

**Medical Care Collection Fund (MCCF) Electronic Data
Interchange (EDI) Transaction Applications Suite
(TAS) ePayments Build 2/3**

Accounts Receivable PRCA*4.5*321

Integrated Billing IB*2.0*596

Version 4.0

**Deployment, Installation, Back-Out, and Rollback
Guide**



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**Department of Veterans Affairs
Office of Information and Technology (OI&T)**

Revision History

Date	Version	Description	Author
July 2017	1.0	Initial Version	Darlene White & Chris Edkins
September 2017	2.0	Incorporated the additional items to this document as the scope of work (VistA enhancements) increased when we combined Build 2 with Build 3.	Darlene White & Fred Altman
March 2018	3.0	Updated section 5.5.2 (User Acceptance Testing) from modified patch description. Changed release month.	Fred Altman
June 2018	4.0	Updated section 5.5.2 (User Acceptance Testing) from modified patch description. Changed release month.	Fred Altman

Artifact Rationale

This document describes the Deployment, Installation, Back-out, and Rollback Plan for new products going into the VA Enterprise. The plan includes information about system support, issue tracking, escalation processes, and roles and responsibilities involved in all those activities. Its purpose is to provide clients, stakeholders, and support personnel with a smooth transition to the new product or software, and should be structured appropriately, to reflect particulars of these procedures at a single or at multiple locations.

Per the Veteran-focused Integrated Process (VIP) Guide, the Deployment, Installation, Back-out, and Rollback Plan is required to be completed prior to Critical Decision Point #2 (CD #2), with the expectation that it will be updated throughout the lifecycle of the project for each build, as needed.

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1 Introduction

This document describes how to deploy and install IB*2.0*596 and PRCA*4.5*321 as well as how to back-out the product and rollback to a previous version or data set.

1.1 Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom IB*2.0*596 and PRCA*4.5*321 will be deployed and installed, as well as how the patches are to be backed out and rolled back, if necessary. The plan also identifies resources, communications plan, and rollout schedule. Specific instructions for installation, back-out, and rollback are included in this document.

1.2 Dependencies

The following patches must be installed **before** IB*2.0*596 and PRCA*4.5*321:

- IB*2.0*511
- PRCA*4.5*317
- PRCA*4.5*318
- PRCA*4.5*319

1.3 Constraints

This patch is intended for a fully patched VistA system.

2 Roles and Responsibilities

Table 1: Deployment, Installation, Back-out, and Rollback Roles and Responsibilities

ID	Team	Phase / Role	Tasks	Project Phase (See Schedule)
1	VA OI&T, VA OI&T Health Product Support & PMO (Leidos)	Deployment	Plan and schedule deployment (including orchestration with vendors)	Planning
2	Local VAMC and CPAC processes	Deployment	Determine and document the roles and responsibilities of those involved in the deployment.	Planning
3	Field Testing (Initial Operating Capability - IOC), Health Product Support Testing & VIP Release Agent Approval	Deployment	Test for operational readiness	Testing
4	Health Product Support and Field Operations	Deployment	Execute deployment	Deployment

ID	Team	Phase / Role	Tasks	Project Phase (See Schedule)
5	Individual Veterans Administration Medical Centers (VAMCs)	Installation	Plan and schedule installation	Deployment
6	VIP Release Agent	Installation	Ensure authority to operate and that certificate authority security documentation is in place	Deployment
7	N/A for this patch as we are using only the existing VistA system	Installation	Validate through facility POC to ensure that IT equipment has been accepted using asset inventory processes	N/A
8	VA's eBusiness team	Installations	Coordinate training	Deployment
9	VIP release Agent, Health Product Support & the development team	Back-out	Confirm availability of back-out instructions and back-out strategy (what are the criteria that trigger a back-out)	Deployment
10	No changes to current process – we are using the existing VistA system	Post Deployment	Hardware, Software and System Support	Warranty

3 Deployment

The deployment is planned as a national rollout.

This section provides the schedule and milestones for the deployment.

3.1 Timeline

The deployment and installation is scheduled to run for 30 days, as depicted in the master deployment schedule¹.

3.2 Site Readiness Assessment

This section discusses the locations that will receive the IB*2.0*596 and PRCA*4.5*321 deployment.

3.2.1 Deployment Topology (Targeted Architecture)

These patches, IB*2.0*596 and PRCA*4.5*321 are to be nationally released to all VAMCs.

¹ Project schedule (right click and select open hyperlink to access)

http://vawww.oed.portal.va.gov/pm/hape/ipt_5010/EDI_Portal/TAS%20Interim%20Repository/MCCF%20TAS%20Schedule.zip

3.2.2 Site Information (Locations, Deployment Recipients)

The test sites for IOC testing are:

- BOSTON HCS
 - NORTHPORT, NY
 - TOGUS, ME
-
- These sites will not be defined here until the sites have signed the Memorandum of Understanding (MOUs) and testing has completed as sometimes a site has to stop testing prior to the end of IOC.

Upon national release, all VAMCs are expected to install this patch by the compliance date.

3.2.3 Site Preparation

The following table describes preparation required by the site prior to deployment.

Table 2: Site Preparation

Site/Other	Problem/Change Needed	Features to Adapt/Modify to New Product	Actions/Steps	Owner
N/A	N/A	N/A	N/A	N/A

3.3 Resources

3.3.1 Facility Specifics

The following table lists facility-specific features required for deployment.

Table 3: Facility-Specific Features

Site	Space/Room	Features Needed	Other
N/A	N/A	N/A	N/A

3.3.2 Hardware

The following table describes hardware specifications required at each site prior to deployment.

Table 4: Hardware Specifications

Required Hardware	Model	Version	Configuration	Manufacturer	Other
Existing VistA system	N/A	N/A	N/A	N/A	N/A

Please see the Roles and Responsibilities table in Section 2 for details about who is responsible for preparing the site to meet these hardware specifications.

3.3.3 Software

The following table describes software specifications required at each site prior to deployment.

Table 5: Software Specifications

Required Software	Make	Version	Configuration	Manufacturer	Other
Fully patched Accounts Receivable package within VistA	N/A	4.5	N/A	N/A	N/A
PRCA*4.5*317	N/A	Nationally released version	N/A	N/A	N/A
PRCA*4.5*318	N/A	Nationally released version	N/A	N/A	N/A
PRCA*4.5*319	N/A	Nationally released version	N/A	N/A	N/A
Fully patched Integrated Billing package within VistA	N/A	2.0	N/A	N/A	N/A
IB*2.0*511	N/A	Nationally released version	N/A	N/A	N/A

Please see the Roles and Responsibilities table in Section 2 above for details about who is responsible for preparing the site to meet these software specifications.

3.3.4 Communications

The sites that are participating in field testing (IOC) will use the “Patch Tracking” message in Outlook to communicate with the ePayments eBusiness team, the developers, and product support personnel.

3.3.4.1 Deployment/Installation/Back-Out Checklist

The Release Management team will deploy patches IB*2.0*596 and PRCA*4.5*321, which are tracked in the NPM in Forum, nationally to all VAMCs. Forum automatically tracks the patches as they are installed in the different VAMC production systems. One can run a report in Forum to identify when the patch was installed in the VistA production at each site, and by whom. A report can also be run to identify which sites have not installed the patch in their VistA production system as of that moment in time.

Therefore, this information does not need to be manually tracked in the chart below.

Table 6: Deployment/Installation/Back-Out Checklist

Activity	Day	Time	Individual who completed task
Deploy	N/A	N/A	N/A
Install	N/A	N/A	N/A

4 Installation

4.1 Pre-installation and System Requirements

IB*2.0*596 and PRCA*4.5*321, patches to the existing VistA Integrated Billing 2.0 and Accounts Receivable 4.5 packages, are installable on a fully patched M(UMPS) VistA system and operate on the top of the VistA environment provided by the VistA infrastructure packages. The latter provides utilities which communicate with the underlying operating system and hardware, thereby providing Integrated Billing and Accounts Receivable independence from variations in hardware and operating system.

4.2 Platform Installation and Preparation

Refer to IB*2.0*596 and PRCA*4.5*321 documentation on the National Patch Module (NPM) on Forum for the detailed installation instructions. These instructions would include any pre-installation steps if applicable.

4.3 Download and Extract Files

Refer to IB*2.0*596 and PRCA*4.5*321 documentation on the NPM to find the location of related documentation that can be downloaded. IB*2.0*596 and PRCA*4.5*321 will be distributed via host file PRCA_IB_EPAYMENTS_BUNDLE_2_0.KID.

Sites can retrieve VistA software from download.vista.med.va.gov. This transmits the file from the first available server. Sites may also select to retrieve this file directly from a specific server.

Sites may retrieve software directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany	fo-albany.med.va.gov
Hines	fo-hines.med.va.gov
Salt Lake City	fo-slc.med.va.gov

The PRCA_IB_EPAYMENTS_BUNDLE_2_0.KID host file is located in the anonymous.software directory. Use the American Standard Code for Information Interchange (ASCII) Mode when downloading the file.

4.4 Database Creation

IB*2.0*596 and PRCA*4.5*321 modify the VistA database. All changes can be found on the NPM documentation for these patches.

4.5 Installation Scripts

No installation scripts are needed for IB*2.0*596 and PRCA*4.5*321 installation.

4.6 Cron Scripts

No Cron scripts are needed for IB*2.0*596 and PRCA*4.5*321 installation.

4.7 Access Requirements and Skills Needed for the Installation

The following staff will need access to the host file PRCA_IB_EPAYMENTS_BUNDLE_2_0.KID containing the IB*2.0*596 and PRCA*4.5*321 patches. The software is to be installed by the site's or region's designated: VA OI&T IT OPERATIONS SERVICE, Enterprise Service Lines, VistA Applications Division².

4.8 Installation Procedure

Refer to IB*2.0*596 and PRCA*4.5*321 documentation on the NPM for the detailed installation instructions.

4.9 Installation Verification Procedure

Refer to IB*2.0*596 and PRCA*4.5*321 documentation on the NPM for the detailed installation instructions. These instructions would include any post installation steps if applicable.

4.10 System Configuration

No system configuration changes are required for this patch.

4.11 Database Tuning

No reconfiguration of the VistA database, memory allocations or other resources is necessary.

² "Enterprise service lines, VAD" for short. Formerly known as the IRM (Information Resources Management) or IT support.

5 Back-Out Procedure

Back-Out pertains to a return to the last known good operational state of the software and appropriate platform settings.

5.1 Back-Out Strategy

Although it is unlikely, due to care in collecting, elaborating, and designing approved user stories, followed by multiple testing stages (Developer Unit Testing, Component Integration Testing, SQA Testing, and User Acceptance Testing), a back-out decision due to major issues with this patch could occur. A decision to back out could be made during site Mirror Testing, Site Production Testing or after National Release to the field (VAMCs). The best strategy decision is dependent on the stage of testing during which the decision is made.

If during Mirror testing or Site Production Testing, a new version of a defect correcting test patch is produced, retested and successfully passes development team testing, it will be resubmitted to the site for testing. If the patch produces catastrophic problems, a new version of the patch can be used to restore the build components to their pre-patch condition.

If the defect(s) were not discovered until after national release but during the designated support period, a new patch will be entered into the National Patch Module on Forum and go through all the necessary milestone reviews etc., as a patch for a patch. It is up to VA OI&T and product support whether this new patch would be defined as an emergency patch or not. This new patch could be used to address specific issues pertaining to the original patch or could be used to restore the build components to their original pre-patch condition.

After the support period, the VistA Maintenance Program would produce the new patch, either to correct the defective components or to back-out the patch.

5.2 Back-Out Considerations

It is necessary to determine if a wholesale back-out of the patches IB*2.0*596 and PRCA*4.5*321 are needed or if a better course of action is to correct through a new version of the patch (if prior to national release) or through a subsequent patch aimed at specific areas modified or affected by the original patch (after national release). A wholesale back-out of the patch will still require a new version (if prior to national release) or a subsequent patch (after national release). If the back-out is post-release of patches IB*2.0*596 and PRCA*4.5*321, these patches should be assigned status of “Entered in Error” in Forum’s NPM.

5.2.1 Load Testing

N/A. The back-out process would be executed at normal, rather than raised job priority, and is expected to have no significant effect on total system performance. Subsequent to the reversion, the performance demands on the system would be unchanged.

5.2.2 User Acceptance Testing

1. Daily Activity Report Enhancements [RCDPE EDI LOCKBOX ACT REPORT]

- a) The Matched Payment amount posted line was removed from the daily and final totals.
- b) The report header will display selected Division numbers instead of selected division names.
- c) In detail mode, the report will page break on each daily total, on the final total and when an Electronic Funds Transfer (EFT) deposit cannot be fully displayed on the page.
- d) The report will no longer be sent via email to the mail group RCDPE PAYMENTS as part of the nightly process.
- e) A new filter was added to allow the user to only select EFTs with debit vouchers.
- f) A new debit column was added to the report to indicate which EFTs have debit vouchers.
- g) The daily and final totals will now display the number of EFTs with debit vouchers and the total amount of those EFTs.

2. Receipt Comment History

- a) A comment is now required when a clerk puts funds into suspense. The following areas are affected:
 - ERA Worklist [RCDPE EDI LOCKBOX WORKLIST] Scratchpad Split/Edit action
 - Auto-Post Awaiting Resolution [RCDPE APAR] (APAR Worklist) Scratchpad Split/Edit action
 - Link Payment to Account [RCDP LINK PAYMENT TO ACCOUNT] worklist in the LP and CS actions
- b) The Clerk will have the option of selecting a 'standard' comment from a predefined list, or entering a free text comment that is at least 3 characters long.
- c) The user who entered the comment and the date/time it was entered will now be captured by the system.
- d) When the comment is displayed in the ERA Worklist Scratchpad or the APAR scratchpad, the system will now also display the user who entered the comment and the date/time it was entered.
- e) A new file was created, RCDPE COMMENT HISTORY (#344.78) which will contain the complete history of suspense related comments for receipts.
- f) The entire comment history will be displayed in the Summary SF215 Report [RCDP SUMMARY 215 REPORT] when this report is run in detail mode.
- g) The entire comment history will also be displayed in the Link Payment Tracking Report [RCDPE SUSPENSE AUDIT REPORT].
- h) Any receipt that is purged as part of the nightly process will also have its comment history in the RCDPE COMMENT HISTORY file (#344.78)

purged at the same time.

3. Corrections to the EFT Transaction Audit Report [RCDPE EFT TRANSACTION AUD REP]

The software has been modified to fix a bug when old cash receipts (CR) are used in calculations for the report.

4. Corrected EEOB Attachment to Claims

The software has been modified such that ERA Worklist and APAR will automatically move an Electronic Explanation of Benefits (EEOB) when a line is split/edited when possible. The automatic moving of an EEOB will follow the same rules as the existing EEOB Move/Copy/Remove [RCDPE EEOB MOVE/COPY/REMOVE] menu option.

The automatic update will occur at receipt creation in the PRCA nightly autopost job (for APAR changes) or at receipt creation for the ERA Worklist.

Details of the move/copy/delete transactions and justification text may be viewed in the EEOB Move/Copy/Remove Audit Report [RCDPE EEOB MOVE/COPY/REMOVE RPT] option and are also displayed in Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY] (TPJI) within the action Account Profile followed by the action Comment History.

5. EFT edits in Receipt Processing [RCDP RECEIPT PROCESSING]

The software was modified such that:

- a) Users who have the RCDPEPP security key may change the TYPE OF PAYMENT from CHECK/MO PAYMENT to EDI LOCKBOX on receipts that have pre-existing lines and allow the clerk to add/attach a new EFT to the receipt.
- b) Users who have the RCDPEPP security key may change the EFT number on receipts when the TYPE OF PAYMENT equals 'EDI LOCKBOX'.
- c) When the EFT number is changed on receipts with TYPE OR PAYMENT equals EDI LOCKBOX, the EFT that was removed is unmatched and appears on the EFT Unmatched Aging report so it can be matched to a new ERA.
- d) The header of the Receipt Processing worklist was enhanced to include the display of the ERA number, ERA total, EFT number and the EFT Total associated with the deposit when appropriate.
- e) Two additional prompts were added to the On-Line Entry action. The user will now be asked to confirm the EFT funds have been entered into the 8NZZ account and will also be asked to enter the FMS

Reference Number (#344, 200).

6. Payer Name Display and Selection issues when the Payer Name is greater than 30 characters.
 - a) The 835 CARC Data Report [RCDPE CARC CODE PAYER REPORT] now allows payers with names that are longer than 30 characters to be selected and displayed on the report.
 - b) The EFT/ERA Trending Report [RCDPE EFT-ERA TRENDING REPORT] now allows payers with names that are longer than 30 characters to be selected and displayed on the report.
 - c) The Provider Level Adjustments Report [RCDPE PROVIDER LVL ADJ REPORT] now allows payers with names that are longer than 30 characters to be selected and displayed on the report.
 - d) The ERA Unmatched Aging Report [RCDPE ERA AGING REPORT] now allows payers with names that are longer than 30 characters to be selected and displayed on the report.

7. Move EEOBs to Claims with Payments linked from Suspense

The Link Payment option will be modified such that:

- a) When the user enters the associated Electronic Remittance Advice (ERA), the system will automatically find the associated EEOB and prompt the user to attach it to the claim.
 - b) Only Posted EEOBs will be displayed to allow the user to attach it to the claim.
 - c) When prompting the user to attach a posted EEOB to the claim, the system will display the Trace Number, Total Amount Paid, Removed By user and the Justification comment.
 - d) All restored EEOBs will appear on the EEOB Move/Copy/Remove Audit Report [RCDPE EEOB MOVE/COPY/RMOVE RPT].
8. The menu option Move ERA Total to Suspense [RCDPE MOVE ERA TO SUSPENSE] was removed from the system.
 9. When manually creating a new receipt, help text was added to the 'PATIENT NAME OR BILL NUMBER' prompt.
 10. The Refresh Scratch Pad action was removed from the APAR Worklist.
 11. Added Sort options to the Auto-Post Awaiting Resolution (APAR) [RCDPE APAR].
 - a) Added the ability to sort the APAR worklist by Date Created, Payer Name, APAR Reason, Posted Amount and Unposted Amounts. If the user selects to sort by Date Created, they are then prompted to display the ERAs in Ascending or Descending Date

Created Order. If they select to sort by Posted or Unposted Amounts, they are then prompted to display the ERAs in highest to lowest or lowest to highest order.

- b) Added a column to the body of the worklist to display the Date Created of the ERA. Note that this column is past the 80 character screen margin width so the user will have to use the right arrow key to scroll the display to see the Date Created values.

12. EDI Lockbox 3rd Party Exceptions [RCDPE EXCEPTION PROCESSING]

- a) If a pharmacy claim had an ECME rejected claim line followed by a data exception on a subsequent claim line, the display of the claim line data was incorrect. This was fixed such that the correct claim line data is displayed for the claim.

13. Default Service Date from the Start Date when creating ERAs for Pharmacy claims with no specified Service Date.

- a) ERAs are created during the nightly ePayments process. The service date will now automatically default from the start date when an ERA is created for a pharmacy claim with no specified service date.

14. New Identify Payers [RCDPE PAYER IDENTIFY] option added to the EDI LOCKBOX (EPAYMENTS) [RCDPE EDI LOCKBOX MENU] ePayments menu.

- a) The Identify Payers menu option was added as the last displayed option on the EDI LOCKBOX (EPAYMENTS) ePayments menu.
- b) This new option displays a worklist that allows users to identify payers in the RCDPE AUTO-PAY EXCLUSION file (#344.6) as Pharmacy and/or Tricare Payers. Two new fields PHARMACY PAYER (#344.6, .09) and TRICARE PAYER (#344.6, .1) were added to the file for this purpose. All users with access to the Identify Payers menu option will be able to view and edit the current payer settings.
- c) Identifying payers as Pharmacy and/or Tricare payers will enable future sorting/filtering enhancements for Pharmacy and Tricare payers.

15. New AR SITE PARAMETER settings for auto-auditing EDI medical and Pharmacy claims.

- a) Prior to this enhancement, only paper medical and pharmacy claims could be auto-audited.
- b) Two new fields AUTO-AUDIT MEDICAL EDI BILLS (#341, 7.07) and AUTO-AUDIT RX EDI BILLS (#341, 7.08) were added for the purpose of auto-auditing.
- c) The new site parameter settings are maintained through the EDI Lockbox Parameters [RCDPE EDI LOCKBOX PARAMETERS] menu option.
- d) Changes were made to the ePayments auto-audit nightly process to

auto-audit EDI medical and pharmacy claims based upon the new values of these two new fields.

- e) These new site parameter fields have also been added to the EDI Lockbox Parameters Report [RCDPE SITE PARAMETER REPORT].

16. Change to the maximum allowed values of two EDI Lockbox Parameters [RCDPE EDI LOCKBOX PARAMETERS] options.

- a) The maximum allowed value of the Number of Days (AGE) of Unposted Medical EFTs to Prevent Posting (#344.61, .06) was changed to allow a maximum of 60 days instead of 99.
- b) The maximum allowed value of the Number of Days (AGE) of Unposted Pharmacy EFTs to Prevent Posting (#344.61, .07) was changed to allow a maximum of 365 days instead of 999.

17. Auto-Posting of manually matched ERAs/EFTs in the ePayments nightly auto-posting process.

- a) Prior to this enhancement, ERAs and EFTs that were manually matched would auto-post during the nightly process. Only ERAs with a payment type of ACH were auto-post candidates. Now ERAs with a payment type of CHK are also auto-post candidates.
- b) The manual match action on the ERA Worklist [RCDPE EDI LOCKBOX WORKLIST] and the Manual Match EFT-ERA menu option [RCDPE MANUAL MATCH EFT-ERA] were enhanced to allow ERAs with a payment type of CHK to be marked for auto-post.
- c) Unbalanced ERAs that were manually marked for auto post will not auto post. These can be found on the ERA Worklist for user action.

18. Prevent manual and auto-auditing of any claims that have billing rejects on the Claim Status Awaiting Resolution Worklist (CSA) [IBCE CLAIMS STATUS AWAITING]

- a) Any claims that have billing rejects on the CSA will not be audited in the nightly auto-auditing process.
- b) Users will also be prevented from manually auditing any claims that have billing rejects on the CSA using the Audit Setup New Accounts Receivable [PRCA SET/AUDIT NEW BILL].

19. Add new filters, sort and worklist option to the List of Receipts Report [RCDP LIST OF RECEIPTS REPORT].

- a) Added the ability to sort the Lists of Receipt Report by Date Opened, FMS Status or Type of Payment.
- b) Added the ability to filter the report by FMS Status. If the user chooses to filter by FMS Status, they will be prompted to enter the FMS Status(es) to display on the report.
- c) Added the ability to filter the report by Payment Type. If the user chooses to filter by Payment Type, they will be prompted to enter the Payment Type(s) to display on the report.

- d) Added the option to display the report in a worklist that allows the user to select a receipt and perform the Process Receipt [RCDP RECEIPT PROCESSING] action.
 - e) Added a new cross-reference to the AR BATCH PAYMENT file (#344). on the DATE OPENED field (#344. 03) so that receipts can be retrieved for a selected date range and greatly increase the performance of the report.
20. New filters added to the ERA Worklist [RCDPE EDI LOCKBOX WORKLIST].
- a) A new filter was added to ERA Worklist to filter ERAs by Zero Dollar, Payment or both. If the user selects the Zero Dollar filter, only ERAs with a TOTAL AMOUNT PAID (#344.4, .05) of zero will be displayed. If the user selects the Payment filter, all ERAs with a TOTAL AMOUNT PAID of zero will be skipped.
 - b) The current filter of Medical, Pharmacy or Both was amended to Medical, Pharmacy, Tricare or All. If the Tricare filter is selected, only ERAs with a payer flagged as Tricare in the RCDPE AUTO-PAY EXCLUSION file (#344.6) will be displayed.
21. Allow ERAs matched to an EFT with a receipt status of ON-LINE to be auto-posted and/or processed in the ERA Worklist [RCDPE EDI LOCKBOX WORKLIST].
- a) Prior to this enhancement, the ePayments nightly auto-post process would skip any ERAs that were matched to an EFT with a receipt status of ON-LINE. These ERAs will now auto-post.
 - b) Prior to this enhancement the Receipt Processing action on the Worklist scratch pad was disabled for ERAs that were matched to an EFT with a receipt status of ON-LINE. The user will now be able to access the Receipt Processing action.
22. Issues with processing of Pharmacy claims by the nightly process were corrected.
- a) Caremark claims with valid ECME numbers of 8 characters in length or more were being transformed into format nnn-nnnnn.. prior to using ECME number to match the incoming claim to a VistA bill. This prevented matching and caused a large number of ERA lines to be marked as exceptions. The transform has been removed for pharmacy claims only and the unmodified ECME number will now be used for matching to bills.
 - b) The nightly process which cleared exceptions for recently released prescriptions, was not picking up a date for use in ECME to bill matching. The matching was being performed without a date. This has been corrected.

5.3 Back-Out Criteria

The project is canceled or the requested changes implemented by IB*2.0*596 and PRCA*4.5*321 are no longer desired by VA OI&T and the ePayments eBusiness team, or the patch produces catastrophic problems.

5.4 Back-Out Risks

Since the ePayments software is tightly integrated with external systems, any attempt at a back-out should include close consultation with the external trading partners such as the Financial Services Center (FSC), the Health Care Clearing House (HCCH), the VA 3rd Party Lockbox bank, and the Financial Management System (FMS) to determine risk.

5.5 Authority for Back-Out

The order would come jointly from: the release coordinator (product support), portfolio director, and health product support. This should be done in consultation with the development team and external trading partners such as FSC, the HCCH, VA 3rd Party Lockbox bank, and the FMS to determine the appropriate course of action. ePayments is tightly integrated with these external partners and a back-out of the patch should not be a standalone decision.

5.6 Back-Out Procedure

The rollback plan for VistA applications is complex and not 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 ticket if it is a nationally released patch. If not, the site should contact the Enterprise Program Management Office (EPMO) team directly for specific solutions to their unique problems.

The IB*2.0*596 and PRCA*4.5*321 patches contain the following build components.

- Routines
- Data Dictionary Changes
- Options
- Security Keys
- Protocols

While the VistA installation procedure of the KIDS build allows the installer to back up the modified routines using the ‘Backup a Transport Global’ action, the back-out procedure for global, data dictionary and other VistA components is more complex and requires issuance of a follow-up patch to ensure all components are properly removed and/or restored. 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.

Please contact the EPMO team for assistance since this installed patch contains components in addition to routines.

5.7 Back-out Verification Procedure

Successful back-out is confirmed by verification that the back-out patch was successfully installed.

6 Rollback Procedure

Rollback pertains to data. IB*2.0*596 and Patch PRCA*4.5*321 do impact the data in the Integrated Billing and Accounts Receivable packages. Therefore, to roll back the patches one will need to install new patches to roll back the database changes and restore the system back to its prior state. In the case where a rollback is needed, refer to the Back-Out procedures detailed elsewhere within this document.

6.1 Rollback Considerations

Not applicable.

6.2 Rollback Criteria

Not applicable.

6.3 Rollback Risks

Not applicable.

6.4 Authority for Rollback

Not applicable.

6.5 Rollback Procedure

Not applicable.

6.6 Rollback Verification Procedure

Not applicable.

Template Revision History

Date	Version	Description	Author
March 2016	2.2	Changed the title from Installation, Back-Out, and Rollback Guide to Deployment and Installation Guide, with the understanding that Back-Out and Rollback belong with Installation.	VIP Team
February 2016	2.1	Changed title from Installation, Back-Out, and Rollback Plan to Installation, Back-Out, and Rollback Guide as recommended by OI&T Documentation Standards Committee	OI&T Documentation Standards Committee
December 2015	2.0	The OI&T Documentation Standards Committee merged the existing <i>"Installation, Back-Out, Rollback Plan"</i> template with the content requirements in the OI&T End-user Documentation Standards for a more comprehensive Installation Plan.	OI&T Documentation Standards Committee
February 2015	1.0	Initial Draft	Lifecycle and Release Management