released patch. If not, the site should contact the product support team directly for specific solutions to their unique problems.

### 3.2 Backout Procedure

During the VistA installation procedure of the KIDS build, the installer can back up the modified routines using the ‘Backup a Transport Global’ action. The installer can restore the routines using the MailMan message that was saved prior to the installation of the patch. The backout procedure for global, data dictionary and other VistA components is more complex and will require issuance of a follow-up patch to ensure all components are properly removed. All software components (routines and other items) must be restored to their previous state at the same time and in conjunction with the restoration of the data. This backout process may need to include a database cleanup process.

Please contact the product support team for assistance if the installed patch that needs to be backed out contains anything at all besides routines before trying to backout the patch. If the installed patch that needs to be backed out includes a pre or post install routine, please contact the product support team before attempting the backout.

From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option:

- 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 DD's or templates.

Note: When prompted for the INSTALL enter the patch #.

### 3.3 Rollback Procedure

The rollback procedure for VistA patches is complicated and may require a follow-up patch to fully roll back to the pre-patch state. This is due to the possibility of Data Dictionary updates, Data updates, cross references, and transmissions from VistA to offsite data stores.

Please contact the product development team for assistance if needed.

## 4 Enhancements

### 4.1 Technical Modifications

#### 4.1.1 SSVI - Data Source/Location

The updated insurance information will reside in the site's existing VistA database where the patient has been seen and optionally transferred to those subscribing VA sites via Remote Query. Those subscribing sites will receive then store the updated information within their VA VistA database until processed.

Three files have been created. IB INSURANCE CONSISTENCY ELEMENTS (#366.2) contains the fields or categories to be checked for inconsistencies following an editing session of the insurance edit option information. IB INSURANCE INCONSISTENT DATA (#366.1) is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI PIN/HL7 PIVOT (#366) is a storage area for all the remote query transaction information.

The project will allow the processing/sending of updated patient insurance information via Remote Query messaging. The user will set a flag to have the option of transmitting any updated patient insurance information.

\*\*\*Note:

The newly added software application System Sharing Verified Insurance (SSVI) Parameter in the eIV Site Parameters is set to OFF during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be set to OFF so as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

The newly added software application Consistency Checker source code that uses the options Patient Insurance Info View/Edit (PI)--> Verify Coverage (VC) is now disabled ('commented out') so as to not use the "Consistency Checker" source code to verify coverage. This feature will be modified within future IB projects with instructions on how to use this newly added Consistency Checker feature in conjunction with the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

#### 4.1.2 Eligibility Benefits and Claims Screens

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will create enhancements to the VA VistA system utilizing the IB Version 2.0 software application.

Enhancements will include the creation/modifications of existing Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side comparison of the Insurance Verification Processor buffer information against the patient's Subscriber information found in sub-file (#2.312) Insurance Type File of the Patient File (#2).
2. A newly created Annual Benefits screen will allow the user to View/Edit/Save the patient annual benefits found within file (#355.4) Annual Benefits File.
3. A newly created Coverage Limitations screen will allow the user to View/Edit/Save the patient coverage limitations data found within file (#355.32) Plan Coverage Limitations File.
4. Standardization of certain insurance subscriber display field names from "Insured (Person)" or "Patient" to "Subscriber".

#### **4.1.3 Security Key Updates**

Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as appropriate.
2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.
3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN INSURANCE CO EDIT option.

#### **4.1.4 Eligibility Benefits and Claims Patient Policy Information Screen – Comments**

Enhancements made to the patient policy comments displayed in the Patient Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the Patient Policy Information screen include:

- a. Retrieval of comment data from the new COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18).
- b. Display of comments in Comment -- Patient Policy region.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient Policy Information screen include:

- a. Provides the capability for the user to enter up to 250 characters of comments
- b. Provides the capability for the user to edit previously entered comments entered on the same day
- c. The user-entered comments, the date/time that the comment was entered/edited, and the user ID (DUZ) gets stored in the respective fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):

COMMENT DATE/TIME (2.342,.01)

LAST EDITED BY (2.342,.02)

COMMENT (2.342,.03)

- d. Due to the authorized usage of the existing COMMENT PATIENT POLICY field (2.312, 1.08) by other applications (ICRs), the old comment field and the new comment multiple are to be populated until the IA subscribers have made the necessary changes to their applications to reference the new fields at the 2.312, 1.18 multiple. To that end the following DD definitions were made:
  - a. Trigger cross-reference was defined to the COMMENT field (2.342, .03) that will populate the COMMENT PATIENT POLICY field (2.312, 1.08) when data is entered/edited at the COMMENT field (2.342, .03).
  - b. Mumps cross-reference was defined to the COMMENT PATIENT POLICY field (2.312, 1.08) that will populate the fields at the COMMENT SUBCRIBER POLICY multiple only when both the old and the new comment field is different.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

#### **4.1.5 Reports**

Several new reports will be added to the IB menus and existing reports will be updated.

1. A new report will be created to capture Group Plans without annual benefits for a requested year.
2. An audit report will be created to monitor changes to four IB insurance-related files.
3. A new report will be created to capture outgoing and incoming HL7 messages between VistA and the Financial Services Center (FSC).

4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will be added to the eIV Payer Link Report. (The "HPID/OEID" field was added in IB\*2.0\*521.)
5. A new submenu will be created to display all insurance-related reports under one menu.
6. IB reports will be enhanced to enable output to Excel spreadsheets.

## **4.2 Issue Resolutions**

### **4.2.1 New Service Requests (NSRs)**

This patch is associated with the following NSRs:

- 180833
- 20110215
- 20120118

### **4.2.2 Remedy Tickets**

There are no Remedy Tickets associated with this patch.