



INCOME VERIFICATION MATCH (IVM)

USER MANUAL

Version 2.0

October 1994

Department of Veterans Affairs
Office of Enterprise Development
Management, Enrollment and Financial Systems (MEFS)

Revision History

Please Note: Effective March, 2001, changes to IVM documentation resulting from released patches will be described in the Revision History section. In lieu of change pages, the complete user manual will be released with the software patches associated with the changes described in this section.

| Revision Date | Description | Related Patch Number(S) | Project Manager (PM) and Author (Auth) (beginning with 1/19/05 entry) |
|----------------------|---|--------------------------------|--|
| 3/20/2001 | IVM Case Inquiry option - Revised Introduction section of to include Co-Pay Exemption Tests | IVM*2.0*17 | Karen Stella |
| 3/20/2001 | Added new option: IVM Financial Query | IVM*2.0*17 | Karen Stella |
| 3/20/2001 | Updated fonts to comply with current documentation standards where applicable | N/A | Karen Stella |
| 3/20/2001 | Added Revision History section | N/A | Karen Stella |
| 3/20/2001 | Moved List Manager mnemonics into a table | N/A | Karen Stella |
| 8/1/2003 | Updated Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/11/03 | Updated Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/12/03 | Updated Revision History section | N/A | Karen Stella |
| 8/12/03 | Updated Orientation section | N/A | Karen Stella |
| 8/12/03 | Replaced "HEC" with "the HEC", where appropriate | N/A | Karen Stella |
| 8/12/03 | Corrected formatting of "VISTA" in text, where appropriate | N/A | Karen Stella |
| 8/12/03 | Updated Introduction section | N/A | Karen Stella |
| 8/12/03 | Updated references to Category C | N/A | Karen Stella |
| 8/12/03 | Updated references to Category A | N/A | Karen Stella |
| 8/12/03 | Updated headings format throughout manual | N/A | Karen Stella |
| 8/12/03 | Removed outdated Preface section | N/A | Karen Stella |
| 8/13/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |
| 8/13/03 | Added new option: IVM Address Updates Pending Review | IVM*2*79 | Karen Stella |
| 9/12/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |
| 9/15/03 | Updated IVM Demographics Upload option | IVM*2*79 | Karen Stella |
| 5/25/04 | Updated new Date of Death functionality in the IVM Upload/ Demographics Upload section. | IVM*2*56 | Tom Hamilton |
| 9/23/04 | Changed all sensitive information to generic information | N/A | Tom Hamilton |

| Revision Date | Description | Related Patch Number(S) | Project Manager (PM) and Author (Auth) (beginning with 1/19/05 entry) |
|----------------------|---|--------------------------------|--|
| 10/29/04 | Added Field #.2917 to table of non-uploadable data elements on Page 5 | N/A | Edna Curtin, Karen Stella |
| 11/15/04 | Changed all sensitive information to conform to the agreed upon convention as set forth in SOP 192-352 Displaying Sensitive Data, dated 9/22/04 | N/A | Tom Hamilton |
| 1/19/05 | Updated Demographics Upload Option | IVM*2*102 | PM: Katherine Harris Auth: Karen Stella |
| 10/27/05 | Added new user option, IVM Address Change Log Report, in the IVM Output Menu section (per discussion with Nancy Rudinger) | IVM*2*108 | PM: Katherine Harris Auth: Karen Stella |
| 10/27/05 | Moved IVM Address Updates Pending Review from IVM Output Menu section to IVM Upload Menu section (per discussion with Nancy Rudinger) | IVM*2*108 | PM: Katherine Harris Auth: Karen Stella |
| 4/10/06 | Updated IVM Address Change Log Report option | IVM*2*106 | PM: Gerry Lowe Auth: Karen Stella |
| 4/13/06 | Updated IVM Address Change Log Report option based on feedback and additional research | IVM*2*106 | PM: Gerry Lowe Auth: Karen Stella |
| 4/25/06 | Additional updates to the IVM Address Change Log Report option | IVM*2*106 | PM: Gerry Lowe Auth: Nancy Rudinger, Karen Stella |
| 8/3/06 | Updated IVM Insurance Upload narrative | IVM*2*111 | PM: Katherine Harris Auth: Tom Hamilton |
| 9/25/06 | Updated Packaging Management section, Insurance Upload narrative | IVM*2*111 | PM: Katherine Harris Auth: Karen Stella |
| 10/2/06 | Updated Packaging Management section | IVM*2*111 | PM: Katherine Harris Auth: Terry Kopp |
| 10/18/2006 | Updated IVM Insurance Upload narrative based on feedback | IVM*2*111 | PM: Katherine Harris Auth: Karen Stella |
| 10/18/2006 | Updated document footers to reflect correct release month and patch number | IVM*2*111 | PM: Katherine Harris Auth: Karen Stella |
| 4/6/07 | Enrollment Vista Changes Release 2 (EVC R2) - Updated Demographics Upload option | IVM*2*115 | PM: Laura Prietula Auth: Karen Stella |
| 4/6/07 | Enrollment Vista Changes Release 2 (EVC R2) - Updated IVM Address Change Log Report option narrative | IVM*2*115 | PM: Laura Prietula Auth: Karen Stella |
| 4/13/07 | Enrollment Vista Changes Release 2 (EVC R2) - Updated IVM Address Change Log Report option Detailed Report Example | IVM*2*115 | PM: Laura Prietula Auth: Karen Stella |
| 6/07/08 | Enrollment Vista Changes Release 2 (EVC R2) - Updated Demographics Upload option | IVM*2*115 | PM: Laura Prietula Auth: Tavia Leonard |

| Revision Date | Description | Related Patch Number(S) | Project Manager (PM) and Author (Auth) (beginning with 1/19/05 entry) |
|----------------------|---|--------------------------------|--|
| 6/27/08 | Enrollment VistA Changes Release 2 (EVC R2) - Updated Demographics Upload option formatting | IVM*2*115 | PM: Laura Prietula Auth: Tavia Leonard |
| 4/7/09 | Enrollment VistA Changes Release 2 (EVC R2) – Deleted IVM - DEMOGRAPHIC UPLOAD for IVMpatient electronic mail notifications example from Appendix A. This bulletin will no longer be generated when VistA receives updates from the ESR system. | IVM*2*140 | PM: Laura Prietula Auth: Tom Hamilton |
| 9/22/09 | ESR 3.1/VOA – Updated IVM Transmission Error Processing Option. Updated IVM UPLOAD INSURANCE screen. | IVM*2*121 | PM: Lynne Case Auth: Tavia Leonard |
| 5/18/10 | Marked as “obsolete” the entire <i>SSN Upload</i> section. This section will be removed for the next patch update. Additional Address fields added to the <i>Demographics Upload</i> section of the <i>IVM Upload Menu</i> . | IVM*2*121 | PM: Brian Morgan Auth: Tom Hamilton |
| 7/5/2011 | Updated new Date of Death functionality in the IVM Upload/ Demographics Upload section. | IVM*2*148 | PM: Jennifer Freese Auth: Jill Headen |
| 7/6/2011 | Page 1, under User/Interactive Functions, 1 st bullet: Updated wording to: “View/verify patient demographic and insurance information.” Page 17, IVM Upload Menu Removed wording: “The crossed through text below is obsolete and will be removed from the next release of this manual.” | IVM*2*148 | PM: Jennifer Freese Auth: Jill Headen |
| 7/24/2012 | IVM*2.0*152 – Permanent Address Verification Changes – ESR 3.8. Added Residence Number Change fields to list of fields in the Demographic Upload | IVM*2*152 | PM: Glenda Miller Auth: Linda Desmond/ Tom Hamilton |
| 1/8/2013 | IVM*2.0*152 – Permanent Address Verification Changes – ESR 3.8. Updated footer date to December 2012 release date. | IVM*2*152 | PM: Glenda Miller Auth: Tom Hamilton |

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Introduction

Background

Public Law 101-508 permits the Department of Veterans Affairs (VA) to verify income data with the Internal Revenue Service (IRS) and Social Security Administration (SSA) for veterans receiving VA health care services whose eligibility for medical care is based on income. The Income Verification Match (IVM) process for Veterans Health Administration (VHA) medical facilities is centralized and performed at the HEC in Atlanta, Ga.

Functionality

IVM Version 2.0 provides all of the functionality required to complete the eligibility verification process. This primarily involves electronically receiving the revised VA Form 10-10F from the HEC and automatically filing the updated test in the **VISTA** Means Test module.

User Interactive Functions

- View/verify patient demographic and insurance information.
- Upload verified data
- View billing/collection and Means Test activity
- Configure, monitor, and purge the IVM system

Non-interactive Functions

- Exchange of data, on an ad-hoc basis, between your facility and the HEC via electronic transmissions
- Scheduled transmission to the HEC of all Means Tests meeting IVM criteria via the Nightly Background Job, and IVM-related billing and collections activity

Integration

IVM V. 2.0 provides functionality that impacts Registration, Medical Care Cost Recovery (MCCR), and IRM staff at your facility. It is highly integrated with the following packages.

Patient Information Management System (PIMS)

- PIMS demographic, Means Test, and income information is sent to the HEC
- Means Test and demographic information verified by the HEC is uploaded into PIMS files

Integrated Billing (IB)

- Patient insurance information is transmitted to the HEC
- Means Test charges are created in IB for patients who become MT Copay Required when a verified Means Test from IVM is transmitted to the facility
- Insurance information identified by IVM is uploaded into IB files
- IB provides billing and collections information, for billings resulting from IVM activity, that is transmitted back to the HEC

Health Level 7 (HL7)

Provides the foundation for all communications between your facility and the HEC

Related Manuals

| | |
|---|--|
| | |
| IVM V. 2.0 Technical Manual (includes Security section) | Technical and security information regarding operation and maintenance of the IVM system |
| IVM V. 2.0 Release Notes | New features and functions of the V. 2.0 software |
| IVM V. 2.0 Installation Guide | Information necessary to install the software |

Package Management

Means Tests that meet the IVM criteria and billing/collections information for IVM-related bills are transmitted automatically to the HEC each evening during the nightly background job.

Means Tests that have been verified by the HEC and transmitted back to the facility are automatically filed into *VISTA* upon receipt.

There are two parameters included with the IVM software. These parameters, which can be edited through the IVM Parameter Enter/Edit option (by those who hold the IVM SYS security key), control whether notification messages are sent to the IVM MESSAGES mail group when demographic information is received from the HEC. If no entry is made, the default action is to generate the messages. This option may be used to inactivate the messages.

Per VHA Directive 2004-038, Modifications to VHA Class I Software, the third line of routines that are restricted or prohibited from being locally modified should be modified (as they are patched or enhanced) to read as follows:

“Per VHA Directive 2004-038, this routine should not be modified.”

Using the Software

IVM Upload Menu

Demographics Upload



The Demographics Upload option is locked with the IVM UPLOAD security key.

Introduction

As part of the Income Verification Match process, patient demographic information is returned to VAMCs. During the course of verifying a Means Test, HEC Contact Representatives may determine that certain patient demographic and eligibility information has changed. The HEC may electronically transmit these changes to the VAMCs in the ORU~Z05 Demographic Data Transmission message. These demographic elements are classified as either **UPLOADABLE** (elements can be automatically uploaded to the PATIENT File [#2] using this option) or **NON-UPLOADABLE** (data or patient record is corrupt; these elements cannot be automatically uploaded to the PATIENT File [#2] using this option).

UPLOADABLE demographic elements will be compared to the patient demographic elements that are currently on file in **VISTA** and displayed to the user via the Demographics Upload [IVM UPLOAD DEM] option. This option allows the user to review these elements and choose to either upload or delete them.

NON-UPLOADABLE demographic elements will be compared to the patient demographic elements that are currently on file in **VISTA** and displayed to the user via the Demographics Upload option. This demographic information is provided to the VAMC for informational purposes only. This option allows the user to review these elements, but not automatically load them into **VISTA**. These **NON-UPLOADABLE** elements must be entered manually via the Load/Edit Patient Data or Register a Patient options in the PIMS Registration Menu. Be sure to verify that the data is accurate before entering it manually.

IVM Upload Menu

Demographics Upload

Introduction, continued

Data in the following PATIENT File (#2) fields can be uploaded when using this option.

| Field Name | Field Number |
|--------------------------------|---------------------|
| ADDRESS CHANGE DT/TM | (#.118) |
| ADDRESS CHANGE SOURCE | (#.119) |
| CITY | (#.114) |
| CITY (VA) | (#.2916) |
| CLAIM FOLDER LOCATION | (#.314) |
| CLAIM FOLDER NUMBER | (#.313) |
| COUNTY | (#.117) |
| COUNTRY | (#.1173) |
| DATE MEDICAID LAST ASKED? | (#.382) |
| DATE OF BIRTH | (#.03) |
| * DATE OF DEATH | (#.351) |
| * DATE OF DEATH LAST UPDATED | (#.354) |
| DATE RULED INCOMPETENT (VA) | (#.291) |
| ELIGIBILITY STATUS | (#.3611) |
| ELIGIBILITY STATUS DATE | (#.3612) |
| ELIGIBILITY VERIF. METHOD | (#.3615) |
| ELIGIBLE FOR MEDICAID? | (#.381) |
| GUARDIAN (VA) | (#.2912) |
| INSTITUTION (VA) | (#.2911) |
| PHONE (VA) | (#.2919) |
| PHONE NUMBER [RESIDENCE] | (#.131) |
| POSTAL CODE | (#.1172) |
| PRIMARY ELIGIBILITY CODE | (#.361) |
| PROVINCE | (#.1171) |
| RATED INCOMPETENT? | (#.293) |
| RELATIONSHIP (VA) | (#.2913) |
| RESIDENCE NUMBER CHANGE DT/TM | (#.1321) |
| RESIDENCE NUMBER CHANGE SITE | (#.1323) |
| RESIDENCE NUMBER CHANGE SOURCE | (#.1322) |
| SEX | (#.02) |
| * SOURCE OF NOTIFICATION | (#.353) |
| STATE | (#.115) |
| STATE (VA) | (#.115) |
| STREET ADDRESS [LINE 1] | (#.111) |
| STREET ADDRESS [LINE 1] (VA) | (#.2914) |
| STREET ADDRESS [LINE 2] | (#.112) |
| STREET ADDRESS [LINE 2] (VA) | (#.2915) |
| STREET ADDRESS [LINE 3] | (#.113) |
| ZIP (VA) | (#.2918) |
| ZIP+4 | (#.1112) |

*Date of Death-related fields.

IVM Upload Menu

Demographics Upload

Introduction, continued

Uploading Address Information

You can choose to accept or reject updated address information with this option if

- The Bad Address Indicator (BAI) is NULL
AND
- The patient has an active Pharmacy prescription
AND
- Your VAMC receives an update for a patient's permanent mailing address

You can upload/delete complete addresses only (must take action on all address fields). If you attempt to upload/delete an individual address field, a message is displayed indicating that if you choose to proceed, all address fields will be uploaded/deleted. For uploading purposes, the following are considered address fields: COUNTRY, STREET ADDRESS [LINE 1], STREET ADDRESS [LINE 2], CITY, PROVINCE, STATE, ZIP+4, COUNTY, POSTAL CODE and PHONE NUMBER [RESIDENCE].

If the incoming address (IVM Field Value) is older than the address currently already file at the VAMC (DHCP Field Value), a warning is displayed, and the software asks you to verify that you want to update the complete address.

If the patient you selected has an active prescription on file, and you are attempting to upload the complete address, a warning is displayed, and the software asks you to verify that you want to update the complete address.

If the IVM address fields (IVM Field Value) you are uploading do not include a phone number, but the *VISTA* address fields on file (DHCP Field Value) include a phone number, the software displays the patient's name and phone number and asks if you want to delete the phone number.

IVM Upload Menu

Demographics Upload

Introduction, continued

Entering/Uploading Date of Death Information

During data entry, the date of death must be entered in one of the following formats:

- Year only
- Month and year
- Month, day, and year

If you choose not to upload date of death information from the HEC, a mail message will be sent to the DGEN ELIGIBILITY ALERT mail group to notify them that they must contact the HEC with a reason for not accepting the data. When you upload data in one of the date of death fields (Date of Death, Source of Notification, and Date of Death Last Updated), the data in all three of these fields will upload.

The date of death sent from HEC will be ignored by VistA when the date of death value from HEC (in the ORU~Z05) matches the date of death value at the VAMC. Date of death will automatically be deleted from the PATIENT File (#2) when the ORU~Z05 from the HEC contains a date of death deletion.

When any message qualifies for an automatic upload, the process will search the Demographics Upload option for any date of death entries, and take the following action on all patient records

- If the record contains date of death-related field data only, the data will be deleted and the record will be removed from the Demographics Upload option.
- If the record contains a combination of date of death-related field data plus any other field data, only the date of death-related field data will be removed, and the record will remain in the Demographics Upload option.
- If the date of death field is empty (null) and the data received from HEC contains both a date of death and Source of Notification equal to "Death Certificate on File," then the data is uploaded to VistA.
- If the date of death field is already populated in VistA and date of death data is received from HEC, the data from HEC is ignored and VistA will not create an entry in the IVM Demographic Upload tool.

List Manager

This option uses the ListManager utility which provides a series of screens that display lists of patients whose demographics information has changed, and can be viewed, uploaded, or rejected using the actions at the bottom of the screens.

Data that is on file at the VAMC is displayed under the column heading “DHCP Field Value”. Data coming from the HEC in an ORU~Z05 message is displayed under the column heading “IVM Field Value”.

In addition to the generic List Manager actions described in Appendix B of this manual, the following actions are also available when using this option:

| Short Name | Full Name | Brief Description |
|--|---------------------------|---|
| From the IVM Demographic Screen | | |
| DU | Display Uploadable | <ul style="list-style-type: none"> Displays uploadable data for the selected patient on the Uploadable Demographics screen Provides List Manager actions to upload or delete demographic data |
| VN | View Non Uploadable | <ul style="list-style-type: none"> Displays non-uploadable data for the selected patient on the Uploadable Demographics screen Provides List Manager action to delete demographic data |
| EH | Extended Help | <ul style="list-style-type: none"> Takes you to the extended help screen Provides definitions of uploadable vs. non-uploadable data |
| From the Uploadable Demographics Screen | | |
| UF | Upload Demographic Fields | Uploads data elements to the PATIENT File(#2) |
| DF | Delete Demographic Fields | Deletes data elements from the list on the Uploadable Demographics Screen |
| From the Non-Uploadable Demographics Screen | | |
| DF | Delete Demographic Fields | Deletes data elements from the list on the Non-Uploadable Demographics Screen |

IVM Upload Menu

Demographics Upload

Example

The IVM Demographic Upload screen displays a list of patients whose demographics information has changed and indicates whether there is uploadable/non-uploadable information. This example assumes that you are going to upload address changes for IVMPATIENT,FOUR, Patient #4.

| IVM DEMOGRAPHIC UPLOAD | | Sep 15, 2003@14:05:09 | Page: 1 of | |
|---------------------------------|------------------|-----------------------|-------------------------|-----------------------------|
| Patient Demographic Information | | | | |
| | Patient Name | Patient SSN | Uploadable Demographics | Non-uploadable Demographics |
| 1 | IVMPATIENT,ONE | 000-84-6304 | YES | NO |
| 2 | IVMPATIENT,TWO | 000-84-3405 | YES | NO |
| 3 | IVMPATIENT,THREE | 000-47-0316 | YES | NO |
| 4 | IVMPATIENT,FOUR | 000-56-0893 | YES | NO |

Enter ?? for more actions

| | | |
|-----------------------|------------------------|------------------|
| DU Display Uploadable | VN View Non Uploadable | EH Extended Help |
|-----------------------|------------------------|------------------|

Select Action: Quit// **DU=4** Display Uploadable

IVM Upload Menu

Demographics Upload

Example, continued

When address information is available for uploading, the Uploadable Demographics screen displays the current address information (DHCP Field Value) and the incoming data (IVM Field Value).

Uploadable Demographics Sep 15, 2003@15:21:47 Page: 1 of 1
 Patient: IVMPATIENT,FOUR (0893) Uploadable Demographic Fields

| | DHCP Field Name | DHCP Field Value | IVM Field Value |
|---|-------------------------|----------------------|-----------------------------|
| 1 | STREET ADDRESS [LINE 1] | 11 EXIT NOT ALLOWED | 502 SQA CHANGE |
| 2 | STREET ADDRESS [LINE 2] | (* NONE ON FILE *) | 8/27 AVENUE B |
| 3 | CITY | Mytown1 | Mytown1 |
| 4 | STATE | Mystatel | Mystatel |
| 5 | ZIP+4 | 99999 | 99999 |
| 6 | COUNTY | Mycounty | Mycounty |
| 7 | ADDRESS CHANGE SOURCE | VAMC | HEC |
| 8 | ADDRESS CHANGE DT/TM | AUG 29, 2003@16:53:0 | AUG 27, 2003@08:46:0 |

Enter ?? for more actions

UF Upload Demographic Fields DF Delete Demographic Fields
 Select Action: Quit// **UF** Upload Demographic Fields
 Select FIELD(s): (1-7): **1**
 You have selected to update an address field.
 You will be required to upload the entire address.
 Do you wish to proceed with this action? NO// **YES**
 *** WARNING: This patient has ACTIVE PRESCRIPTIONS on file.
 Are you sure that you want to update the complete address? NO// **YES**
 Filing address fields... completed.
 The patient's address has been updated and the phone number
 remains on file.
 Patient Name: IVMPATIENT,FOUR (0893)
 Phone Number [Residence]: 555-1212
 Is it okay to delete the patient's Phone Number [Residence]? NO// **<ENTER>** No
 Patient's Phone Number [Residence] has not been deleted.

IVM Upload Menu

Insurance Upload



The Insurance Upload option is locked with the IVM UPLOAD security key.

Introduction

When patient insurance information is transmitted from the HEC to the VAMC(s), it is filed in the IVM PATIENT File (#301.5) and automatically moved to the INSURANCE BUFFER File (#355.33), without user intervention, unless an exception occurs.

This option lists only those patient insurance records received from the HEC that could not be automatically moved to the INSURANCE BUFFER File (#355.33) and require further action.

Once action has been taken on the data, a confirmation message is automatically transmitted to the HEC. The message includes the decision made at the site and, if the information was rejected, the reason the data was not uploaded.

If **VISTA** or IVM records show a date of death on a patient, it is indicated on the screen by an asterisk. If that patient is selected, a message is displayed indicating that a date of death has been reported either by the HEC or **VISTA**.

IVM Upload Menu

Insurance Upload

Example

Example 1 – Transfer IVM Insurance Policy to Insurance Module

| Patient Name | SSN | Ins | Insurance Carrier | Subscriber ID |
|---------------------|-------------|-----|---------------------------|---------------|
| 1 IVMPATIENT,FIVE | 000-56-0730 | NO | ABC INSURANCE COMPANY | DFS9732 |
| 2 IVMPATIENT,SIX | 000-98-8887 | NO | XYZ INSURANCE COMPANY | 029876587 |
| 3 IVMPATIENT,SEVEN | 000-77-3882 | YES | 123 INSURANCE COMPANY | 2838B34H |
| 4 *IVMPATIENT,EIGHT | 000-26-9525 | YES | INSURANCE INSURANCE COMPA | 021670999 |
| 5 IVMPATIENT,NINE | 000-45-6992 | YES | BARRY BARRY INSURANCE | 00123ER45 |
| 6 IVMPATIENT,TEN | 000-01-0111 | NO | ABC INSURANCE COMPANY | DFS7865 |

Enter ?? for more actions

DE Display Entry EH Extended Help
 Select Action: Quit// **de=4** Display Entry

'Date of Death' reported for this patient in DHCP as JUN 23, 1994.

Press RETURN to continue: <RET>

```

*****
INSURANCE POLICIES CURRENTLY ON FILE
*****
Insurance Co.      Subscriber ID      Group      Holder Effective Expires
=====
No Insurance Information

*****
INSURANCE POLICY RECEIVED FROM the HEC
*****
Company: INSURANCE      COMPANY      Effective Date: FEB 3, 1992
Phone #: (999)555-1212      Expiration Date: OCT 10, 1994
Address:      Subscriber ID: 000670999
123 Anywhere St.      Policy Holder: SELF
<insurance addr line #2>
<insurance addr line #3>
Mytown, Mystate 99999      Group Name: UMBRELLA GRP
Group Number: 102
Pre-Cert. Req?: NO

Name of Insured: IVMPATIENT, EIGHT      Plan Type: HEALTH MAINTENANCE ORGAN

Press RETURN to continue or '^' to return to display screen: <RET>

```

IVM Upload Menu

Insurance Upload

Example, cont.

```
Select one of the following:

    1          Transfer IVM Insurance Policy to Insurance Module
    2          Purge IVM Insurance Policy
    3          Return to Display Screen

Select Action: ??

Entering '1' at this prompt will allow the user to upload the Insurance Policy
that was received from the HEC.  Entering '2' at this prompt will allow
the user to delete the Insurance Policy that was received from the HEC
Entering '3' or '^' will abort this action.

    Select one of the following:

        1          Transfer IVM Insurance Policy to Insurance Module
        2          Purge IVM Insurance Policy
        3          Return to Display Screen

Select Action: 1  Transfer IVM Insurance Policy to Insurance Module

Transferring HEC's insurance policy to insurance module completed.
Press RETURN to continue: <RET>
```

IVM Upload Menu

Insurance Upload

Example, cont.

Example 2 - Purge Insurance Policy

```

IVM INSURANCE UPLOAD          Jul 28, 1994 16:24:50          Page:    1 of    1
the HEC has identified insurance for the following patients:
  (*) - Indicates Death Reported Act
  Patient Name      SSN          Ins  Insurance Carrier      Subscriber ID
1  IVMPATIENT,FIVE  000-56-0730  NO   ABC INSURANCE COMPANY   DFS9732
2  IVMPATIENT,SIX   000-98-8887  NO   XYZ INSURANCE COMPANY   029876587
3  IVMPATIENT,SEVEN 000-77-3882  YES  123 INSURANCE COMPANY   2838B34H
4  *IVMPATIENT,EIGHT 000-26-9525  YES  INSURANCE INSURANCE COMPA 021670999
5  IVMPATIENT,NINE  000-45-6992  YES  BARRY BARRY INSURANCE    00123ER45
6  IVMPATIENT,TEN   000-01-0111  NO   ABC INSURANCE COMPANY   DFS7865

Enter ?? for more actions
DE Display Entry          EH Extended Help
Select Action: Quit// de=4  Display Entry

'Date of Death' reported for this patient in DHCP as JUN 23, 1994.
Press RETURN to continue: <RET>
    
```

```

                INSURANCE POLICIES CURRENTLY ON FILE
*****
Insurance Co.      Subscriber ID      Group      Holder Effective Expires
=====
No Insurance Information

                INSURANCE POLICY RECEIVED FROM the HEC
*****
Company: INSURANCE          COMPANY      Effective Date: FEB 3, 1992
Phone #: (999)555-1212      Expiration Date: OCT 10, 1994
Address:                  Subscriber ID: 000670999
    123 Anywhere St.      Policy Holder: SELF
    <insurance addr line #2>
    <insurance addr line #3>
    Mytown, Mystate 99999      Group Name: UMBRELLA GRP
                                Group Number: 102
                                Pre-Cert. Req?: NO

Name of Insured: IVMPATIENT, EIGHT      Plan Type: HEALTH MAINTENANCE ORGAN

Press RETURN to continue or '^' to return to display screen: <RET>
    
```

IVM Upload Menu

Insurance Upload

Example, cont.

```

Select one of the following:

      1          Transfer IVM Insurance Policy to Insurance Module
      2          Purge IVM Insurance Policy
      3          Return to Display Screen

Select Action: 2 Purge IVM Insurance Policy

```

```

The 'Purge IVM Insurance Policy' action has been selected.

This action will cause the insurance information which has been
received from the HEC to be deleted from the system!

Please select a reason for purging the IVM insurance information.
Select reason for purging: ??

CHOOSE FROM:
  1      ALREADY HAVE INSURANCE POLICY
  2      DATA APPEARS TO BE INCORRECT
  3      INSURANCE COMPANY CLOSED
  4      POLICY PLAN TYPE IS HMO
  5      POLICY PLAN TYPE IS PPO
  6      POLICY COVERAGE EXPIRED
  7      POLICY BENEFITS FULLY USED
  8      BENEFITS NOT AVAILABLE
  9      COVERAGE FOR SPOUSE ONLY

Select reason for purging: 1      ALREADY HAVE INSURANCE POLICY

Are you sure that you want to purge IVM insurance data? NO// y YES

Purging the 'Insurance Policy' received from IVM...  completed.

Press RETURN to continue: <RET>

```

IVM Upload Menu

Insurance Upload

Example, cont.

| IVM INSURANCE UPLOAD | | Jul 28, 1994 16:24:50 | | Page: 1 of 1 | |
|--|-------------------|-----------------------|------------------|---------------------------|---------------|
| the HEC has identified insurance for the following patients: | | | | | |
| (*) - Indicates Death Reported Act | | | | | |
| | Patient Name | SSN | Ins | Insurance Carrier | Subscriber ID |
| 1 | IVMPATIENT,FIVE | 000-56-0730 | NO | ABC INSURANCE COMPANY | DFS9732 |
| 2 | IVMPATIENT,SIX | 000-98-8887 | NO | XYZ INSURANCE COMPANY | 029876587 |
| 3 | IVMPATIENT,SEVEN | 000-77-3882 | YES | 123 INSURANCE COMPANY | 2838B34H |
| 4 | *IVMPATIENT,EIGHT | 000-26-9525 | YES | INSURANCE INSURANCE COMPA | 021670999 |
| 5 | IVMPATIENT,NINE | 000-45-6992 | YES | BARRY BARRY INSURANCE | 00123ER45 |
| Enter ?? for more actions | | | | | |
| DE Display Entry | | | EH Extended Help | | |
| Select Action: Quit// | | | | | |

IVM Upload Menu

Please Note: **SSN Upload** is no longer used in VistA. The Enrollment System Redesign HEC Legacy Replacement application now does it automatically.

IVM Upload Menu

IVM Address Updates Pending Review

Introduction

This option generates the IVM Automatic Address Upload Report. The only prompt asks for a device. The report displays the addresses that will be automatically uploaded to the VAMC if no other action is taken within 14 days from the date they are received at the VAMC. The output includes the following information:

- Name of the report
- Date the report was generated
- Page number
- Date the update will be automatically uploaded to the VAMC if no other action is taken
- Date the update was received at the VAMC
- Patient's SSN
- Patient's name

This report might take some time to process, depending on the number of updates received at your facility. You might want to queue the report to run during non-peak work hours.

Example

| IVM AUTOMATIC ADDRESS UPLOAD RPT | | JUN 11, 2003 | Page: 1 |
|----------------------------------|---------------|--------------|----------------------|
| ===== | | | |
| Auto-Upload Date | Date Received | SSN | Patient Name |
| ----- | ----- | ----- | ----- |
| Jun 23, 2003 | Jun 09, 2003 | 000168014 | IVMpatient,seventeen |
| Jun 24, 2003 | Jun 10, 2003 | 000168014 | IVMpatient,seventeen |
| <<END OF REPORT>> | | | |

IVM Output Menu

Billing Transmission Report

Introduction

This option generates a report of all IVM-related billing and collection activity that has been transmitted to the HEC. Information for each third party claim or Means Test charge is listed along with the date that the last transmission was sent to IVM. The report will also indicate whether any further transmissions will be sent to IVM.



Data from IB files are included in this report.

Example

This report will list all billing activity which has been, or will be, transmitted to the IVM Center. This includes Means Test charges for patients who have changed categories due to IVM-verified Means Tests, as well as claims to insurance companies for patients who have insurance policies identified by the IVM Center.

Please note that this output requires 132 columns. This report may not run very quickly so you might choose to queue the report to a printer.

DEVICE: HOME// <RET> Decnet RIGHT MARGIN: 80// 132

```
Run Date: 08/11/94 8:19 am
Page: 1
IVM BILLING TRANSMISSION REPORT
```

| Patient Name | SSN | Ref # | Bill Clsf | Bill Type | Bill From | - To | Date Generated | Amt Billed | Amt Coll | Date Last Trans | Last Tran |
|----------------|-------------|---------|-----------|-----------|-----------|----------|----------------|------------|----------|-----------------|-----------|
| IVMpatient,sev | 000-03-3211 | 5003082 | O | INS CLAIM | 05/13/94 | 05/13/94 | 06/29/94 | 356.00 | 0.00 | 07/14/94 | NO |
| IVMpatient,eig | 000-89-4444 | 5003086 | O | COPAYMENT | 12/10/93 | 12/10/93 | | 36.00 | --N/A-- | Not Sent | NO |
| IVMpatient,nin | 000-70-9989 | 5003080 | I | PER DIEM | 04/29/94 | 06/27/94 | 06/29/94 | 600.00 | --N/A-- | 07/14/94 | YES |
| | | 5003081 | I | COPAYMENT | 04/29/94 | 04/29/94 | 06/29/94 | 696.00 | --N/A-- | 07/14/94 | YES |
| IVMpatient,ten | 000-80-1887 | 5003088 | O | COPAYMENT | 04/16/94 | 04/16/94 | | 36.00 | --N/A-- | Not Sent | NO |

IVM Output Menu

IVM Case Inquiry

Introduction

This option allows you to review the status of any Means Test or Co-Pay Exemption Test submitted to the HEC for verification. All Means Test and billing/collection transmissions for the case are displayed. Any uploadable data associated with the case is indicated.



The data used for this report is from the Means Test module of the PIMS software.

Example

```
Select PATIENT NAME: IVMpatient,test      02-08-52      000456110      NO
      NSC VETERAN

>>>> Case Record is for Income Year 1993 <<<<

DEVICE: HOME// <RET> Decnet      RIGHT MARGIN: 80// <RET>
```

```
IVM Case Inquiry      Aug 11, 1994@08:24:17      Page: 1
-----
      Name: IVMpatient,test      Awaiting Trans: NO
      SSN: 000-45-6110      Case Status: CLOSED
Inc Year: 1993      Full Transmission Sent: 07/14/94
      MT Date: 07/11/94 (MT COPAY EXEMPT)
-----
      --- T H I S C A S E R E C O R D H A S B E E N C L O S E D ---

Closure Reason: CASE WAS NOT VERIFIED
Closure Source: IVM CENTER
Closure Date: Jul 19, 1994@15:29:02
-----

Means Test Transmission History:

Trans Date/Time      Status      Transmitted As
MT Cat      Had Ins?
-----
Jul 14, 1994@09:29:32 RECEIVED      MT COPAY EXEMPT      NO
Jul 19, 1994@12:27:34 RECEIVED      MT COPAY EXEMPT      NO
```

IVM Output Menu

Means Test Comparison Report

Introduction

This management report provides a summary of all Means Tests for two consecutive years for veterans who are MT Copay Exempt or MT Copay Required. It lists the total number of veterans in each category, the number of veterans who have changed Means Test category over the two year period, the number of new Means Tests (veterans Means Tested in the second year only) and the number of "non-returns" (veterans Means Tested in the first year only). A detailed report listing each veteran with both years' Means Test category is also available.

This report could be run regularly to judge the shift of veterans from the mandatory to discretionary category, and to estimate the number of potential cases that will be referred to the HEC for verification.



All data used for this report is from PIMS files.

Example

```

IVM MEANS TEST COMPARISON REPORT

This report will be used to analyze consecutive years' Means Test data
(i.e. 1991-1992). Please enter the first year for the two year period
which you would like to analyze.

Enter first means test YEAR (1986 - 1993): 1992 (1992)
Means Test YEAR 1: 1992
Means Test YEAR 2: 1993

Would you like to print patient data? NO// y YES
NOTE: The output is designed to use 80 columns.
DEVICE: HOME// <RET> Decnet    RIGHT MARGIN: 80// <RET>

```

IVM Output Menu

Means Test Comparison Report

Example, cont.

| JUL 8,1994 | | PAGE: 1 | |
|---|-------------|--------------------------------|--------------------------------|
| M E A N S T E S T C O M P A R I S O N R E P O R T | | | |
| FOR YEARS: 1992 AND 1993 | | | |
| ----- | | | |
| PATIENT | SSN | MEANS TEST CATEGORY 1992 | MEANS TEST CATEGORY 1993 |
| IVMpatient,eleven | 000-01-0101 | A | C |
| IVMpatient,twelve | 000-66-9999 | | C |
| IVMpatient,thirteen | 000-93-8276 | | A |
| IVMpatient,five | 000-57-4321 | | A |
| IVMpatient,fourteen | 000-98-4587 | A | |
| IVMpatient,fifteen | 000-10-9937 | A | A |
| IVMpatient,sixteen | 000-09-7714 | | C |

| JUL 8,1994 | | PAGE: 20 | |
|--|-----|----------|--|
| M E A N S T E S T C O M P A R I S O N R E P O R T | | | |
| FOR YEARS: 1992 AND 1993 | | | |
| ----- | | | |
| SUMMARY OF MEANS TESTS FOR YEAR 1992 | | | |
| ===== | | | |
| TOTAL CAT A: | 29 | | |
| TOTAL CAT C: | 77 | | |
| TOTAL MEANS TESTS: | 106 | | |
| SUMMARY OF MEANS TESTS FOR YEAR 1993 | | | |
| ===== | | | |
| TOTAL CAT A: | 36 | | |
| TOTAL CAT C: | 45 | | |
| TOTAL MEANS TESTS: | 81 | | |
| TOTAL NON-RETURNS FROM 1992 TO 1993: 89 | | | |
| TOTAL NEW MEANS TESTS FROM 1992 TO 1993: 64 | | | |
| TOTAL PATIENTS WHOSE CATEGORY CHANGED FROM A TO C: 2 | | | |
| TOTAL PATIENTS WHOSE CATEGORY CHANGED FROM C TO A: 3 | | | |

IVM Output Menu

IVM Address Change Log Report

Introduction

This option generates a report of updates made to *prior* patient addresses within a specified date range. The report may take a long time to generate; you might want to queue it to print at a later time. You can select from the following report types:

| Report Type | Description | About the Report |
|-------------|---|---|
| Summary | Displays all patients who had address changes in a user-selected 90-day period | <ul style="list-style-type: none"> • You can choose to sort by patient name or SSN. • You must enter an ending date of a 90-day period. • The output returns all entries in the IVM ADDRESS CHANGE LOG file (#301.7) where the date of the ADDRESS CHANGE DT/TM field (#.01) is within the 90-day period. • For each patient, the output includes: <ul style="list-style-type: none"> ○ Patient's SSN ○ Patient's name ○ Date and time of the last address update ○ The number of entries in the IVM ADDRESS CHANGE LOG file (#301.7) • At the end of the report, you will see the total number of records found meeting the criteria. |
| Detailed | Displays all previous addresses for an individual patient in a user-selected 90-day period Note: The report does <i>not</i> list <i>current</i> addresses. | <ul style="list-style-type: none"> • You must select a patient. • You must enter an ending date of a 90-day period. • The output returns all entries in the IVM ADDRESS CHANGE LOG file (#301.7) where the date of the ADDRESS CHANGE DT/TM field (#.01) is within the 90-day period for the patient you selected. • The output includes: <ul style="list-style-type: none"> ○ Patient's SSN ○ Patient's name ○ Date of address update ○ Previous address ○ Bad Address Indicator (BAI) ○ Previous address change source ○ Previous address change site • At the end of the report, you will see the total number of records found meeting the criteria. |



The data used for this report is from the IVM ADDRESS CHANGE LOG file (#301.7).

IVM Output Menu

IVM Address Change Log Report

Example - Summary

| IVM ADDRESS CHANGE LOG REPORT | | | | Page: 1 |
|---|------------------|-----------------------|-----------|---------|
| Jan 10, 2006 THRU Apr 10, 2006 | | | | |
| SSN | NAME | LAST UPDATED | # ENTRIES | |
| --- | ---- | ----- | ----- | |
| 000123214 | IVMPATIENT,ONE | Feb 28, 2006@11:18:19 | 15 | |
| 000666322 | IVMPATIENT,TWO | Jan 31, 2006@15:13:13 | 2 | |
| 000723555 | IVMPATIENT,THREE | Feb 23, 2006@19:42:21 | 2 | |
| 000705497 | IVMPATIENT,FOUR | Feb 01, 2006@11:25:51 | 3 | |
| Total records found meeting criteria: 4 | | | | |

Example - Detailed

| IVM ADDRESS CHANGE LOG REPORT | | | | Page: 1 |
|---|-----------------|--------------|--|---------|
| Jan 11, 2006 THRU Apr 11, 2006 | | | | |
| SSN | NAME | CHANGE DATE | PRIOR ADDRESS | |
| --- | ---- | ----- | ----- | |
| 000705497 | IVMPATIENT,FOUR | Jan 27, 2006 | 6222 ROYAL FOREST BLVD COLUMBUS, OH 43202 SOURCE: VAMC SITE: PHOENIX-RO BAI: UNDELIVERABLE | |
| 000705497 | IVMPATIENT,FOUR | Jan 31, 2006 | 438 ROYAL FOREST BLVD COLUMBUS, OH 43212 SOURCE: VAMC SITE: PHOENIX-RO | |
| 000705497 | IVMPATIENT,FOUR | Feb 01, 2006 | 438 ROYAL FOREST BLVD COLUMBUS, OH 43212 SOURCE: VAMC SITE: PHOENIX-RO | |
| Total records found meeting criteria: 3 | | | | |

IVM System Manager's Menu

IVM Parameter Enter/Edit



This option is locked with the IVM SYS security key.

Introduction

The IVM parameters control whether notification messages are sent to the IVM MESSAGES mail group when SSN and demographics information is received from the HEC. If no entry is made, the messages are generated.

Please refer to Appendix A of this manual for sample mail messages.

Example

```
IVM Parameter Enter/Edit
SUPPRESS SSN UPLOAD MESSAGE: ?
  Enter 1 to suppress notification to facility that updated SSN data has
  been received from the IVM Center.  Enter 0 if facility is to be notified.
  Default is 0.
  CHOOSE FROM:
    1          SUPPRESS MESSAGE
    0          DON'T SUPPRESS MESSAGE
SUPPRESS SSN UPLOAD MESSAGE: 0  DON'T SUPPRESS MESSAGE
SUPPRESS DEMOGRAPHIC MESSAGE: 0  DON'T SUPPRESS MESSAGE
```

IVM System Manager's Menu

Purge IVM Transmissions



This option is locked with the IVM SYS security key.

Introduction

This option allows IRM staff to purge entries from the IVM TRANSMISSION LOG File (#301.6) that are associated with closed cases (entries in the IVM PATIENT File [#301.5]) from the previous Means Test year.

A notification is sent to the user indicating that the purge has completed, the total number of records checked, number of closed records found, and number of records deleted.

Please refer to Appendix A of this manual for a sample mail message.

Example

This option is used to purge data from the IVM TRANSMISSIONS File (#301.6). Entries in this file will only be purged for corresponding case records in the IVM PATIENT File (#301.5) which have been closed.

You may purge transmission records for an entire income year's worth of cases. However, you must select an income year prior to the year which corresponds to the current year's Means Tests. Since this year's Means Tests are based on 1993 income, you must select an income year prior to 1993.

Select the Income Year for which to purge transmissions: **1992** (1992)

Is it okay to queue this job? **y** YES

Requested Start Time: NOW// **<RET>** (JUL 08, 1994@14:12:53)

This job has been queued. The task number is 20474.

IVM System Manager's Menu

IVM Transmission Report



This option is locked with the IVM SYS security key.

Introduction

The IVM Transmission Report allows you to analyze the number of Initial or Full transmissions leaving your facility for a specific date or range. The total number of transmissions is broken down by the transmission status:

Transmitted - An attempt has been made to send the transmission to the HEC. The transmission may or may not have left your facility, but it has not been acknowledged by the HEC.

Received - The transmission has been successfully acknowledged by the HEC.

In Error - The transmission has been acknowledged by the HEC as having contained erroneous or invalid data.

Re-transmitted - A transmission with the status of "transmitted" may be retransmitted after three days. At that time, a new transmission record is created. The status of the original transmission is updated to "retransmitted."

The number of multiple transmissions is listed. If more than one transmission for an income case has been sent to the HEC (this would occur if the Means Test or demographics data for the veteran was edited), each successive transmission is considered to be a multiple transmission for a specific income case.

Summary statistics for the number of MT Copay Exempt and MT Copay Required veterans with and without active insurance are provided. A listing of the receipt date and response date for each Master Query received by the facility is also included.

IVM Transmission Error Processing

Introduction

The Health Eligibility Center may respond to a patient transmission by returning an error message, which means they were unable to process the transmission. The IVM Transmission Error Processing option allows you to work with lists of patients for which error messages were received in a List Manager format. This information was previously viewed through “Erroneous Data Sent to the HEC” mail messages for each individual patient.

The contents of the list are selected by a user-specified date range. The initial display shows the “New” process status and is sorted by patient name. You may use the following actions to make changes to the displayed list.

| | |
|----------------------|--|
| Change Date Range | Change the date range of the errors being viewed. |
| Change List | Change the error list being viewed. You may choose to see errors with a status of new, checked, or both. |
| Check Error Off List | Changes the selected error with a status of New to a status of Checked. Checked indicates the error has been viewed. |
| Retransmit Patient | Sets a flag to retransmit the selected patient. The transmission will take place during the nightly job. |
| Sort List | Choose to sort the error list by patient name, date/time, and or error message acknowledgment received. The system allows the user the ability to change the sort consistency based upon the current functionality. In the event the user selects “no sort criteria”, the system will automatically use current default sort list. |

Example

```
Select Beginning Date: OCT 07, 1997// <RET> (OCT 07, 1997)
Select Ending Date: TODAY// <RET> (OCT 21, 1997)
...EXCUSE ME, JUST A MOMENT PLEASE.....
```

IVM Transmission Error Processing

Example, cont.

| IVM Transmission Errors | | Oct 21, 1997 08:45:48 | Page: 1 of 13 | |
|---|-----------------------------|------------------------------------|------------------------|----------------|
| Sort By: Patient Name | | Date Range: 10/07/97 thru 10/21/97 | | |
| Error Processing Statuses: New | | | | |
| | Patient Name | PT ID | Date/Time ACK Received | Process Status |
| 1 | IVMpatient, eighteen | 1555 | Oct 07, 1997 13:48:29 | New |
| | Error: PATIENT NAME INVALID | | | |
| 2 | IVMpatient, nineteen | 1555 | Oct 07, 1997 13:48:30 | New |
| | Error: PATIENT NAME INVALID | | | |
| 3 | IVMpatient, twenty | 1558 | Oct 07, 1997 13:48:29 | New |
| | Error: PATIENT SSN INVALID | | | |
| + * = Patient has been flagged for transmission >>> | | | | |
| CD | Change Date Range | CL | Change List | SL Sort List |
| CE | Check Error Off List | RP | Retransmit Patient | |
| Select Action: Next Screen// CE Check Error Off List | | | | |
| Select Transmission Error(s): (1-3): 1 | | | | |

| IVM Transmission Errors | | Oct 21, 1997 08:45:48 | Page: 1 of 13 | |
|---|-----------------------------|------------------------------------|------------------------|----------------|
| Sort By: Patient Name | | Date Range: 10/07/97 thru 10/21/97 | | |
| Error Processing Statuses: New | | | | |
| | Patient Name | PT ID | Date/Time ACK Received | Process Status |
| 1 | IVMpatient, eighteen | 1555 | Oct 07, 1997 13:48:29 | Checked |
| | Error: PATIENT NAME INVALID | | | |
| 2 | IVMpatient, nineteen | 1555 | Oct 07, 1997 13:48:30 | New |
| | Error: PATIENT NAME INVALID | | | |
| 3 | IVMpatient, twenty | 1558 | Oct 07, 1997 13:48:29 | New |
| | Error: PATIENT SSN INVALID | | | |
| + * = Patient has been flagged for transmission >>> | | | | |
| CD | Change Date Range | CL | Change List | SL Sort List |
| CE | Check Error Off List | RP | Retransmit Patient | |
| Select Action: Next Screen// | | | | |

IVM Financial Query

Introduction

The IVM Main Menu allows you to manually generate financial queries to the HEC for patients that require updated income Means Test, Copay Test, and Income Screening information. The prompts ask you to select a patient, verify that you want to send a financial query, and if you want to receive notification when a reply is received.

You cannot send a query if

- A query is already pending for the selected patient.
- No financial query is required for the selected patient. (For example, the patient is in Enrollment Priority Group 1.)

Example

```

This option allows queries to be sent to the Health Eligibility
Center (HEC) for patients that require updated income information.

Select PATIENT NAME: IVMpatient,t      IVMpatient,t      3-26-66      105032666
      NO      NSC VETERAN      SH
Enrollment Priority:      Category: IN PROCESS      End Date:

      *** Patient Requires a Means Test ***

      Patient's Test dated DEC 21,1998 is MT COPAY EXEMPT. The test
      date is greater than 365 days old. Please update.

Enter <RETURN> to continue.

Financial query queued to be sent to the HEC...

Would you like to send a financial query for this patient? YES//
Do you want to be notified when a query reply is received? YES//
Failure to send query: A FINANCIAL QUERY IS CURRENTLY OPEN OR JUST SENT

```

Glossary

This glossary contains terms and their definitions as they relate to the IVM package.

| | |
|---------------------------|--|
| MT Copay Exempt veteran | A patient who, as a result of Means Testing, is in the mandatory category in regard to eligibility for VA care. |
| MT Copay Required veteran | A patient who, as a result of Means Testing, is in the discretionary category in regard to eligibility for VA care. |
| full data transmission | A complete information profile transmitted to the HEC containing patient demographic, eligibility, Means Test, income, insurance, and enrollment information. |
| HEC | Health Eligibility Center (formerly IVM Center) |
| HL7 | Health Level 7 is an interface specification designed to standardize the way in which health care information is transferred between systems. IVM utilizes the VISTA HL7 package to assist in transporting data using this specification. |
| IRS | Internal Revenue Service |
| IVM | Income Verification Match. A program designed to verify income and insurance data reported by the veteran with that received from IRS (Internal Revenue Service), SSA (Social Security Administration), and other sources. |

| | |
|-------------------|---|
| Means Test | Eligibility for VA hospital care and nursing home care is divided into two categories - mandatory and discretionary. An income assessment is made to determine whether a non service-connected veteran, who is not in receipt of VA monetary benefits or otherwise exempt from income assessment, is eligible for cost-free VA medical care. This income assessment is known as "Means Testing." Patients whose income is above the defined income levels must agree to make copayments to VA for outpatient and inpatient care rendered. |
| SSA | Social Security Administration |
| suggested SSN | Patient or spouse SSNs returned from SSA as possible matches based on name, sex, and date of birth. These SSNs will be validated by the HEC before being returned to the field facilities. |
| third party claim | When a party other than the patient, such as an insurance company, is billed. |

Military Time Conversion Table

| STANDARD | MILITARY |
|----------------|------------|
| 12:00 MIDNIGHT | 2400 HOURS |
| 11:00 PM | 2300 HOURS |
| 10:00 PM | 2200 HOURS |
| 9:00 PM | 2100 HOURS |
| 8:00 PM | 2000 HOURS |
| 7:00 PM | 1900 HOURS |
| 6:00 PM | 1800 HOURS |
| 5:00 PM | 1700 HOURS |
| 4:00 PM | 1600 HOURS |
| 3:00 PM | 1500 HOURS |
| 2:00 PM | 1400 HOURS |
| 1:00 PM | 1300 HOURS |
| 12:00 NOON | 1200 HOURS |
| 11:00 AM | 1100 HOURS |
| 10:00 AM | 1000 HOURS |
| 9:00 AM | 0900 HOURS |
| 8:00 AM | 0800 HOURS |
| 7:00 AM | 0700 HOURS |
| 6:00 AM | 0600 HOURS |
| 5:00 AM | 0500 HOURS |
| 4:00 AM | 0400 HOURS |
| 3:00 AM | 0300 HOURS |
| 2:00 AM | 0200 HOURS |
| 1:00 AM | 0100 HOURS |

Appendix A - Sample Mail Messages

Following are samples of the types of electronic mail notifications generated by the IVM software. You might also receive messages generated by other **VISTA** software packages, such as the notification generated by PIMS to indicate a changed SSN, or the notification of new insurance sent by IB.

*The patient's name and last four digits of the SSN have been added to the subject line of some messages with patch number IVM*2*3.*

Completed Purge of IVM Transmission Records

```
Subj: COMPLETED PURGE OF IVM TRANSMISSION RECORDS [#186481] 11 Aug 94 08:04 11 Lines
From: INCOME VERIFICATION MATCH PACKAGE in 'IN' basket. Page 1 **NEW**
-----
The purge of data from the IVM TRANSMISSIONS File (#301.6) has completed.

Job Start Date/Time: AUG 11, 1994@08:09:28
Job End Date/Time: AUG 11, 1994@08:19:26

Income Year: 1992

Total number of case file records checked: 2236
Number of closed case records found: 340
Number of IVM TRANSMISSION records deleted: 697
```


IVM - Means Test Upload

Subj: IVM - MEANS TEST UPLOAD [#117931] 25 Jul 94 15:33 7 Lines
 From: IVM PACKAGE in 'IN' basket. Page 1 **NEW**

 The following error occurred when an Income Verification Match verified
 Means Test was being uploaded for the following patient:

NAME: IVMpatient,twenty-three
 ID: 000-23-8405
 ERROR: Can't find 408.12 record

Subj: IVM - MEANS TEST UPLOAD for IVMpatient (8405) [#117931] 25 Jul 94 15:33
 11 Lines
 From: IVM PACKAGE in 'IN' basket. Page 1 **NEW**

 An Income Verification Match verified Means Test has been uploaded
 for the following patient:

NAME: IVMpatient,twenty-three
 ID: 000-23-8405
 DATE OF TEST: SEP 12, 1993
 PREV CATEGORY: A
 NEW CATEGORY: C
 DATE/TIME OF ADJUDICATION: SEP 18,1994@11:21

The patient is now NON-EXEMPT for prescription copay.

The patient's current Means Test status is now MT COPAY REQUIRED.

The patient is MT COPAY REQUIRED and doesn't agree to pay deductible.

IVM - Means Test Deleted

Subj: IVM - MEANS TEST DELETED [#190091] 28 Sep 94 15:46 6 Lines
 From: IVM PACKAGE in 'IN' basket. Page 1 **NEW**

 An Income Verification Match Means Test was deleted for the
 following patient:

NAME: IVMpatient,twenty-four
 ID: 000-21-0000
 TEST DATE : AUG 16,1994

NOTE: The original DHCP Means Test is now the primary Means Test.

Messages Awaiting Transmission

Sent when MailMan V. 7.1 is installed at the site and a message is awaiting transmission to the HEC.

```
Subj: MESSAGES 'AWAITING TRANSMISSION'      [#117931] 25 Jul 94 15:33  6 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1  **NEW**
```

Mailman message number 435938 is awaiting transmission.
Please call the IVM Center (Atlanta, GA) to play a script
if unable to complete script from your end.

Please note that you may have other messages that are awaiting
transmission to the IVM Center.

Error Message From the HEC

```
Subj: ERROR MESSAGE FROM THE IVM CENTER  [#188441] 02 Sep 94 13:16  9 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1
```

An Insurance Confirmation message or a Billing/Collections Transmission
was rejected by the IVM Center with the following error:

Patient ID/SSN not in IVM database - DFN 150

Mailman Message # of Acknowledged Transmission: 187928

If you are unable to find the source of this problem,
please contact your ISC Support Group or the IVM Center.

Missing Primary Long ID Field

```
Subj: MISSING PRIMARY LONG ID FIELD  [#195643] 22 Mar 95 07:51  5 Lines
From: IVM PACKAGE  in 'IN' basket.   Page 1
```

During Income Verification Match processing, the PRIMARY LONG ID field
(.363) of PATIENT File (#2) is missing for the following patient:

NAME: IVMpatient,twenty-four
DFN: 0009017

Appendix B - List Manager

The List Manager is a tool used to display a list of items in a screen format with the following functionality.

- Browse through the list
- Select items that need action
- Take action against those items
- Select other List Manager actions without leaving the option

Actions are selected by entering the name or mnemonic at the "Select Action:" prompt. Entries may be preselected in the following manner:

DU=1 will display upload for entry 1

In addition to the various actions that are available specific to the option you are using, List Manager provides generic actions applicable to any List Manager screen. You may enter double question marks (??) at the "Select Action" prompt for a list of all actions available. The table below lists generic List Manager actions with a brief description. Entering the mnemonic is the quickest way to select an action.

| Action | Mnemonic | Description |
|----------------------|----------|---|
| Next Screen | + | Move to the next screen |
| Previous Screen | - | Move to the previous screen |
| Up a Line | UP | Move up one line |
| Down a Line | DN | Move down one line |
| Shift View to Right | > | Move the screen to the right if the screen width is more than 80 characters |
| Shift View to Left | < | Move the screen to the left if the screen width is more than 80 characters |
| First Screen | FS | Move to the first screen |
| Last Screen | LS | Move to the last screen |
| Go to Page | GO | Move to any selected page in the list |
| Re Display Screen | RD | Redisplay the current screen |
| Print Screen | PS | Print the header and the portion of the list currently displayed |
| Print List | PL | Print the list of entries currently displayed |
| Search List | SL | Find selected text in list of entries |
| Auto Display(On/Off) | ADPL | Toggle the menu of actions to be displayed/not displayed automatically |
| Quit | QU | exits the screen |

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