

Health Eligibility Case Management System (HECMS)

Release Notes



Enrollment System Redesign (ESR)

Version 2.5

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Revision History

Date	Version	Description	Project Manager	Author
2/6/2012	2.5	Updated UM version in the <i>Related Documents</i> section. Removed listed capability to add Financial and Military Service information as part of the registration process.	Glenda Miller	Tom Hamilton
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12/14/10		Grayed out <i>Handbook Active</i> System Parameter, <i>Handbook Status</i> indicator and marked as (Future Rel.). Updated cover and footer date. Updated VOA definition to remove My Health _e Vet references.	Jennifer Freese	Tom Hamilton
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7/2/10		Added HECMS 3.2 update to the <i>Introduction/ Overview</i> section. Added General Counsel’s Ruling updates in the <i>Financials/Adjudication</i> section under <i>User Release Notes</i> ,	Brian Morgan	Tom Hamilton
4/26/10		Removed Draft indicators and checked accuracy for uploading final copy to VDL.	Brian Morgan	Tom Hamilton
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3/25/10		Added new Veteran Merge Search info in <i>Added/Updated Fields/Screens</i> section per CCR 10127.	Brian Morgan	Tom Hamilton
2/1/10		Added the following HL7 updates: Pseudo SSN Reason - ZPD-34 Amount Contributed to Child (Only on dependent child) - ZIR-4 Insurance Address Line 3 - IN1-5.8	Brian Morgan	Tom Hamilton
9/29/09		Added 2 Rules for new req. CR 2530 to <i>Date of Birth</i> field under <i>Standardizing Date Checks</i> section.	Sookie Spence	Tom Hamilton

Date	Version	Description	Project Manager	Author
9/22/09 – 9/23/09		Updated VOA-dependent field designators based on meeting with developer/SQA.	Sookie Spence	Tom Hamilton
9/11/09		Added to the 3.1/VOA Added/Updated Fields/Screens section.	Sookie Spence	Tom Hamilton
9/1/09		Updated HECMS main page and added additional 3.1/VOA functionality notes.	Sookie Spence	Tom Hamilton
12/18/07		Create Initial Draft Release Notes document	Gerry Lowe	Tom Hamilton
9/17/07		Updated HECMS main page and added additional 3.1 functionality notes.	Sookie Spence	Tom Hamilton

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Introduction

Overview

HECMS (Health Eligibility Case Management System) **V3.0** was the HealthVet replacement system for the product known as HEC (Health Eligibility Center) Legacy. It was both a re-host of HEC Legacy and in some instances (use cases/features), a re-engineering. HECMS allows staff at the HEC to work more efficiently and determine patient eligibility in a more timely manner. Messaging with the VAMC (Department of Veterans Affairs Medical Center) allows updates to the enterprise enrollment system to be shared with the field.

The purpose of the Enrollment System Redesign (ESR) 3.1 project (a.k.a. HECMS **V3.1**) was to implement minor enhancements and some high-priority change requests to the ESR as requested by the customer and stakeholders, some of which were de-scoped from ESR 3.0. These enhancements were developed on both the VistA Registration, Eligibility and Enrollment (REE) Legacy and ESR systems. The idea was to ensure the VAMCs maintained their ability to make initial enrollment and eligibility determinations while supporting the replacement and enhancements of the HEC Legacy Software Application.

President Bush established a Task Force for returning Global War on Terror (GWOT) heroes which resulted in enhancements which improved the delivery of Federal services and benefits to GWOT service members and veterans. Among the recommendations associated with the Task Force was to focus on enhancing the delivery of services and information to GWOT service members and veterans within existing authority and resource levels.

To satisfy the *Program Management Accountability System* (PMAS) initiative to provide more frequent software releases with reduced functionality, ESR **V3.1** was released separate from the Veterans Online Application (VOA) package, which will be released at a later date. The unpopulated VOA fields are identified by adding “**VOA**” in parenthesis next to the respective field names throughout the User Manual. These placeholder fields will not be populated until VOA is released.

ESR **V3.2** added the General Counsel’s (GC) Ruling on changes to the Geographic Means Test Threshold (GMTT). The GC ruling dictates that people with very low income who live where the GMTT is less than the Means Test Threshold (MTT) and whose net income is less than the GMTT, yet their net income plus assets is greater than the Net Worth Threshold, be placed in Priority Group (PG) 7.

ESR **V3.3** added a number of Enhancements, some of which could be seen by the users and some of which were transparent.

The main areas in which some 3.3 enhancements were made are:

- Military Service Data Sharing (MSDS), Phase I

- VBA Pension Data Sharing
- E&E Web Services Phase II
- Priority Group Relaxation % Phase II
- Patient Benefits Handbook Phase I
- Remove Unnecessary Data Consistency Checks
- Duplicate Merge Tool Enhancement

ESR **V3.4** added the following Military Service Data Sharing (MSDS) capabilities.

- A manual query to the Beneficiary Identification Records Locator System (BIRLS) and VA/DoD Identity Repository (VADIR) via the MSDS Broker can be initiated from the *Military Service* page.
- The **MSDS Query Status** is displayed on the *Current Eligibility* page.
- The Veteran's record is updated if the incoming data received from BIRLS and VADIR is more favorable for the veteran.
- **Medal of Honor Indicator** data is stored and displayed on the *Military Service* page.
- When new Military Service Episode (MSE) or Operation Enduring Freedom/Operation Iraqi Freedom (OEF/OIF) data is received from a site, an MSDS Broker query is triggered.
- HEC and Broker data is used rather than site data to determine the **Veteran Indicator**, calculate the **Combat Veteran End Date**, and determine the veteran's **Period of Service**.
- MSE data is shared with the sites (VistA).

ESR **V3.5** added the following additional MSDS capabilities.

- Activations from VADIR are received and processed into ESR Military Service Episodes (MSE).
- The **Combat Veteran End Date** computation was modified to allow a recalculation to an earlier date based on a user edit of the Military Service and/or Combat Service data.
- ESR accepts precise dates from the Broker when ESR has imprecise MSE dates on record.
- ESR does not perform a query of the MSDS Broker for persons with null/missing identity traits.
- Additional choices for **Discharge Type** on the *Current Military Service* screen are available. They are: 1) Honorable for VA Purposes (**Honorable-VA**) and, 2) Dishonorable for VA Purposes (**Dishonorable-VA**).
- Incoming BIRLS data was modified to map *Branch of Service* values for *Air National Guard (ANG)* and *Army National Guard (ARNG)* to **Air Force** and **Army** in ESR, respectively, and also set the **Service Component** field to **Activated National Guard**.
- If the Broker fails to create an MSE record, ESR creates a HEC-owned MSE from the site data.

ESR **V3.5** added the following Public Law (PL111-163) requirement.

- PL111-163 provided additional benefits for Catastrophically Disabled Veterans by eliminating the Means Test and Rx Copay test obligation. A one-time 640K letter was sent to all Catastrophically Disabled veterans to notify them of the additional benefit. Depending on their eligibilities, some Veterans in Priority Groups 1, 2, 3, or 4 are required to complete an Rx Co-pay or Means Test. For these Veterans who had not already been notified they were now exempt from the Rx Co-Pay or Means Test, a 640K letter was also sent.

ESR V3.5 added the following Add a Person capabilities.

- Search to add a person (*Search and Add New Person*) – This functionality allows users to perform searches for a registrant by any combination of criteria and enables the user to register (Add) a new person to the HECMS system or update a person who is “In Process”.
- Save person in-process (*Save in Process*) – This option allows users to save registrant records in a state of “In Process” so they can be returned to for completion at a later time.
- Cancel a registration (*Cancel Registration*) – This option allows users to cancel a registration that is in progress, or a registration that has been resumed from being “Saved in Process”.
- As part of the Add a Person registration process,
 - enter Demographics information
 - enter Eligibility information
 - enter Enrollment information
- Send a query to VBA when new person is added to ESR.
- Transmit registrant data using HL7 messaging.
- Run new reports (EED 19) to see person registration statuses.

ESR V3.5 added the following Preferred Facility capabilities.

- On the *Demographics/Personal* page, the ***Preferred Facility*** field is only editable when an active Primary Care Provider (PCP) is unavailable. The field next to it is the ***Preferred Facility Source*** field, which is the source of the Preferred Facility selection. It is not user-selectable but is automatically populated based on the source of the data.
- The Veteran’s Preferred Facility is determined by communicating with an outside (of ESR) source (Corporate Data Warehouse {CDW}).
- New *Missing Preferred Facility* report (EED 20) displays which Veterans have no Preferred Facility.

ESR V3.5 added the following Veteran Benefits Handbook functionality.

- Twenty-four new triggers were added for ESR to generate Veteran Benefits Handbooks.
- Users may display a published Veteran Benefits Handbook through a link on the *Veteran Overview* screen.
- Triggers for handbooks or inserts will only fire if the Preferred Facility is Dayton, enabling a controlled pilot project to be completed.
- Data is shared with the Content Management System (CMS) Vendor allowing the creation and mailing of patient specific Handbooks to individual Veterans.

ESR V3.6 adds the following E&E Web Service/T-Pharm enhancements.

- In support of the FSC Fee and Dialysis groups, sixteen additional data fields were added to the “Get EE Summary” response, plus the ability to pass a date-of-service parameter on a second request.
- A new service request will return historical data based on a Date of Service
- A new Eligibility Determination request that returns “Eligible” or “Not Eligible” based on the Enrollment Status
- The Eligibility Determination Service (EDS) was added in support of the Third-Party Pharmacy (T-Pharm) effort. ESR will receive an Integration Control Number (ICN),

determine the Eligibility Status based on the business rules, and return the value to the requestor.

ESR V3.6 adds the following Public Law (PL111-163) requirement.

- Determine Enrollment now calculates Medal Of Honor (MOH) recipients to Priority Group 3 if no other eligibilities exist that would allow a higher priority group.
- The ***Medal of Honor Indicator*** data stored and displayed on the *Military Service* page is now editable.

ESR V3.6 adds additional Veteran Benefits Handbook functionality.

- A new *HandBook Batch Request* (Add) screen has been added to provide the user with the ability to add a batch request for a *Veterans Benefit Handbook* containing the Veteran's eligibility and benefit information, to be mailed to the Veteran.
- A new **Default Handbook Batch Release Control Number** *System Parameter* was added for changing the release control number to be used with a Handbook Batch Release.
- A new **Handbook Rollout Over** *System Parameter* was added for turning the new enrollment triggers on and off.
- A new **Handbook Active** *System Parameter* was added to activate "trigger" events that prompt the sending of Handbook communications to the CMS.

ESR V3.6 adds additional VBA Pension Data Sharing functionality between VistA and ESR.

- A new **VBA Data Sharing Indicator** *System Parameter* was added for activating the new ZE2 segment (VistA) for sharing VBA Pension Data to/from VistA sites.
- VBA Pension data is now shared with VistA sites.
- Eligibility for Dental benefits is now shared with VistA sites.

ESR V3.6 adds the following MSDS enhancements.

- Automatic determination of OEF/OIF combat episodes using military pay and deployment records.
- Close and remove unwanted work items created from MSDS broker data processing.
- Ignore combat pay record from VADIR/BIRLS if there is no Combat Pay End Date.

Purpose of this Manual

The purpose of this Release Notes document is to provide high-level user and technical information about enhancements to enrollment-related functionality in the ESR system.

Related Documents

- [ESR 3.6 \(HECMS\) User Manual](#) Written version of the ESR V3.6 Online Help System (manual v2.7)
- [ESR 3.6 \(HECMS\) Installation Guide](#) Updated ESR V3.6 Installation Guide (manual v2.1)

- [ESR 3.6 \(HECMS\) Security Guide](#) Updated ESR V3.6 Security Guide (manual v2.1)
- [ESR 3.6 \(HECMS\) Systems Management Guide](#) Updated ESR V3.6 Systems Management Guide (manual v2.1)
- [ESR 3.6 \(HECMS\) Developers Guide](#) ESR V3.6 (HECMS) Developers Guide (manual v2.1)

Remedy Tickets Resolved

- **333868** – *Enrollment In-Process Patients Received “Invalid Date” Errors*
When processing Medicare insurance (IN1) segment into ESR, if the effective date and/or expiration date are imprecise, ESR fails to upload with an 'invalid date' - no date on the Z07 uploads. For private insurance, this is not an issue.

Corrected by CCR **9568** - Changed Medicare part A and B effective date to be imprecise.

Defect Related Code CRs Resolved

- CodeCR10673 - To Allow the veteran's and spouse's retirement dates to be imprecise.
- 10709 - CV Eligibility not using Combat Pay End Date
- 11257 - UI is holding over data from a previous person *[this was fixed in an earlier version but was found to be broken again in 3.5]*
- 11258 - Data validations are not happening on Edit Eligibility screen
- Maint_CodeCR11231 - Production: Record with a Zip = 50156 was unable to determine GMT Thrhld (incorrect MSA) [will be fixed in Production by SDS before 3.6 UFT]
- 11229 - ESR builds Z05 with RF1 with CAD last change date but no Confidential Address
- 10727 - Zip Code Lookup fails on multiple cities (see also TBD_CodeCR10449)
- 10725 - "Orphan" PENSION records found in Production database (ADRP)

Acronyms and Definitions

Acronyms

Acronym	Description
ADR	Administrative Data Repository
ADT	Admissions, Discharges, Transfers
BIRLS	Beneficiary Identification Records Locator System
CBO	Chief Business Office
CDW	Corporate Data Warehouse
CEV	Centralized Eligibility Verification
CMS	Content Management System
CV	Combat Veteran
E&E	Eligibility and Enrollment
EDS	Eligibility Determination Service
EGT	Enrollment Group Threshold
ESR	Enrollment System Redesign
FSC	Financial Services Center
GMTT	Geographic Means Test Threshold
GWOT	Global War on Terror
HEC	Health Eligibility Center
HECMS	Health Eligibility Case Management System
ICN	Integration Control Number
IVM	Income Verification Match
MSDS	Military Service Data Sharing
MSE	Military Service Episode
MT	Means Test
NSC	Non service-connected
OEF/OIF	Operation Enduring Freedom/Operation Iraqi Freedom
PCP	Primary Care Provider
PIMS	Patient Information Management System
REE	Registration, Eligibility and Enrollment

Acronym	Description
SC	Service-connected
SDS	Standard Data Service
TBD	To Be Determined
T-Pharm	Third-Party Pharmacy
UFT	User Functional Test
UI	User Interface
VA	Veterans Administration
VADIR	VA/DoD Identity Repository
VAMC	Department of Veterans Affairs Medical Center
VBA	Veterans Benefit Administration
VistA	Veterans Health Information Systems and Technology Architecture
VHA	Veterans Health Administration
VOA	Veterans Online Application

Definitions

Term	Definition
BIRLS	The Beneficiary Identification Records Locator System (BIRLS) is a Department of Veterans Affairs (VA) Veterans Benefits Administration (VBA) database containing records of all beneficiaries, including Veterans whose survivors applied for death benefits. In addition to these applications for VA benefits, sources of data include Veterans discharged from the military service since March 1973, MOH recipients, and service members with accounts for VA education benefits.
Disenrollment	Voluntary request from veteran to discontinue enrollment in the VA Health Care system
Geographic Means Test (GMT) Thresholds	a.k.a. HUD Indices. Geographical income level thresholds set yearly by the U.S. Department of Housing and Urban Development (HUD). Recognizing that the cost of living can vary significantly from one geographic area to another, Congress enacted legislation adding income thresholds based upon geographic locations (GMT thresholds) to the existing VA National Income Thresholds for financial assessment purposes. This assists lower-income veterans who live in high-cost areas by providing an enhanced enrollment priority (Priority Group 7) and reducing the amount of their inpatient copay by 80% for treatment of nonservice-connected conditions. The copay reduction applies only to inpatient services. Outpatient services, long-term care, as well as medication copays, are not affected by the VA National Geographic Income Thresholds.
Health Eligibility Center (HEC)	The HEC serves as the National Service Center for registration, enrollment and eligibility activities and serves as the business owner for administrative information systems supporting the delivery of VA health care benefits. The HEC achieves VA's Gold Standard of honoring America's veterans by providing accurate and timely health care eligibility and enrollment determinations and accurate, responsive and respectful customer service. The HEC supports VA's health care delivery system by providing centralized eligibility verification and enrollment processing services. The HEC determines veteran's health eligibility and facilitates the process by providing guidance to the field through training, and collaborates with Chief Business Office (CBO) Policy and other administrative offices on the implementation of policy.
HEC Legacy System	M-based database formerly used by the HEC and replaced by the HECMS
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.
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 -

Term	Definition
	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.
MT Thresholds	Income threshold levels set yearly within the VA for the purpose of establishing benefit levels for veterans
VA/DoD Identity Repository	VADIR provides VA with detailed electronic information directly from DoD on separating service members.
Veterans Online Application (VOA)	The 10-10EZ online application for healthcare benefits was replaced by an enhanced Veterans Online Application (VOA) benefits package to self-identify GWOT service members, and expand the use of DoD military service information to establish eligibility for health care benefits (VOA). Unlike the 10-10EZ data, which was placed in a temporary file and accessed through the Enrollment Application System (EAS) for manual processing by the intake clerk at the sites, the VOA data is transferred directly into the HECMS system.

User Release Notes

New Features, Functions, and Enhancements

E&E Web Service/T-Pharm

- *New E&E Web Service/T-Pharm services are now available to ESR users.*

Many divisions within the VA need access to authoritative Eligibility and Enrollment (E&E) information that the HEC maintains. These external departments need to have fast, real-time access to this E&E information in order to provide appropriate services to Veterans. The E&E service was first introduced in ESR 3.3 and was developed for the purpose of providing a summary of Veteran's E&E information.

ESR **V3.6** adds the following additional E&E Web Service/T-Pharm capabilities.

- In support of the Financial Services Center (FSC) Fee and Dialysis groups, sixteen additional fields were added to the E&E Web Service, plus the ability to pass a date-of-service parameter on a second request.
- The Eligibility Determination Service (EDS) was added in support of the Third-Party Pharmacy (T-Pharm) effort. This effort is being done in two phases. The first phase (ESR 3.6) will involve ESR receiving an Integration Control Number (ICN), determining the Eligibility Status based on the business rules, and returning the value to the requestor.
- A new service request will return historical data based on a Date of Service.
- A new Eligibility Determination request that returns "Eligible" or "Not Eligible" based on the Enrollment Status.

Public Law (PL111-163)

- *New Public Law information is now available to ESR users.*

The following enhancements are being undertaken to support Public Law 111-163, the “Caregivers and Veterans Omnibus Health Services Act of 2010”. This law provides assistance to caregivers of Veterans and improves the provisions of healthcare services to Veterans.

Section 511 exempts Catastrophically Disabled Veterans from copayments for hospital care and medical services, which includes copayments for prescription drugs, even if in Priority Group 2 or 3.

Section 512 authorizes MOH recipients be placed into VA enrollment Priority Group 3, unless eligible for a higher enrollment priority based on other eligibility factors.

ESR **V3.6** adds the following Public Law (PL111-163) requirements.

- The ***Medal of Honor Indicator*** data stored and displayed on the *Military Service* page is now editable.
- The ***Medal of Honor Indicator*** will be added to the eligibility criteria considered when assigning an Enrollment Priority Group.

Veterans Benefit HandBook

- *New Veterans Benefit HandBook capabilities are now available to ESR users.*

An individual Veterans Benefit Handbook is being provided to the Veteran. This Handbook contains Veteran eligibility and benefits information and is being provided for new enrollments and periodically thereafter. Additionally, ESR provides a communication Insert whenever there is a change in the Veteran's Eligibility Status or Preferred Facility.

Initially, the Batch Handbook Manager will schedule batch mailings for all Veterans by site and priority through the *Handbook Batch Request* tool in ESR. Once all Veterans have received a new Handbook, new enrollees will begin receiving a Handbook.

The Handbook will initially be mailed to Veterans. Eventually, the respective Handbook and subsequent updates will be available for viewing through the MyHealthVet and other VA portals. Authorized users will have the ability to view the Handbook, Handbook Inserts and the status of Handbook communications through the *Communications/Handbook Status* screen in ESR.

Additional trigger events have been added to ESR 3.6 that initiate the creation and sending of Handbooks and Inserts to Veterans. An example trigger event would be a change in a Veteran's Eligibility Status.

ESR **V3.6** adds the following Veteran Benefit HandBook capabilities.

- A new *HandBook Batch Request* (Add) screen has been added to provide users with the appropriate *Capability*, the ability to add a batch request for a *Veterans Benefit Handbook* to be mailed.
- A new **Default Handbook Batch Release Control Number** *System Parameter* has been added for changing the release control number that is used with a Handbook Batch Release.
- A new **Handbook Rollout Over** *System Parameter* has been added for turning the new enrollment triggers on and off. If the value is 'N', the trigger won't generate 400H (Handbooks) for new enrollments. The purpose of this trigger is to allow the Batch Handbook Manager to schedule batch mailings for all Veterans by site and priority. New incoming enrollments will not receive a Handbook until they are selected through the Handbook Batch Request tool. Once all Veterans have received a Handbook, the new enrollment trigger will be turned on, and veterans will automatically get a Handbook when they enroll.
- A new **Handbook Active** *System Parameter* has been added to prompt the sending of Handbook communications to the CMS.

VBA Pension Data Sharing

- *New VBA Pension Data Sharing capabilities are now available to ESR users.*

ESR **V3.3** added new data elements to the Enrollment Application system providing additional information concerning Pension Awards and Pension Terminations and whether or not dental services were provided to the Veteran at service separation.

ESR **V3.6** adds the following VBA Pension Data Sharing functionality between VistA and ESR.

- A new **VBA Data Sharing Indicator** *System Parameter* was added for activating the new ZE2 segment (VistA) for sharing VBA Pension Data to/from VistA sites.
- Eligibility for Dental benefits will also be shared with VistA sites.

Military Service Data Sharing (MSDS)

- *New MSDS capabilities are now available to ESR users.*

The purpose of the MSDS initiative is to implement process improvements for accessing military service information through real-time systems components (and interfaces) that access, evaluate and utilize military service information.

MSDS focuses on collecting information required to definitively determine basic Veteran eligibility as well as VHA Combat Veteran eligibility and identifying Operation Enduring Freedom (OEF) or Operation Iraqi Freedom (OIF) Veterans.

ESR **V3.6** adds the following MSDS capabilities.

- Automatic determination of OEF/OIF combat episodes using military pay and deployment records.
- Close and remove unwanted Work Items created from MSDS Broker data processing.

Technical Release Notes

Data Dictionary Changes

N/A

Enrollment Trigger Events

N/A

HL7 Messaging Changes

The ZE2 segment is for VBA Pension Data Sharing between ESR and VistA. It will be included on the ORU~Z11 from ESR to VistA, and on the ORU~Z07 and ORF~Z07 from VistA to ESR.

The ZE2 contains these sequences:

ZE2-1 has the Pension Dates in this format: PensionAwardDate~PensionTerminationDate;
where the dates are in YYYYMMDD format.

ZE2-2 has the Pension Award Reason in this format: ReasonCode~~VistA28.7

ZE2-3 has the Pension Termination Reasons (from 1 to 4) in this format:

ReasonCode1~~VistA28.7|ReasonCode2~~VistA28.7|ReasonCode3~~VistA28.7|ReasonCode4
~~VistA28.7

Sample ZE2 with Pension Termination data:

ZE2^~20110328^^FF~~VistA28.7~FFRE~~VistA28.7

Sample ZE2 with Pension Award data:

ZE2^20110328~^OO~~VistA28.7^