Medical Care Collection Fund (MCCF) ePharmacy Compliance Phase 3

Integrated Billing (IB)

Version 1.0

RELEASE NOTES/ Installation Guide/ Rollback Plan

IB*2*550

August 2016

Department of Veterans Affairs

Office of Information and Technology (OI&T)

Table of Contents

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1 Introduction

This patch has enhancements that extend the capabilities of the Veterans
Health Information Systems and Technology Architecture (VistA) electronic
pharmacy (ePharmacy) billing system. Below is a list of all the applications
involved in this project along with their patch number:

```
APPLICATION/VERSION                                     PATCH
---------------------------------------------------------------
OUTPATIENT PHARMACY (OP) V. 7.0                         PSO*7*448
INTEGRATED BILLING (IB) V. 2.0                          IB*2*550
ELECTRONIC CLAIMS MANAGEMENT ENGINE (ECME) V. 1.0       BPS*1*20
CONSOLIDATED MAIL OUTPATIENT PHARMACY (CMOP) V. 2.0     PSX*2*79
PHARMACY DATA MANAGEMENT (PDM) V. 1.0                   PSS*1*192
```

All five of these patches are being released in the Kernel Installation and
Distribution System (KIDS) multi-build distribution.

1.1   Documentation and Distribution

Updated documentation describing the new functionality introduced by this
patch is 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 documentation directly using Secure File 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://www.va.gov/vdl

```
Title                           File Name               Transfer Mode
----------------------------------------------------------------------
Release Notes/Installation Guide    IB_2_0_P550_RN.PDF      Binary
User Manual                         IB_2_0_UM.PDF           Binary
Technical Manual/Security Guide     IB_2_0_TM.PDF           Binary
```

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2 Patch Description and Installation Instructions

2.1 Patch Description

```
VistA Patch Display                                              Page: 1
==============================================================================
Run Date: APR 21, 2016                      Designation: IB*2*550  TEST v16
Package : INTEGRATED BILLING                Priority   : MANDATORY
Version : 2                                 Status     : UNDER DEVELOPMENT
==============================================================================


Associated patches: (v)IB*2*416    <<= must be installed BEFORE `IB*2*550'
                    (v)IB*2*516    <<= must be installed BEFORE `IB*2*550'
                    (v)IB*2*526    <<= must be installed BEFORE `IB*2*550'
                    (v)IB*2*534    <<= must be installed BEFORE `IB*2*550'



Subject:  MCCF ePHARMACY COMPLIANCE PHASE 3

Category:  ROUTINE
           OTHER
           ENHANCEMENT
           DATA DICTIONARY

Description:
===========


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    PHARMACY DATA MANAGEMENT (PDM) V. 1.0                  PSS*1*192

All five of these patches are being released in the Kernel Installation and
Distribution System (KIDS) multi-build distribution.

KIDS multi-build name: BPS PSO IB PSX PSS BUNDLE 9.0
  KIDS Host File name: BPS_1_20_PSO_IB_PSX_PSS.KID


This specific patch contains the following functionality:
----------------------------------------------------------
 1. The Patient Release of Information [IBCNR RELEASE OF INFORMATION]
    option contains actions to add a new ROI and to view/edit an existing
    ROI. These actions were modified to allow the user to enter any date for
    the expiration date as long as it is after the effective date of the ROI.
```

2. The e-Pharmacy Menu [IBCNR E-PHARMACY MENU] contains a new report option of RER ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] without requiring a security key.

3. The new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] will prompt the user for the following:

   Beginning Expiration Date
   Ending Expiration Date
   Status of (A)ctive, (I)nactive, or (B)oth

   The beginning expiration date has a default value of T-180 and the ending expiration date has a default value of T+60.

4. The new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] will display patient name, insurance name, date of death, effective date, expiration date, date added and the drug name. The report is sorted by expiration date in reverse chronological order.

5. The Group Plan Worksheet Report [IBCNR GROUP PLAN WORKSHEET] will display the VA Plan ID instead of the Pharmacy Plan.

6. The option Match Multiple Group Plans [IBCNR GROUP PLAN MATCH] will display the VA Plan ID instead of the Pharmacy Plan.

7. The option Match Group Plan to a Pharmacy [IBCNR PLAN MATCH] will display the VA Plan ID instead of the Pharmacy Plan.

8. IB Billing Determination will use the new ePharmacy Billable fields to assess billable status of the ePharmacy prescription.

9. IB Billing Determination will use the new field called Sensitive Diagnosis Drug to determine drugs used exclusively to treat a sensitive diagnosis and will examine the system to find a Release of Information (ROI) record on file to determine if the drug is billable or not.

10. When the system automatically populates the non-billable reason and the associated free text ROI reason, the system will use "ROI NOT OBTAINED" and free text reason "NO ACTIVE/VALID ROI FOR DRUG OR INSURANCE".

11. The IB back billing processes shall use the same date of service algorithm used in outpatient pharmacy and in ECME. A claim can be back-billed through Claims Tracking and the action to Generate ECME Rx Bills.

12. The IB Billing Event Log shall contain new drug file fields in the finish event for billing events that do not generate a claim because of non-billable determination.

Patch Components:

Files & Fields Associated:

File Name (#)   New/Modified/
  Sub-file Name (#)   Field Name (Number)   Deleted
------------------   ------------------------------   -------------

```
IB NCPDP EVENT LOG (#366.14)                          Modified
   EVENT sub-file (#366.141)                          Modified
                     DRUG ECME BILLABLE (#7.06)       New
                     DRUG ECME BILLABLE TRICARE (#7.07)  New
                     DRUG ECME BILLABLE CHAMPVA (#7.08)  New
                     DRUG SENSITIVE DIAGNOSIS (#7.09)  New
```

Forms Associated:

```
                                                 New/Modified/
Form Name                 File Name (Number)       Deleted
---------                 ------------------     -------------
N/A
```

Mail Groups Associated:

```
                                                 New/Modified/
Mail Group Name                                    Deleted
---------------                                  -------------
N/A
```

Options Associated:

```
                                                 New/Modified/
Option Name               Type                     Deleted
-----------               ----                   -------------
IBCNR E-PHARMACY MENU                            Modified
IBCNR EDIT PAYER          run routine            Delete
IBCNR ROI EXPIRATION      run routine            New
REPORT
```

Protocols Associated:

```
                                                 New/Modified/
Protocol Name                                      Deleted
-------------                                    -------------
N/A
```

Security Keys Associated:

```
                                                 New/Modified/
Security Key Name                                  Deleted
-----------------                                -------------
N/A
```

Templates Associated:

```
                                                 New/Modified/
Template Name     Type     File Name (Number)      Deleted
-------------     ----     ------------------     -------------
IBCNR GROUP PLAN  List     N/A                    Modified
MATCH
IBCNR PLAN MATCH  List     N/A                    Modified
```

Additional Information:
N/A

New Service Requests (NSRs)

20140411 - Medical Care Collection Fund (MCCF) ePharmacy Compliance Phase 3

Patient Safety Issues (PSIs)

N/A

Defect Tracking System Ticket(s) & Overview:

N/A

Test Sites:

VA HEARTLAND - WEST, VISN 15 (589)
LEXINGTON VAMC-LEESTOWN (596)
HUNTER HOLMES MCGUIRE HOSPITAL - RICHMOND (652)
BIRMINGHAM VAMC (521)
CENTRAL ARKANSAS HEALTH CARE SYSTEM - LITTLE ROCK (598)

Documentation Retrieval Instructions

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patch is available.

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    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://www.va.gov/vdl

Title   File Name   Transfer Mode

Release Notes/Installation Guide IB_2_0_P550_RN.PDF   Binary
User Manual   IB_2_0_UM.PDF   Binary
Technical Manual/Security Guide   IB_2_0_TM.PDF   Binary

2.2   Pre/Post Installation Overview

There is a post-install routine associated with this patch named
POST^IBY550PO. The purpose of the post-install routine is to:

  a. Remove the references to the Payer file (365.12) from the ePharmacy PLAN
     file (366.03). Both the data and the field definition are removed.
  b. Remove all E-PHARM payer application data from the Payer file (365.12).
     ePharmacy does not use the Payer file.
  c. Remove the E-PHARM entry from the payer application dictionary file
     (365.13).

The post-install routine is automatically deleted by the system if allowed by
your Kernel site parameters configuration. You may delete this routine if the
installation was successful and it is not automatically deleted by KIDS.

2.3   Installation Instructions

Please see the Installation Instructions associated with patch BPS*1.0*20.

Routine Information:
====================

The second line of each of these routines now looks like:
;;2.0;INTEGRATED BILLING;**[Patch List]**;21-MAR-94;Build 25

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

Routine Name: IBCBB11
    Before: B95727608   After: B96464375   **51,343,363,371,395,392,401,
                                              384,400,436,432,516,550**
Routine Name: IBCNEHLI
    Before: B8196060   After: B7817332   **184,252,251,271,300,416,550**
Routine Name: IBCNRE1
    Before: B14123296   After: Delete
Routine Name: IBCNRE2
    Before: B12782236   After: B12751444   **251,550**
Routine Name: IBCNRHLT
    Before: B14102069   After: B13273530   **251,435,550**
Routine Name: IBCNRHLU
    Before: B7442206   After: B8116443   **251,550**
Routine Name: IBCNRMFE
    Before: B8335815   After: B7262621   **251,276,550**
Routine Name: IBCNRMFK
    Before: B5880062   After: B5869085   **251,550**
Routine Name: IBCNRP
    Before: B23991821   After: B23991702   **251,516,550**
Routine Name: IBCNRPM2
    Before: B20488193   After: B20472874   **251,276,550**
Routine Name: IBCNRRP3

```
    Before: B58110020   After: B58130731  **251,276,516,550**
Routine Name: IBCNRU1
    Before: B36756107   After: B30407184  **251,276,435,550**
Routine Name: IBCNRZCM
    Before:  B3893703   After:  B3870682  **251,550**
Routine Name: IBCNRZP0
    Before:   B925392   After:    Delete
Routine Name: IBCNRZPL
    Before:  B7494348   After:  B6548655  **251,550**
Routine Name: IBCNRZPP
    Before:       n/a   After: B13594389  **550**
Routine Name: IBCNRZRX
    Before: B13620171   After:    Delete
Routine Name: IBNCPBB1
    Before:  B4732084   After:  B4476268  **384,550**
Routine Name: IBNCPDP
    Before:  B5636694   After: B14785713  **223,276,363,383,384,411,435,
                                          452,550**
Routine Name: IBNCPDP1
    Before:B164054794   After:B179115393  **223,276,339,363,383,405,384,
                                          411,434,437,435,455,452,473,
                                          494,534,550**
Routine Name: IBNCPDP2
    Before: B84172572   After: B82759628  **223,276,342,347,363,383,405,
                                          384,411,435,452,526,550**
Routine Name: IBNCPDPU
    Before:B125879968   After:B126640808  **223,276,347,383,405,384,437,
                                          435,452,511,534,550**
Routine Name: IBNCPDR
    Before:  B7723137   After:  B9280847  **384,550**
Routine Name: IBNCPDR1
    Before:  B4262134   After:  B3213258  **384,550**
Routine Name: IBNCPDR2
    Before:  B8736079   After:  B9323055  **384,550**
Routine Name: IBNCPDR4
    Before: B32682440   After: B31809366  **384,550**
Routine Name: IBNCPDRA
    Before:       n/a   After: B35956392  **550**
Routine Name: IBNCPDRB
    Before:       n/a   After: B19609001  **550**
Routine Name: IBNCPEV
    Before:B102192248   After: B98081615  **342,363,383,384,411,435,452,
                                          521,516,550**
Routine Name: IBNCPEV1
    Before: B67774383   After: B78796257  **342,339,363,411,435,452,516,550**
Routine Name: IBNCPLOG
    Before: B83304395   After: B86545576  **342,339,363,383,411,435,452,
                                          534,550**
Routine Name: IBNCPUT1
    Before: B20040520   After: B21678012  **342,363,384,550**
Routine Name: IBTRKR3
    Before: B54376358   After: B54454971  **13,43,121,160,247,275,260,
                                          309,336,312,339,347,405,384,
                                          550**
Routine Name: IBY550PO
    Before:       n/a   After:  B5495891  **550**
```

```
Routine list of preceding patches: 416, 516, 526, 534
```

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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." The general strategy for VistA rollback is to repair the code with a follow-up patch. The development team recommends that sites log a ticket if it is a nationally released patch; otherwise, the site should contact the Enterprise Program Management Office (EPMO) 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 were saved prior to installing 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 restoration of the data. This backout may need to include a database cleanup process.

Please contact the EPMO 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 EPMO 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. When prompted for the INSTALL enter the patch #.

   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 DD's or templates.
```

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.

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4 Enhancements

The following features in VistA, Integrated Billing are affected by this effort:

4.1 System Feature: ROI Expiration Date

The Patient Release of Information [IBCNR RELEASE OF INFORMATION] action allows the user to enter any date for the expiration date. However, the expiration date cannot be earlier than the effective date. There is also a new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] available to users and is sorted by expiration date in reverse chronological order.

4.2 System Feature: TRICARE Copay

The system does not create a TRICARE copay for a prescription if a TRICARE copay already exists.

4.3 System Feature: Display VA Plan ID

Several options display the VA Plan ID instead of the Pharmacy Plan: Group Plan Worksheet Report [IBCNR GROUP PLAN WORKSHEET], Match Multiple Group Plans [IBCNR GROUP PLAN MATCH], and Match Group Plan to a Pharmacy [IBCNR PLAN MATCH].

4.4 System Feature: Billing Determination

IB Billing Determination uses the ePharmacy Billable fields to assess billable status and the Sensitive Diagnosis Drug field to assess sensitive diagnosis instead of using the DEA, Special HDLG field.

4.5 System Feature: Date of Service

The back billing processes uses the same date of service algorithm used in outpatient pharmacy.

4.6 System Feature: Billing Event Log

The IB Billing Event Log contains new drug file fields in the finish event for billing events that do not generate a claim because of non-billable determination.