Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

RELEASE NOTES/Installation Guide/Rollback Plan

IB\*2.0\*549



Department of Veterans Affairs

December 2015

Version 1.0

Office of Information and Technology (OI&T)

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# Introduction

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\*549

REGISTRATION (DG) V. 5.3 DG\*5.3\*916

The patches (IB\*2.0\*549 and DG\*5.3\*916) are being released in the Kernel Installation and Distribution System (KIDS) multi-build distribution as IB DG BUNDLE 1.0.

The purpose of this patch is to meet the requirements of the Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3 project related to Integrated Billing (IB). eInsurance provides Insurance identification and verification which is vital to the success of the Department of Veterans Affairs (VA) revenue collection process. Accurate insurance information is needed to effectively submit claims and collect payments from third-party payers for medical care and services provided to

Veterans by the Veterans Health Administration (VHA).

## 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 files from ftp://download.vista.domain.ext/. This transmits the files from the first available FTP server. Sites may also elect to retrieve software directly from a specific server as follows:

OI&T FIELD OFFICE FTP ADDRESS DIRECTORY

----------------------------- --------------------- -----------------

Albany ftp.ftpserver.domain.ext [anonymous.software]

Hines ftp.ftpserve.domain.ext [anonymous.software]

Salt Lake City ftp.ftpsrv.domain.ext [anonymous.software]

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.domain/vdl/

Title File Name FTP Mode

-------------------------------------------------------------------------------------------------------

Release Notes/Installation Guide TBD Binary

Technical/Security Manual TBD Binary

Updated User Guide TBD Binary

# Patch Description and Installation Instructions

## Patch Description

==========================================================================

Run Date: DEC 09, 2015 Designation: IB\*2\*549 TEST v

Package : INTEGRATED BILLING Priority : MANDATORY

Version : 2 Status : UNDER DEVELOPMENT

==========================================================================

Associated patches: (v)IB\*2\*366 <<= must be installed BEFORE `IB\*2\*549'

(v)IB\*2\*516 <<= must be installed BEFORE `IB\*2\*549'

(v)IB\*2\*521 <<= must be installed BEFORE `IB\*2\*549'

(v)IB\*2\*533 <<= must be installed BEFORE `IB\*2\*549'

Subject: EINSURANCE-COMPLIANCE PHASE 3 FY15

Category: ROUTINE

DATA DICTIONARY

ENHANCEMENT

INPUT TEMPLATE

OTHER

Description:

===========

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---------------------------------------------------------------------------------------------------

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REGISTRATION (DG) V. 5.3 DG\*5.3\*916

The patches (IB\*2.0\*549 and DG\*5.3\*916) are being released in the Kernel Installation and Distribution System (KIDS) multi-build distribution as IB DG BUNDLE 1.0.

The purpose of this patch is to meet the requirements of the Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3 project related to Integrated Billing (IB). eInsurance provides Insurance identification and verification which is vital to the success of the Department of Veterans Affairs (VA) revenue collection process. Accurate insurance information is needed to effectively submit claims and collect payments from third-party payers for medical care and services provided to Veterans by the Veterans Health Administration (VHA).

The following features of the IB software will be affected by this project:

1) Electronic Insurance Verification (eIV):

* eIV data extracts and eIV Request Electronic Insurance Inquiry.
  + eIV Appointment extract will include Prescription only coverages.
  + eIV Appointment extract will include Prescription type of plans.
  + eIV Appointment extract will exclude specific types of coverages.
  + eIV Appointment extract will exclude specific types of plans.
  + eIV Request Electronic Insurance Inquiry will allow inquiries for deceased patients, but will not use Date of Death (DOD) as the service date.
* eIV processing and transmission:
  + eIV Auto Update will only update active policies.
  + "IIV EC" HL7 logical link will use a domain name.

2) Modifications to several screens in Integrated Billing:

* Date of Death:
  + When a patient is marked as deceased in Veterans Health Information Systems and Technology Architecture (VistA), their active policies will automatically be termed.
  + Patient Policy information screen will reflect the patient's date of death.
* Security Key:
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Coverage Limitations (action CV) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Annual Benefits (action AB) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Change Plan Info (action PI) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit UR Info (action UI) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Inactivate a Plan (action IP) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Edit Comments (action PC) within the Insurance Company Entry/Edit option on the Insurance Company screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Fast Edit All plan specific information within the Patient Insurance Info View/Edit option on the Patient Insurance screen.
* Process Insurance Buffer option and eIV Response data:
  + Insurance Buffer will no longer allow a user to directly access the eIV Response Report via RR action.
  + Insurance Buffer's expand benefit will include additional eIV Response data.
  + Insurance Buffer's accept entry process will allow acceptance of additional eIV Response data.
  + Insurance Buffer will display all Medicare entries to all users.
* Patient Insurance screen (Patient Insurance Info View Entry/Edit option):
  + Patient Insurance screen will display additional eIV Response data.
  + "Policy Not Billable" prompt will be modified to make it more clear to the user.
* Insurance Company screen (Insurance Company Entry/Edit option):
  + The Expand Benefits action (EB) will display additional eIV Response data.
* Enhance VistA Insurance Capture Buffer(ICB):
  + ICB will not create a new insurance company if the user lacks the proper security key.
  + ICB will not create a new group plan if the user lacks the proper security key or it already exists.
* Enhance VistA Data Dictionary (DD):
  + Create new entry in the file TYPE OF COVERAGE (#355.2).
  + Create new entry in the file TYPE OF PLAN (#355.1).

3) Reports:

* List Plans by Insurance Company report:
  + Added additional filters.
  + Modified the report layout.
* Patients without Medicare Insurance report:
  + Modified user prompts.
  + Added a new filter based on appointment date.
  + Modified the report layout.
* Active Policies with no Effective Date report:
  + Added additional filters.
  + Modified the report layout.
* eIV Auto Update Report (currently known as the eIV Patient Insurance Update Report):
  + Renamed eIV Patient Insurance Update report to eIV Auto Update
  + Report.
  + Updated the user prompts.
  + Modified the report to display only those patient insurance
  + Entries that were updated by eIV Auto Update.
  + Modified the report layout.
* Creation of new Missing Data report:
  + Create new report that allows a user to search for missing data within active insurance companies.
  + Users may search the following fields in the GROUP INSURANCE PLAN file (#355.3) looking for missing data:
    - Group Number (#2.02).
    - Type of Plan (#.09).
    - Plan Standard FTF (#.16).
    - Plan Standard FTF Value (#.17).
    - Electronic Plan Type (#.15).
    - Bank Identification Number (#6.02).
    - Processor Control Number (PCN) (#6.03).
  + Users may search for missing plan coverage limitations that are found in the PLAN COVERAGE LIMITATIONS file (#355.32).

* Modifications to the worklist, Move Subscribers to a Different Plan:
  + Added functionality so that a user may move individual patients instead of an entire group if they desire.
  + Added additional user prompts.

4) Modifications to the Patient Policy Comments:

* Insurance Comments (Patient Insurance Info View Entry/Edit option):
  + Provided ability to capture additional data for patient policy comments.
  + Removed the "Insur. Contact Inf. (IC)" action from the Patient Policy Information screen.
  + Removed the Insurance Comment (last) section from the Patient Policy Information screen.
  + Added new "Group Plan Comment (GC)" action to the Patient Policy Information screen.
  + Added ability for users to view the historical list of patient policy comments.
  + Provided search functionality for historical patient policy comments.

* Insurance Comments (Claims Tracking screens/options):
  + Added new "Pt Policy Comments (PT)" action to claims tracking screens.
  + Added ability for users to view the historical list of patient policy comments.
* Insurance Comments (Third Party Joint Inquiry (TPJI) option):
  + Added new "Pt Policy Comments (PT)" action to TPJI.
  + Added ability for users to view the historical list of patient policy comments.

5) Modifications to the eIV Site Parameters:

* IV Site Parameters:
  + Redesigned user screen.
  + Allows edit functionality of the following data elements:
    - Medicare Payer.
    - HMS Directory.
    - EII Active
  + Displays in view only mode:
    - Retry Flag.
    - Timeout Days.
    - Timeout Mailman Msg.
    - Number Retries.
    - Default Service Type Code.
    - HL7 Maximum Number.
  + Removed the display of the following data elements:
    - Contact Person.
    - Contact's phone number.
    - Contact's email address.
  + Added the following new data elements:
    - Master Switch Realtime.
    - Master Switch Nightly.
  + Removed edit abilities for the data elements:
    - Failure Mailman Msg.
    - Messages Mailgroup.

6) Modification to the existing National Insurance File (NIF) Interface:

* Sending HL7 messages to the NIF:
  + The logic in VistA that allows a query to be sent to the National Insurance File (NIF) will be modified to make sure several additional conditions are satisfied:
    - TRANSMIT ELECTRONICALLY field (#36,3.01) must be "YES-LIVE".
    - TYPE OF COVERAGE field (#36,.13) is being evaluated to ensure that only insurance companies with certain types of coverages are acceptable for transmission.

Patch Components

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Files & Fields Associated:

File Name (#) New/Modified/

Sub-file Name (#) Field Name (Number) Deleted

------------------- --------------------------------- -------------

PATIENT (#2) Modified

INSURANCE TYPE sub-file (#2.312) Modified

POLICY NOT BILLABLE (#3.04) Modified

TRACE NUMBER (#8.03) New

NAME OF INSURED (FX) (#50.01) New

SUBSCRIBER ID (FX) (#50.02) New

GROUP NAME (#51.01) New

GROUP NUMBER (#51.02) New

INSURED DOB (#52.01) New

INSURED SSN (#52.02) New

INSURED SEX (#52.03) New

WHOSE INSURANCE (S) (#52.04) New

PT RELATIONSHIP TO INSURED (#52.05) New

EFFECTIVE DATE (#52.06) New

EXPIRATION DATE (#52.07) New

COORDINATION OF BENEFITS (S) New

(#52.08)

DATE OF DEATH (#52.09) New

CERTIFICATION DATE (#52.1) New

MEMBER ID (#52.11) New

PAYER UPDATED POLICY (#52.12) New

POLICY NUMBER (#52.13) New

SUBSCRIBER ADDRESS LINE 1 (#53.01) New

SUBSCRIBER ADDRESS LINE 2 (#53.02) New

SUBSCRIBER ADDRESS CITY (#53.03) New

SUBSCRIBER ADDRESS STATE (#53.04) New

SUBSCRIBER ADDRESS ZIP (#53.05) New

SUBSCRIBER ADDRESS COUNTRY New

(#53.06)

SUBSCRIBER ADDRESS SUBDIVISION New

(#53.07)

COMMENT - SUBSCRIBER POLICY sub-file (#2.342) Modified

PERSON CONTACTED (#.04) New

CONTACT PHONE # (#.05) New

CALL REFERENCE NUMBER (#.06) New

METHOD OF CONTACT (#.07) New

AUTHORIZATION NUMBER (#.08) New

CONTACT PERSON sub-file (#2.352) New

CONTACT PERSON (#.01) New

COMMUNICATION QUALIFIER #1 (#.02) New

COMMUNICATION QUALIFIER #2 (#.03) New

COMMUNICATION QUALIFIER #3 (#.04) New

COMMUNICATION NUMBER #1 (#1) New

COMMUNICATION NUMBER #2 (#2) New

COMMUNICATION NUMBER #3 (#3) New

INSURANCE COMPANY (#36) Modified

TYPE OF COVERAGE (#.13) Modified

TRANSMIT ELECTRONICALLY (#3.01) Modified

IB SITE PARAMETERS (#350.9) Modified

CONTACT PERSON (#51.16) Modified

270 MASTER SWITCH REALTIME (#51.27) New

270 MASTER SWITCH NIGHTLY (#51.28) New

DAILY NIF STATUS CHECK TIME New

(#51.29)

Bulletins Associated:

New/Modified/

Bulletin Name Deleted

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N/A

Dialogs Associated:

New/Modified/

Dialog Name Deleted

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N/A

Forms Associated:

New/Modified/

Form Name File Name (Number) Deleted

--------------- ------------------------- ------------------

N/A

Functions Associated:

New/Modified/

Function Name Deleted

------------------- ------------------

N/A

HL Logical Link:

New/Modified/

HL Logical Name Deleted

---------------------- ------------------

N/A

HL7 Application Parameters:

New/Modified/

HL7 Parameter Name Deleted

--------------------------- ------------------

N/A

HLO Application Registry:

New/Modified/

HLO Registry Name Deleted

------------------------- ------------------

N/A

Help Frames Associated:

New/Modified/

Help Frame Name Deleted

---------------------- ------------------

N/A

Mail Groups Associated:

New/Modified/

Mail Group Name Deleted

---------------------- ------------------

N/A

Options Associated:

New/Modified/

Option Name Type Deleted

---------------- ------ ------------------

IBCN INSURANCE MGMT MENU menu Modified

IBCN MISSING DATA run routine New

IBCNE EIV UPDATE REPORT run routine Modified

Parameter Definitions:

New/Modified/

Parameter Name Deleted

-------------------- ------------------

N/A

Parameter Template:

New/Modified/

Template Name Deleted

------------------- ------------------

N/A

Protocols Associated:

New/Modified/

Protocol Name Deleted

------------------ ------------------

IBCN INS CO ACTIVE MENU New

IBCN INS CO ACTIVE UNSELECT New

IBCN INS CO MENU New

IBCN INS CO NEW SEARCH New

IBCN INS CO SELECT New

IBCN INS CO SHOW SEL New

IBCN INS CO UNSELECT New

IBCN SUBSCRIBER ACTIVE MENU New

IBCN SUBSCRIBER ACTIVE UNSELECT New

IBCN SUBSCRIBER MENU New

IBCN SUBSCRIBER SELECT New

IBCN SUBSCRIBER SHOW SEL New

IBCN SUBSCRIBER SORT LIST New

IBCN SUBSCRIBER UNSELECT New

IBCNB ENTRY EDIT ALL Attach to menu

IBCNB ENTRY EDIT GROUP Attach to menu

IBCNB ENTRY EDIT INSURANCE Attach to menu

IBCNB ENTRY EDIT POLICY Attach to menu

IBCNB ENTRY ESCALATE Attach to menu

IBCNB ENTRY SCREEN MENU Modified

IBCNB FAST EXIT Attach to menu

IBCNCH ADD COMMENT New

IBCNCH COMMENT HISTORY EXPAND New

IBCNCH COMMENT HISTORY EXPAND VIEW New

IBCNCH COMMENT HISTORY MENU New

IBCNCH COMMENT HISTORY SEARCH New

IBCNCH COMMENT HISTORY VIEW New

IBCNCH DELETE COMMENT New

IBCNCH DELETE COMMENT EXPAND New

IBCNCH EDIT COMMENT New

IBCNCH EDIT COMMENT EXPAND New

IBCNCH EXPAND COMMENT New

IBCNCH EXPAND COMMENT VIEW New

IBCNCH PREVIOUS COMMENT New

IBCNCH SEARCH LIST New

IBCNCH SEARCH LIST EXPAND New

IBCNCH SEARCH NEXT New

IBCNE VP VIEW EXP ELIG BEN SCREEN Attach to menu

IBCNS EXIT Attach to menu

IBCNSJ CHANGE PLAN Attach to menu

IBCNSJ EDIT COVERAGE LIMITS Attach to menu

IBCNSJ INACTIVATE PLAN Attach to menu

IBCNSP ADD GROUP COMMENT New

IBCNSP PATIENT POLICY COMMENTS ADD/EDIT New

IBCNSP PATIENT POLICY COMMENTS VIEW New

IBCNSP POLICY MENU Modified

IBCNSP SUBSCRIBER UPDATE Attach to menu

IBCNSP UR INFO Attach to menu

IBCNSP VERIFY COVERAGE Attach to menu

IBCNSV POLICY MENU Modified

IBJ EXIT Attach to menu

IBJP IIV GENERAL EDIT Attach to menu

IBJP INS VER MENU Modified

IBJT ACTIVE LIST SCREEN SKIP Attach to menu

IBJT PATIENT POLICY COMMENTS VIEW New

IBJT SHORT MENU Modified

VALM BLANK 1 Attach to menu

VALM BLANK 2 Attach to menu

Remote Procedures Associated:

New/Modified/

Remote Procedure Name Deleted

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N/A

Security Keys Associated:

New/Modified/

Security Key Name Deleted

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N/A

Templates, Input Associated:

New/Modified/

Template Name Type File Name (Number) Deleted

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IBCNE GENERAL Input IB SITE PARAMETERS (#350.9) Modified

PARAMETER EDIT

Templates, List Associated:

New/Modified/

Template Name Type Deleted

-------------------- ------- ------------------

IBCN INS CO List New

SELECTED

IBCN INS CO List New

SELECTOR

IBCN SUBSCRIBER List New

SELECTED

IBCN SUBSCRIBER List New

SELECTOR

IBCNCH POL List New

COMMENT EXPAND

VIEW

IBCNCH POLICY List New

COMMENT EXPAND

IBCNCH POLICY List New

COMMENT HISTORY

IBCNCH POLICY List New

COMMENT SEARCH

IBCNCH POLICY List New

COMMENT VIEW

IBJP IIV SITE List Modified

PARAMETERS

Templates, Print Associated:

New/Modified/

Template Name Type File Name (Number) Deleted

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N/A

Templates, Sort Associated:

New/Modified/

Template Name Type File Name (Number) Deleted

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N/A

Additional Information:

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N/A

New Service Requests (NSRs)

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NSR 20140413 - Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

Patient Safety Issues (PSIs)

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N/A

Remedy Ticket(s) & Overview

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N/A

1. <Remedy Ticket #> <Subject>

Problem:

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Resolution:

-------------

Test Sites:

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TBD

Documentation Retrieval Instructions

---------------------------------------------

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Title File Name FTP Mode

---------------------------------------------------------------------------------------------------------------

Release Notes/Installation Guide TBD Binary

Technical/Security Manual TBD Binary

Updated User Guide TBD Binary

## Pre/Post Installation Overview

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 and there are no Integrated Billing users on the system.

Do not delete the post install routine "IBY549PO" after the install has been completed as a task has been queued to run in the background and it needs this routine to complete.

Pre-Installation Instructions

-------------------------

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

\* You should install this patch during non-peak hours, when no \*

\* Integrated Billing users are on the system. \*

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

\*\*\*\*There are no options to disable.

Install Time: Less than 10 minutes.

## Installation Instructions

1. OBTAIN PATCHES

--------------

Obtain the host file IB\_DG\_BUNDLE\_1\_0.KID, which contains the following patches:

IB\*2.0\*549

DG\*5.3\*916

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

download.vista.domain.ext

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.ftpserver.domain.ext

Hines ftp.ftpserve.domain.ext

Salt Lake City ftp.ftpsrv.domain.ext

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

2. START UP KIDS

-------------

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

Edits and Distribution ...

Utilities ...

Installation ...

Select Kernel Installation & Distribution System Option: Installation

----

Load a Distribution

Print Transport Global

Compare Transport Global to Current System

Verify Checksums in Transport Global

Install Package(s)

Restart Install of Package(s)

Unload a Distribution

Backup a Transport Global

Select Installation Option:

3. LOAD 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 IB\_DG\_BUNDLE\_1\_0.KID (e.g., SYS$SYSDEVICE:[ANONYMOUS]IB\_DG\_BUNDLE\_1\_0.KID).

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

The following will display:

Loading Distribution...

IB DG BUNDLE 1.0

IB\*2.0\*549

DG\*5.3\*916

Use INSTALL NAME: IB DG BUNDLE 1.0 to install this distribution.

4. RUN OPTIONAL INSTALLATION OPTIONS FOR MULTI-BUILD

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From the Installation menu, you may select to use the following options (when prompted for the INSTALL NAME, enter IB DG BUNDLE 1.0):

a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as data dictionaries or templates.

b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, data dictionaries, templates, etc.).

c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

5. INSTALL MULTI-BUILD

-------------------

This is the step to start the installation of this KIDS patch. This will need to be run for the IB DG BUNDLE 1.0.

a. Choose the Install Package(s) option to start the patch install.

b. When prompted 'Select INSTALL NAME:', enter IB DG BUNDLE 1.0.

6. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', enter NO.

7. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//', enter NO.

8. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', enter NO.

9. When prompted "Device: HOME//", respond with the correct device but do \* NOT \* queue this install.

If prompted "Delay Install (Minutes): (0 - 60): 0// respond 0.

Post-Installation Instructions

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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:

;;2.0;INTEGRATED BILLING;\*\*[Patch List]\*\*;21-MAR-94;Build 16

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

Routine Name: IBAMTC

Before: B26484499 After: B28258133 \*\*34,52,70,93,100,118,115,132,

150,153,137,176,215,275,321,

312,457,519,549\*\*

Routine Name: IBCEMMR

Before: B48738467 After:B191921639 \*\*155,366,549\*\*

Routine Name: IBCMDT

Before: n/a After: B32671051 \*\*549\*\*

Routine Name: IBCMDT1

Before: n/a After: B33876386 \*\*549\*\*

Routine Name: IBCMDT2

Before: n/a After: B21475010 \*\*549\*\*

Routine Name: IBCMDT3

Before: n/a After: B8917692 \*\*549\*\*

Routine Name: IBCNBCD

Before: B99276499 After:B111563921 \*\*82,251,361,371,416,438,452,

497,549\*\*

Routine Name: IBCNBLL

Before:B139954762 After:B141460895 \*\*82,149,153,183,184,271,345,

416,438,435,506,519,549\*\*

Routine Name: IBCNCH

Before: n/a After: B83079378 \*\*549\*\*

Routine Name: IBCNCH2

Before: n/a After: B48977156 \*\*549\*\*

Routine Name: IBCNCH3

Before: n/a After: B89037161 \*\*549\*\*

Routine Name: IBCNEDE1

Before: B44623085 After: B45606452 \*\*184,271,416,438,435,467,497,549\*\*

Routine Name: IBCNEDE2

Before: B63879348 After: B81876685 \*\*184,271,249,345,416,438,506,549\*\*

Routine Name: IBCNEDE5

Before: B28666402 After: B29541392 \*\*184,271,416,497,549\*\*

Routine Name: IBCNEDEP

Before: B88960339 After: B90995823 \*\*184,271,300,416,438,506,533,549\*\*

Routine Name: IBCNEDST

Before: B47395616 After: B57416353 \*\*497,506,549\*\*

Routine Name: IBCNEHL1

Before:B215626728 After:B175641722 \*\*300,345,416,444,438,497,506,549\*\*

Routine Name: IBCNEHL5

Before: B11250093 After: B64113696 \*\*497,549\*\*

Routine Name: IBCNEHLM

Before: B28096778 After: B23803518 \*\*184,251,300,416,438,497,506,549\*\*

Routine Name: IBCNEHLT

Before: B80145618 After: B88780430 \*\*184,251,271,300,416,438,506,549\*\*

Routine Name: IBCNERP1

Before: B79692188 After: B79684672 \*\*184,271,416,549\*\*

Routine Name: IBCNERPF

Before: B16361185 After: B29783925 \*\*416,549\*\*

Routine Name: IBCNERPG

Before: B15534927 After: B48380429 \*\*416,549\*\*

Routine Name: IBCNERPH

Before: B19008482 After: B33731929 \*\*416,549\*\*

Routine Name: IBCNERTQ

Before: B44184624 After: B45885060 \*\*438,467,497,549\*\*

Routine Name: IBCNES3

Before: B25873283 After: B71003083 \*\*497,549\*\*

Routine Name: IBCNEUT7

Before: B3520436 After: B63906501 \*\*184,549\*\*

Routine Name: IBCNHHLO

Before: B11459482 After: B16107264 \*\*519,521,549\*\*

Routine Name: IBCNHUT1

Before: B19687028 After: B32382799 \*\*519,521,549\*\*

Routine Name: IBCNHUT2

Before: B47011114 After: B83617962 \*\*519,549\*\*

Routine Name: IBCNICB

Before:B106011881 After:B112538945 \*\*413,416,549\*\*

Routine Name: IBCNILK

Before: n/a After:B138829265 \*\*549\*\*

Routine Name: IBCNSJ1

Before: B20445823 After: B22191790 \*\*28,549\*\*

Routine Name: IBCNSJ5

Before: B19961411 After: B31414566 \*\*43,516,549\*\*

Routine Name: IBCNSM1

Before: B21887577 After: B24280552 \*\*28,56,549\*\*

Routine Name: IBCNSP

Before: B49297563 After: B75647043 \*\*6,28,43,52,85,251,363,371,

416,497,516,549\*\*

Routine Name: IBCNSP1

Before: B60114361 After: B78730211 \*\*6,28,40,43,52,85,103,361,371,

377,497,549\*\*

Routine Name: IBCNSP11

Before: B11721673 After: B14955715 \*\*28,43,85,103,137,251,399,516,549\*\*

Routine Name: IBCNSP3

Before: B38854605 After: B38222393 \*\*28,52,85,251,371,497,549\*\*

Routine Name: IBCNSU2

Before: B19732446 After: B23662476 \*\*28,62,497,549\*\*

Routine Name: IBCNSUR

Before: B24287477 After: B24782605 \*\*103,276,506,516,549\*\*

Routine Name: IBCNSUR1

Before: B57694333 After:B149466254 \*\*103,225,276,516,549\*\*

Routine Name: IBCNSUR4

Before: n/a After:B153455889 \*\*549\*\*

Routine Name: IBCOMA

Before: B21266517 After: B56031918 \*\*103,549\*\*

Routine Name: IBCOMA1

Before: B34536686 After: B64091016 \*\*103,516,549\*\*

Routine Name: IBCOPP

Before: B14149734 After: B22943314 \*\*28,62,549\*\*

Routine Name: IBCOPP1

Before: B9186592 After: B19705039 \*\*28,549\*\*

Routine Name: IBCOPP2

Before: B20749250 After: B65219192 \*\*28,62,93,516,549\*\*

Routine Name: IBCOPP3

Before: B10453963 After: B36558491 \*\*28,516,549\*\*

Routine Name: IBJPI

Before: B19548396 After: B41077051 \*\*184,271,316,416,438,479,506,549\*\*

Routine Name: IBY549PO

Before: n/a After: B58762328 \*\*549\*\*

Routine Name: IBY549PR

Before: n/a After: B3913226 \*\*549\*\*

Routine list of preceding patches: 56, 366, 516, 521, 533

# Backout and Rollback Procedures

## Overview of Backout and Rollback Procedures

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

## Backout Procedure

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

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

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

* Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.

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

## Rollback Procedure

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

Please contact the product development team for assistance if needed.

# Enhancements

## Technical Modifications

The following features of the IB software will be affected by this project.

### Electronic Insurance Verification (eIV)

The following modifications have been made to eIV:

* eIV data extracts and eIV Request Electronic Insurance Inquiry.
  + eIV Appointment extract will include Prescription only coverages.
  + eIV Appointment extract will include Prescription type of plans.
  + eIV Appointment extract will exclude specific types of coverages.
  + eIV Appointment extract will exclude specific types of plans.
  + eIV Request Electronic Insurance Inquiry will allow inquiries for deceased patients, but will not use Date of Death (DOD) as the service date.
* eIV processing and transmission:
  + eIV Auto Update will only update active policies.
* "IIV EC" HL7 logical link will use a domain name.

### Integrated Billing Screen Modifications

This project made modifications to several screens in Integrated Billing:

* Date of Death:
  + When a patient is marked as deceased in Veterans Health Information Systems and Technology Architecture (VistA), their active policies will automatically be termed.
* Patient Policy information screen will reflect the patient's date of death.
* Security Key:
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Coverage Limitations (action CV) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Annual Benefits (action AB) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit Change Plan Info (action PI) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to edit UR Info (action UI) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Inactivate a Plan (action IP) within:
    - The Insurance Company Entry/Edit option on the Insurance Company screen.
    - The Patient Insurance Info View/Edit option on the Patient Insurance screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Edit Comments (action PC) within the Insurance Company Entry/Edit option on the Insurance Company screen.
  + Existing "IB GROUP PLAN EDIT" security key is required to Fast Edit All plan specific information within the Patient Insurance Info View/Edit option on the Patient Insurance screen.
* Process Insurance Buffer option and eIV Response data:
  + Insurance Buffer will no longer allow a user to directly access the eIV Response Report via RR action.
  + Insurance Buffer's expand benefit will include additional eIV Response data.
  + Insurance Buffer's accept entry process will allow acceptance of additional eIV Response data.
  + Insurance Buffer will display all Medicare entries to all users.
* Patient Insurance screen (Patient Insurance Info View Entry/Edit option):
  + Patient Insurance screen will display additional eIV Response data.
  + "Policy Not Billable" prompt will be modified to make it more clear to the user.
* Insurance Company screen (Insurance Company Entry/Edit option):
  + The Expand Benefits action (EB) will display additional eIV Response data.
* Enhance VistA Insurance Capture Buffer(ICB):
  + ICB will not create a new insurance company if the user lacks the proper security key.
  + ICB will not create a new group plan if the user lacks the proper security key or it already exists.
* Enhance VistA Data Dictionary (DD):
  + Create new entry in the file TYPE OF COVERAGE (#355.2).
  + Create new entry in the file TYPE OF PLAN (#355.1).

### Reports

This project created or modified the following reports:

* List Plans by Insurance Company report:
  + Added additional filters.
  + Modified the report layout.
* Patients without Medicare Insurance report:
  + Modified user prompts.
  + Added a new filter based on appointment date.
  + Modified the report layout.
* Active Policies with no Effective Date report:
  + Added additional filters.
  + Modified the report layout.
* eIV Auto Update Report (currently known as the eIV Patient Insurance Update Report):
  + Renamed eIV Patient Insurance Update report to eIV Auto Update Report.
  + Updated the user prompts.
  + Modified the report to display only those patient insurance entries that were updated by eIV Auto Update.
  + Modified the report layout.
* Creation of new Missing Data report:
  + Create new report that allows a user to search for missing data within active insurance companies.
  + Users may search the following fields in the GROUP INSURANCE PLAN file (#355.3) looking for missing data:
    - Group Number (#2.02).
    - Type of Plan (#.09).
    - Plan Standard FTF (#.16).
    - Plan Standard FTF Value (#.17).
    - Electronic Plan Type (#.15).
    - Bank Identification Number (#6.02).
    - Processor Control Number (PCN) (#6.03).
  + Users may search for missing plan coverage limitations that are found in the PLAN COVERAGE LIMITATIONS file (#355.32).
* Modifications to the worklist, Move Subscribers to a Different Plan:
  + Added functionality so that a user may move individual patients instead of an entire group if they desire.
  + Added additional user prompts.

### Patient Policy Comment Modifications

The following modifications have been made to Patient Policy Comments:

* Insurance Comments (Patient Insurance Info View Entry/Edit option):
  + Provided ability to capture additional data for patient policy comments.
  + Removed the "Insur. Contact Inf. (IC)" action from the Patient Policy Information screen.
  + Removed the Insurance Comment (last) section from the Patient Policy Information screen.
  + Added new "Group Plan Comment (GC)" action to the Patient Policy Information screen.
  + Added ability for users to view the historical list of patient policy comments.
  + Provided search functionality for historical patient policy comments.
* Insurance Comments (Claims Tracking screens/options):
  + Added new "Pt Policy Comments (PT)" action to claims tracking screens.
  + Added ability for users to view the historical list of patient policy comments.
* Insurance Comments (Third Party Joint Inquiry (TPJI) option):
  + Added new "Pt Policy Comments (PT)" action to TPJI.
  + Added ability for users to view the historical list of patient policy comments.

### eIV Site Parameters

The following modifications have been made to eIV Site Parameters:

* IV Site Parameters:
  + Redesigned user screen.
  + Allows edit functionality of the following data elements:
    - Medicare Payer.
    - HMS Directory.
    - EII Active
  + Displays in view only mode:
    - Retry Flag.
    - Timeout Days.
    - Timeout Mailman Msg.
    - Number Retries.
    - Default Service Type Code.
    - HL7 Maximum Number.
  + Removed the display of the following data elements:
    - Contact Person.
    - Contact's phone number.
    - Contact's email address.
  + Added the following new data elements:
    - Master Switch Realtime.
    - Master Switch Nightly.
  + Removed edit abilities for the data elements:
    - Failure Mailman Msg.
    - Messages Mailgroup.

### National Insurance File Interface Modifications

The following modifications have been made to the National Insurance File Interface:

* Sending HL7 messages to the NIF:
  + The logic in VistA that allows a query to be sent to the National Insurance File (NIF) will be modified to make sure several additional conditions are satisfied:
    - TRANSMIT ELECTRONICALLY field (#36,3.01) must be "YES-LIVE".
    - TYPE OF COVERAGE field (#36,.13) is being evaluated to ensure that only insurance companies with certain types of coverages are acceptable for transmission.

## Issue Resolutions

### New Service Requests (NSRs)

This patch addresses the following New Service Request (NSR):

NSR 20140413 - Medical Care Collection Fund (MCCF) eInsurance Compliance Phase 3

### Remedy Tickets

There are no Remedy tickets associated with this patch.