

Department of Veterans Affairs

VistA Fee Separation of Duties (FB*3.5*151)

Version Description Document



August 2014

Version 0.1

Revision History

Note: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

Date	Version	Description	Author
8/27/14	0.1	Initial Version with instructions removed by PM	

Artifact Rationale

The Version Description Document (VDD) is the primary configuration control document used to track and control versions of software to be released to the operational environment. It is a summary of the features and contents for the software build. It identifies and describes the version of the software being delivered, including all changes to the software since the last VDD was issued. Every release of the software (including the initial release) shall be described by a VDD. Without this document, it would be nearly impossible to move an application or system from development to deployment reliably. Therefore the document is mandatory for each deployment.

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1. Scope

This VDD is for Fee Basis patch FB*3.5*151 (RETAIN HISTORICAL DATA ENHANCEMENT) of the Veterans Health Information Systems and Technology Architecture (Vista) Fee Separation of Duties project (01-02-03-03-047), VHA Release Management Control Number RR14-00214.

2. Version Description

This is the first of two Vista Fee Basis v. 3.5 patches for the Vista Fee Separation of Duties project. This patch enhances Fee Basis to retain historical data for selected fields in order to maintain complete records on actions for accounting, information integrity and control. The second patch, FB*3.5*154, will be released at a later time and it contains enhancements to enforce separation of duties.

Patch FB*3.5*151 will enhance the Fee Basis package as follows:

1. RETAIN DATE OF REQUEST FOR ADDITIONAL INFORMATION LETTER

This patch adds the DATE REQ INFO SENT (#19.6) field to the FEE BASIS UNAUTHORIZED CLAIMS (#162.7) file. This field contains the most recent date a request for additional information letter was sent for the claim. This field is automatically populated by the software when letters are generated and when the Update Date Letter Sent [FBUC UPDATE DATE LETTER SENT] option is used. The field will not reflect activity that occurred prior to installation of the patch.

2. AUDIT VALUE OF 13 DATA FIELDS FOR UNAUTHORIZED CLAIMS

This patch enhances the software to maintain a history of changes to the value of thirteen fields in the FEE BASIS UNAUTHORIZED CLAIMS (#162.7) file. The system will retain the date and time of the change, the old value, the new value, and the person that made the change. Once the patch is installed the system will retain this information for the following fields:

- STATUS (#24)
- DISPOSITION (#10)
- DATE CLAIM RECEIVED (#01)
- DATE REQ INFO SENT (#19.6)
- DATE VALID CLAIM RECEIVED (#7)
- DATE OF DISPOSITION (#11)
- REOPEN CLAIM DATE (#21)
- NOTICE OF DISAGREEMENT RECV'D (#50)
- STATEMENT OF THE CASE ISSUED (#51)
- DATE SUBSTANTIVE APPEAL RECV'D (#52)
- DATE APPEAL DISPOSITIONED (#53)
- DATE APPEALED TO COVA (#54)
- DATE COVA APPEAL DISPOSITIONED (#55)

3. MODIFY DISPLAY UNAUTHORIZED CLAIM OPTION

This patch modifies the Display Unauthorized Claim [FBUC DISPLAY UNAUTHORIZED] option to optionally show historical data. After a claim has been selected the option will either state there is no historical audit data for the claim or it will ask 'Show historical audit data? NO/'. If the user responds YES to the question the output will include a new section that displays all changes to the value of the thirteen monitored fields since installation of this patch.

An example of the new output section follows:

< HISTORICAL AUDIT DATA (since patch FB*3.5*151)>

CHANGED DATE/TIME: MAR 12, 2014@14:13:18
FIELD: NOTICE OF DISAGREEMENT RECV'D NEW VALUE: MAR 12, 2014
CHANGED BY: FEECLERK,FIRST A
CHANGED DATE/TIME: MAR 12, 2014@14:13:19
FIELD: STATUS OLD VALUE: DISPOSITIONED
NEW VALUE: APPEAL/NOTICE OF DISAGREE RECV
CHANGED BY: FEECLERK,FIRST A

4. AUDIT VALUE OF 5 DATA FIELDS FOR AUTHORIZATIONS

This patch enhances the software to maintain a history of changes to the value of five fields in the AUTHORIZATION multiple of the FEE BASIS PATIENT (#161) file. The system will retain the date and time of the change, the old value, the new value, and the person that made the change. Once the patch is installed the system will retain this information for the following fields:

FROM DATE (#.01)
TO DATE (#.02)
DISCHARGE TYPE (#.06)
PURPOSE OF VISIT CODE (#.07)
TREATMENT TYPE CODE (#.095)

5. ADD HISTORICAL AUTHORIZATION DATA REPORT

This patch adds a new menu option called Historical Authorization Data Report [FBAA AUTH DATA AUDIT RPT]. The option displays the current authorization data and the historical audit data for an authorization. The historical audit data displays all changes to the value of the five monitored fields since installation of this patch. This option is located on the Outputs Main Menu [FBAA OUTPUTS MENU] under the Medical Fee Main Menu [FBAA MEDICAL MAIN MENU].

An example of the new report follows:

Historical Authorization Data Report MAR 13, 2014@15:11:09
Patient: FEEPATIENT,FEE C Pt.ID: 000-00-5401

Current Authorization Data:

FROM DATE: MAR 13, 2014 TO DATE: APR 15, 2014
FEE PROGRAM: OUTPATIENT PRIMARY SERVICE AREA: ALBANY
PURPOSE OF VISIT CODE: OPT - SC 50% OR MORE
TREATMENT TYPE CODE: SHORT TERM FEE STATUS
PATIENT TYPE CODE: MEDICAL ACCIDENT RELATED (Y/N): NO
POTENTIAL COST RECOVERY CASE: NO CLERK: BAUMANN,SCOTT A
PRINT AUTHORIZATION (Y/N): Y

Historical Audit Data (since patch FB*3.5*151):

CHANGED DATE/TIME: MAR 13, 2014@15:09:12

FIELD: FROM DATE NEW VALUE: MAR 13, 2014

CHANGED BY: FEECLERK,FIRST

CHANGED DATE/TIME: MAR 13, 2014@15:09:50

FIELD: TO DATE NEW VALUE: APR 12, 2014

CHANGED BY: FEECLERK,FIRST

CHANGED DATE/TIME: MAR 13, 2014@15:09:50

FIELD: PURPOSE OF VISIT CODE NEW VALUE: OPT - SC 50% OR MORE

CHANGED BY: FEECLERK,FIRST

CHANGED DATE/TIME: MAR 13, 2014@15:09:50

FIELD: TREATMENT TYPE CODE NEW VALUE: SHORT TERM FEE STATUS

CHANGED BY: FEECLERK,FIRST

CHANGED DATE/TIME: MAR 13, 2014@15:10:55

FIELD: TO DATE OLD VALUE: APR 12, 2014

NEW VALUE: APR 15, 2014 CHANGED BY: FEECLERK,FIRST

The definition of the KIDS Build, which the Transport a Distribution [XPD TRANSPORT PACKAGE] option uses when generating the distribution, is detailed below. Note that it is analogous to a Make file for distributions from some other programming languages.

PACKAGE: FB*3.5*151 Aug 14, 2014 10:15 pm PAGE 1

 TYPE: SINGLE PACKAGE TRACK NATIONALLY: YES
 NATIONAL PACKAGE: FEE BASIS ALPHA/BETA TESTING: NO

DESCRIPTION:

This patch is the first of two patches that enhance the Fee Basis package per the requirements of the Vista Fee Separation of Duties project. This patch makes the following changes to Fee Basis:

- o Retain historical data for unauthorized claims
- o Retain historical data for authorizations

ENVIRONMENT CHECK:

PRE-INIT ROUTINE:
 POST-INIT ROUTINE: PS^FBXIP151
 PRE-TRANSPORT RTN:

DELETE ENV ROUTINE:
 DELETE PRE-INIT ROUTINE:
 DELETE POST-INIT ROUTINE: No

FILE #	FILE NAME	UP DATE DD	SEND SEC. CODE	DATA COMES W/FILE	SITE DATA	RSLV PTRS	USER OVER RIDE
161	FEE BASIS PATIENT	YES	YES	NO			NO
Partial DD:	subDD: 161.01	fld: .01					
		fld: .02					
		fld: .06					
		fld: .07					
		fld: .095					
	subDD: 161.193						
162.7	FEE BASIS UNAUTHORIZED CLAIMS	YES	YES	NO			NO
Partial DD:	subDD: 162.7	fld: .01					
		fld: 7					
		fld: 10					
		fld: 11					
		fld: 19.5					
		fld: 19.6					
		fld: 21					
		fld: 24					
		fld: 50					
		fld: 51					
		fld: 52					
		fld: 53					
		fld: 54					
		fld: 55					
	subDD: 162.793						

ROUTINE:

FBAAAUD
 FBAAAUDR
 FBSHAUT
 FBUCAUD
 FBUCDIS
 FBXIP151

ACTION:

SEND TO SITE
 SEND TO SITE
 SEND TO SITE
 SEND TO SITE
 SEND TO SITE
 SEND TO SITE

OPTION:

FBAA AUTH DATA AUDIT RPT
 FBAA OUTPUTS MENU

ACTION:

SEND TO SITE
 USE AS LINK FOR MENU/ITEM/SUBSCRIBERS

The distribution was generated in the M VistA Caché development namespace MNTVBB at the Albany OI&T Field Office.

3. Change Request Reports

Table 1 provides a summary for each Change Request

Table 1: Change Request for This Release

Change Request ID	Summary
NSR 20090309	Emergency Patch VistA Fee – Separation of Duties – Assignment of Keys
VistA Fee- Separation of Duties Request #20090309 Business Requirements Document	BRD built upon analysis of the NSR
Section 2.6.2 of VFSOD Requirements Specification Document	The project will enhance the Fee Basis package to retain historical data in order to maintain complete records on actions for accounting, information integrity and control. (This section of the RSD defines in greater detail the goal of this delivery.)

These documents are available on this project's TSPR website:



4. Release Inventory

Table 2 lists the release inventory.

Table 2: Inventory of Release Components

Release Component	Description	Method of Delivery	Recipient	Location
FB*3.5*151 TEST v 7, which contains KIDS distribution Build 14, generated May 19, 2014	RETAIN HISTORICAL DATA ENHANCEMENT	KIDS PackMan message from Forum Patch Module	OI&T staff supporting VistA instances	Regional Data Processing Centers or VAMCs
FEE3_5_UM_R0814.PDF	Fee Basis v3.5 User Manual	VistA Document Library	Fee Basis ADPACs	VAMCs
FEE3_5_TM_R0814.PDF	Fee Basis v3.5 Technical Manual	VistA Document Library	Fee Basis ADPACS	VAMCs
FB*3.5*151 Patch Description	The patch's entry in the National Patch Module on Forum. It provides background on the patch's functionality and includes patch installation instructions.	Available online on the Forum system (Software Services Primary Menu/ Patch User Menu/ Display a Patch)	End users, ADPACs, OI&T staff, and others	Available on the VA WAN

Patch Components:

Files & Fields Associated:

File Name (Number)	Field Name (Number)	New/Modified/Deleted
-----	-----	-----
FEE BASIS PATIENT (#161)	FROM DATE (#.01)	Added Cross-reference
AUTHORIZATION multiple	TO DATE (#.02)	Added Cross-reference
	DISCHARGE TYPE (#.06)	Added Cross-reference
	PURPOSE OF VISIT CODE (#.07)	Added Cross-reference
	TREATMENT TYPE CODE (#.095)	Added Cross-reference
	DATA AUDIT (#293)	New
FEE BASIS UNAUTHORIZED CLAIMS (#162.7)	DATE CLAIM RECEIVED (#.01)	Added Cross-reference
	DATE VALID CLAIM RECEIVED	Added Cross-reference

(#7)
DISPOSITION (#10) Added Cross-reference
DATE OF DISPOSITION (#11) Added Cross-reference
DATE LETTER SENT (#19.5) Added Cross-reference
DATE REQ INFO SENT (#19.6) New
REOPEN CLAIM DATE (#21) Added Cross-reference
STATUS (#24) Added Cross-reference
NOTICE OF DISAGREEMENT Added Cross-reference
RECV'D (#50)
STATEMENT OF THE CASE Added Cross-reference
ISSUED (#51)
DATE SUBSTANTIVE APPEAL Added Cross-reference
RECV'D (#52)
DATE APPEAL DISPOSITIONED Added Cross-reference
(#53)
DATE APPEALED TO COVA Added Cross-reference
(#54)
DATE COVA APPEAL Added Cross-reference
DISPOSITIONED (#55)
DATA AUDIT (#293) New

Index (Cross Reference)Name	File	Type
AILT	162.7	MUMPS
AUD	161/161.01	MUMPS
AUD	162.7	MUMPS

Forms Associated: N/A

Mail Groups Associated: N/A

Options Associated:

Option Name	Type	New/Modified/Deleted
FBAA AUTH DATA AUDIT RPT	Routine	New
FBAA OUTPUTS MENU	Menu	Use as Link

Protocols Associated: N/A

Security Keys Associated: N/A

Templates Associated: N/A

Additional Information: N/A

	Before	After	Second Line
Routines:	Checksum	Checksum	Patch List
FBAAAUD	n/a	B5207373	**151**
FBAAAUDR	n/a	B6423644	**151**
FBSHAUT	B73848186	B76425162	**13,108,151**
FBUCAUD	n/a	B6338424	**151**
FBUCDIS	B16705793	B20964227	**32,151**
FBXIP151	n/a	B1135179	**151**

4.1. Electronic Media Released

Mail Message from the Forum Patch Module containing a KIDS PackMan distribution of the patch is distributed to the sites by the VistA Fee Basis Release Manager.

This patch also distributes documentation as described below.

Documentation Retrieval Instructions:

Updated documentation describing the new functionality introduced by this patch is available.

The preferred method is to FTP the files from

[REDACTED]

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

[REDACTED]

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

Documentation can also be found on the VA Software Documentation Library at: [REDACTED]

Title	File Name	FTP Mode
Fee Basis User Manual	FEE3_5_UM_R0814.PDF	(binary)
Fee Basis Technical Manual	FEE3_5_TM_R0814.PDF	(binary)

4.2. Physical Media Released

N/A The software and patch description are not distributed via tape or disk, but rather by a MailMan message. The technical and user manuals are available as Adobe Acrobat pdf files on VA servers and on the VistA Document Library (VDL) website, rather than as printed documents.

5. Associated Supporting Documentation

Table 3 lists the support documents that are associated with this deliverable:

Table 3: Associated Supporting Documentation

Document Name	Revision	Date
FB*3.5*151 (RETAIN HISTORICAL DATA ENHANCEMENT) on Forum National Patch Module (includes installation instructions)	Test v7	05/19/2014
Fee Basis User Manual (FEE3_5_UM_R0814.PDF)		
Fee Basis Technical Manual (FEE3_5_TM_R0814.PDF)		

6. Certification

The Configuration Manager for this release certifies that the contents of the packaged release defined by this VDD consist of artifacts archived in the Forum National Patch Module CM environment for Fee Basis patch FB*3.5*151 (RETAIN HISTORICAL DATA ENHANCEMENT) as baseline ID FB*3.5*151.

The status of all change requests and code change requests listed in this document in the Change Record Reports section have been verified and are consistent with what is reported here.

Signed

Date

Appendix A. Release Notes Template

A.1. Introduction

The Department of Veterans Affairs was tasked in early 2008 to develop an Access and Separation of Duties Review plan that will be used VA-wide as one of the primary preventative controls to stop fraud, theft, collusion, or unauthorized release of sensitive data. This included the creation of subordinate plans for VHA, VBA and the NCS. The plan for VHA was authored and delivered in January of 2009. An important set of recommendations within the document calls for enhancements in the VistA system to incorporate the separation of duties. This will support the policy provided in VA Volume VIII - Chapter 1, VA Financial Policies and Procedures Administrative Fiscal Policies and Procedures ([h](#) [REDACTED])

This is the first of two Fee Basis patches for the VistA Fee Separation of Duties project. This patch enhances Fee Basis to retain historical data for selected fields in order to maintain complete records on actions for accounting, information integrity and control. The second patch, FB*3.5*154, will be released at a later time and it contains enhancements to enforce separation of duties.

A.1. Purpose

These release notes cover the new features provided to Fee Basis users in this release. All other documents referenced herein can be found at the following websites:

[REDACTED]
[REDACTED]

A.2. Audience

This document targets Non-VA Care (Fee Basis) Clerks and Supervisors using the VistA Fee Basis product and applies primarily to the changes made between this newest release and previous release packages of the software.

A.2. This Release

The following sections provide, in brief, the new features and functions added to FB*3.5*151.

A.3. Features and Functionality

The following table lists the new features added in the FB*3.5*151 release.

Table 2: New FB*3.5*151 Features

Features
Retains Date of Request for Additional Information Letter
Audits Value of 13 Data Fields fro Unauthorized Claims
Display Unauthorized Claim Option Is Modified to Display Historical Data
Audits Value of 5 Data Fields for Authorizations
Adds Historical Authorization Data Report

A.3. Upgrades

The FB*3.5*151 patch should be installed in the Fee Basis patch release sequence order, with all prior patches installed first, especially but not limited to patches FB*3.5*32 and FB*3.5*108.

A.4. Known Issues

There are no known issues.

A.5. Product Documentation

Fee Basis User Manual at URL 

Fee Basis Technical Manual at URL 

FB*3.5*151 (RETAIN HISTORICAL DATA ENHANCEMENT) patch description on the Forum National Patch Module.

Appendix B. Acronyms

B.1. Acronym Table

ACRONYMS AND ABBREVIATIONS

Acronym	Definition
ADPAC	Automated Data Processing Application Coordinator
BRD	Business Requirements Document
CM	Configuration Management
CR	Change Request
FB	VistA software namespace for the Fee Basis Application
Forum	Not an acronym. The national electronic information (e-mail) system.
KIDS	Kernel Installation and Distribution System
MailMan	VistA's electronic mail messaging application which is used to transmit user communications, data, and software distributions.
NCA	National Cemetery Administration
NPM	National Patch Module, which is located on the Forum system
NSR	New Service Request
OI&T	Office of Information and Technology
PackMan	MailMan message containing a software distribution
RSD	Requirements Specification Document
VA	Department of Veterans Affairs
VAMC	VA Medical Center
VBA	Veterans Benefit Administration
VDD	Version Description Document
VDL	VA Software Document Library (formerly known as the VistA or VHA Document Library)
VFSOD	VistA Fee Separation of Duties
VHA	Veterans Health Administration

Acronym	Definition
VistA	Veterans Health Information Systems and Technology Architecture
WAN	Wide Area Network

Appendix C. Installation Instructions

Pre/Post Installation Overview:

The post install routine automatically recompiles any compiled input templates which reference one or more of the following fields in the AUTHORIZATION multiple of the FEE BASIS PATIENT (#161) file:

FROM DATE (#.01)
TO DATE (#.02)
DISCHARGE TYPE (#.06)
PURPOSE OF VISIT CODE (#.07)
TREATMENT TYPE CODE (#.095)

Just the FBAA AUTHORIZATION input template will be recompiled at a site with no local modifications and no locally developed software.

Pre-Installation Instructions:

There are no pre-installation instructions for this patch.

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

If installed during the normal workday, it is recommended that the following selection in the OPTION (#19) file be disabled to prevent possible conflicts while running the KIDS Install. Other VISTA users will not be affected.

Enter Authorization [FBAA ENTER AUTHORIZATION]

Installation Instructions:

-
1. Choose the PackMan message containing this patch.
 2. Choose the INSTALL/CHECK MESSAGE PackMan option.
 3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following options. When prompted for the INSTALL NAME enter the patch #(ex. FB*3.5*151):
 - 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 DDs or templates.
 - b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DDs, templates, etc.).
 - c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the

transport global.

4. From the Installation Menu, select the Install Package(s) option and choose the patch to install.
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//' answer NO unless your system does not do this in a nightly TaskMan process.
6. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//' answer NO.
7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' answer YES if installing during work hours.

When prompted 'Enter options you wish to mark as 'Out Of Order':' Enter the following option:

Enter Authorization [FBAA ENTER AUTHORIZATION]

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

8. If prompted 'Delay Install (Minutes): (0 - 60): 0//' answer 0.

Post-Installation Instructions:

9. (Optional) Delete the FBXIP151 install routine.

Routine FBXIP151 is a post install routine that is invoked when the patch is installed. Routine FBXIP151 can be deleted after a successful installation.

Template Revision History

Date	Version	Description	Author
March 2013	1.1	Formatted to current ProPath documentation standards and edited to conform with latest Alternative Text (Section 508) guidelines	Process Management
January 2013	1.0	Initial Version	PMAS Business Office