Department of Veterans Affairs

**Electronic Data Interchange (EDI)
New Standards and Operating Rules
VHA Provider-side Technical Compliance Requirements
VA118-1001-1018**

Health Plan Identifier (HPID) Implementation Compliance

Electronic Claims Management Engine (ECME)

Release Notes/ Installation Guide/ Rollback Plan

BPS*1*18

January 2015

Table of Contents

1 Introduction

The Health Plan Identifier (HPID) project implements a new national standard of having a single identifier to use on electronic transmissions pertaining to health care. All entities that are financially responsible for care are assigned a HPID or Other Entity Identifier (OEID), used for entities that aren't traditional health plans. This new standard increases interoperability by replacing clearinghouse-specific identifiers for health plans.

This patch builds on the Integrated Billing (IB) HPID Build 1 patch (IB*2.0*519) to enable it to include the HPID/OEID for ePharmacy on selected screens and reports.

Below is a list of all the applications involved in this project along with their patch number:

```
  APPLICATION/VERSION                                 PATCH
  --------------------------------------------------------------
  INTEGRATED BILLING (IB) V. 2.0                      IB*2.0*521
  ELECTRONIC CLAIMS MANAGEMENT ENGINE (ECME) V. 1.0   BPS*1.0*18
  ACCOUNTS RECEIVABLE (PRCA) V. 4.5                   PRCA*4.5*302
```

The patches (IB*2.0*521, BPS*1.0*18 and PRCA*4.5*302) are being released in the Kernel Installation and Distribution System (KIDS) multi-build distribution as: BPS IB PRCA HPID BUNDLE 2.0.

1.1   Documentation and Distribution

Updated documentation describing the new functionality introduced by this patch is available using the File Transfer Protocol (FTP).

The preferred method is to FTP the file from ftp://download.vista.med.va.gov/. This transmits 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
<ftp://ftp.fo-albany.med.va.gov>

Hines   ftp.fo-hines.med.va.gov
<ftp://ftp.fo-hines.med.va.gov>

Salt Lake City ftp.fo-slc.med.va.gov
<ftp://ftp.fo-slc.med.va.gov>

The documentation will be in the form of Adobe Acrobat files. Documentation can also be found on the VA Software Documentation Library at: http://www4.va.gov/vdl/

```
File Description                        File Name            FTP Mode
----------------------------------------------------------------------
Release Notes/Installation Guide        bps_1_p18_rn.pdf     Binary
ECME User Manual                        bps_1_um_r0115.pdf   Binary
```

2 Patch Description and Installation Instructions

2.1   Patch Description

```
==============================================================================
Run Date: JAN 15, 2015                      Designation: BPS*1*18
Package : E CLAIMS MGMT ENGINE              Priority   : MANDATORY
Version : 1                                 Status     : RELEASED
==============================================================================

Associated patches: (v)BPS*1*9    <<= must be installed BEFORE `BPS*1*18'
                    (v)BPS*1*15   <<= must be installed BEFORE `BPS*1*18'
                    (u)IB*2*519   <<= must be installed BEFORE `BPS*1*18'

Subject:  HEALTH PLAN IDENTIFIER (HPID) IMPLEMENTATION BUILD 2

Category:  ROUTINE
           DATA DICTIONARY
           ENHANCEMENT

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


The Health Plan Identifier (HPID) project implements a new national standard
of having a single identifier to use on electronic transmissions pertaining
to health care. All entities that are financially responsible for care are
assigned a HPID or Other Entity Identifier (OEID), used for entities that
aren't traditional health plans. This new standard increases interoperability
by replacing clearinghouse-specific identifiers for health plans.

This patch builds on the Integrated Billing (IB) HPID Build 1 patch
(IB*2.0*519) to enable it to include the HPID/OEID for ePharmacy on selected
screens and reports. (The HPID will not replace the use of the Banking
Identification Number (BIN) and/or Processor Control Number (PCN).)

Below is a list of all the applications involved in this project along  with
their patch number:

    APPLICATION/VERSION                                    PATCH
    ----------------------------------------------------------------
    INTEGRATED BILLING (IB) V. 2.0                         IB*2.0*521
    ELECTRONIC CLAIMS MANAGEMENT ENGINE (ECME) V. 1.0      BPS*1.0*18
    ACCOUNTS RECEIVABLE (PRCA) V. 4.5                      PRCA*4.5*302

The patches (IB*2.0*521, BPS*1.0*18 and PRCA*4.5*302) are being released in
the Kernel Installation and Distribution System (KIDS) multi-build
distribution as:  BPS IB PRCA HPID BUNDLE 2.0.

Patch Components
================


Files & Fields Associated:

File Name (Number)            Field Name (Number)       New/Mod/Del
------------------            -------------------       -----------
BPS RESPONSES (#9002313.03)   PAYER ID QUALIFIER (#568)     Mod
```

```
Forms Associated:

Form Name            File #       New/Modified/Deleted
---------            ------       --------------------
N/A

Mail Groups Associated:

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

Options Associated:

Option Name                  Type           New/Modified/Deleted
-----------                  ----------     ------------------------
N/A

Protocols Associated:

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

Security Keys Associated:

Security Key Name
-----------------
N/A

Templates Associated:

Template Name                   Type     File Name (Number) New/Mod/Del
-------------                   ----     ----------------- -----------
N/A

Remote Procedure                       New/Mod/Del
-------------                          -----------
N/A

Additional Information:
N/A

New Service Requests (NSRs):
--------------------------
NSR - Request ID: 20110503 Electronic Data Interchange (EDI) New
      Standards and Operating Rules (Veterans Health Administration)
      VHA Provider-Side TCRs  05/19/2011
      http://vista.med.va.gov/nsrd/ViewITRequest.asp?RequestID=20110503

Patient Safety Issues (PSIs):
----------------------------
N/A
```

```
Remedy Ticket(s) & Overviews:
-----------------------------
N/A

Test Sites:
-----------
White River Junction, VT
Houston, TX
Walla Walla, WA
Tampa, FL
```

2.2   Pre/Post Installation Overview

```
Pre/Post Installation Overview
------------------------------
This patch should take less than 5 minutes to install.

DO NOT QUEUE the installation of this patch.

To avoid disruptions, these patches should be installed during non-peak
hours when there is minimal activity on the system. Avoid times when
Electronic Remittance Advices (ERAs) and (Electronic) Explanations of
Benefits (EOBs) are being received from the Financial Services Center (FSC).
```

2.3   Installation Instructions

```
Installation Instructions
-------------------------

1. OBTAIN PATCHES
   --------------
Obtain the host file BPS_IB_PRCA_HPID_BUNDLE_2_0.KID, which contains the
following patches:

    BPS*1.0*18
    IB*2.0*521
    PRCA*4.5*302

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 BPS_IB_PRCA_HPID_BUNDLE_2_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 TRANSPORT GLOBAL FOR MULTI-BUILD
   ------------------------------------
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 BPS_IB_PRCA_HPID_BUNDLE_2_0.KID (e.g.,
SYS$SYSDEVICE:[ANONYMOUS]BPS_IB_PRCA_HPID_BUNDLE_2_0.KID).

When prompted for "OK to continue with Load? NO//", enter "YES."

The following will display:

  Loading Distribution...

    BPS IB PRCA HPID BUNDLE 2.0
    BPS*1.0*18
    IB*2.0*521
    PRCA*4.5*302

Use INSTALL NAME: BPS IB PRCA HPID BUNDLE 2.0 to install this
distribution.

4. RUN OPTIONAL INSTALLATION OPTIONS FOR MULTI-BUILD
   -------------------------------------------------
From the Installation menu, you may select to use the following options (when
prompted for the INSTALL NAME, enter BPS IB PRCA HPID BUNDLE 2.0):

   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 MULTI-BUILD

   This is the step to start the installation of this KIDS patch. This will
   need to be run for the BPS IB PRCA HPID BUNDLE 2.0.

         a. Choose the Install Package(s) option to start the patch install.
         b. When prompted for the "Select INSTALL NAME:", enter BPS IB PRCA HPID
            BUNDLE 2.0.
         c. When prompted "Want KIDS to Rebuild Menu Trees Upon Completion of
            Install? NO//", enter NO.
         d. When prompted "Want KIDS to INHIBIT LOGONs during the install?
            NO//", enter NO.
         e. When prompted " Want to DISABLE Scheduled Options, Menu Options,
            and Protocols? NO//", enter NO.
         f. When prompted "Device: HOME//", respond with the correct device
            but do * NOT * queue this install.
         g. 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 report any error messages
   to Product Support.

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

   The second line of each of these routines now looks like:
   ;;1.0;E CLAIMS MGMT ENGINE;**[Patch List]**;01-JUN-04;Build 31

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

   Routine Name: BPSRPT9
      Before: B81558879   After:B106079505 **8,18**
   Routine Name: BPSRPT9A
      Before: B82830891   After: B95077796 **8,9,18**
   Routine Name: BPSSCRLG
      Before:B235812243   After:B241284581 **1,5,7,8,10,11,15,18**

   Routine list of preceding patches: 9, 15

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-on patch. The development team recommends 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.

3.2   Backout Procedure

During the VistA Installation Procedure of the KIDS build, the installer hopefully backed up the modified routines by the use of 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-on 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 product development 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 development 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. 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-on 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

The following features in VistA, Electronic Claims Management Engine, are affected by this effort:

4.1   System Feature: ePharmacy Transactions

4.1.1 ePharmacy Transactions - Maintain the Pharmacy Bank Identification Number/Processor Control Number

The HPID/OEID does not replace the pharmacy Bank Identification Number/Processor Control Number (BIN/PCN) identifier in electronic pharmacy transactions.

Note: The BIN/PCN are tied to the entity that will be processing the transaction or where the transaction is to be sent (routing) and are used for effective and efficient pharmacy claim adjudication. Use of BIN/PCN is mandatory in electronic pharmacy transactions.

4.1.2 ePharmacy Transactions - ePharmacy HPID/OEID Data Contained in the NCPDP (National Council for Prescription Drug Program) Response Segment

The software provides the ability for ePharmacy HPID/OEID data to be received and stored in ECME when contained in the NCPDP response segment from the Processor/Payer/PBM (Pharmacy Benefit Management)/ Intermediary/TPA (Third Party Administrator).

4.1.3 ePharmacy Transactions - ePharmacy Software to Recognize the HPID/OEID Data Returned in the NCPDP Response Segment

The ePharmacy software recognizes the HPID/OEID data being returned in the NCPDP Response segments.

4.2   System Feature: Reports/Screens

4.2.1 Reports/Screens - Modify the following ePharmacy Screens/Reports to Include the HPID/OEID

The following ePharmacy screens/reports include the HPID/OEID ID:

- Print Claim Log [BPS PRTCL USRCR CLAIM LOG] (when included in the incoming response)

- ECME Billing Events Report [IB ECME BILLING EVENTS]

- ECME Claims-Response Inquiry Report [BPS RPT CLAIMS RESPONSE] (when included in the incoming response)

- Third Party Joint Inquiry (TPJI), Claim Information [IBJ THIRD PARTY JOINT INQUIRY] (below the ECME Ap No and NPI) (when included in the incoming response)

- TPJI, ECME Rx information [IBJ THIRD PARTY JOINT INQUIRY] (below the ECME Ap No) (when included in the incoming response)

- Coordination of Benefit screens/reports (ECME option ECME Pharmacy COB) include:
    - SEC Potential Secondary Rx Claims Report
    - TRI Potential TRICARE Claims Report