Medical Care Collection Fund (MCCF) Electronic Data Interchange (EDI) Transaction Applications Suite (TAS) Phase 1

eInsurance IB*2.0*582

Version 1.2

Deployment, Installation, Back-Out, and Rollback Guide

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Revision History

Date	Version	Description	Author
April 2017	1.1	Initial Version	Timothy Zimmer
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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 of these activities. Its purpose is to provide clients, stakeholders, and support personnel a smooth transition to the new product or software. This document should be structured to reflect the application of these procedures to either a single site or to multiple sites.

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 the IB*2.0*582 patch and 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
- to whom

to deploy and install the IB*2.0*582 patch. It also describes how to back it out and roll it back if necessary. The plan identifies resources, communications plan, and rollout schedule and provides specific instructions for installation, back-out, and rollback.

1.2 Dependencies

IB*2.0*497, IB*2.0*549, and IB*2.0*579 must be installed **before** IB*2.0*582.

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 Affairs 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	
8	VA's eBusiness team	Installation	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 schedule[1].

3.2 Site Readiness Assessment

This section discusses the locations that will receive the IB*2.0*582 deployment.

3.2.1 Deployment Topology (Targeted Architecture)

This patch IB*2.0*582 is to be nationally released to all VAMCs.

[1] Project schedule (right click and select open hyperlink to access) http://vaww.oed.portal.va.gov/pm/hape/ipt_5010/EDI_Portfolio/TAS%20Interim%20Repository/MCCF%20TAS%20Schedule.zip

3.2.2 Site Information (Locations, Deployment Recipients)

The test sites for IOC testing are: TBD

- 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 within the compliance dates.

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 Integrated Billing package within VistA	N/A	2.0	N/A	N/A	N/A
IB*2.0*497	N/A	Nationally released version	N/A	N/A	N/A
IB*2.0*549	N/A	Nationally released version	N/A	N/A	N/A
IB*2.0*579	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 eBusiness eInsurance sub-team, the developers, and product support personnel.

3.3.5 Deployment/Installation/Back-Out Checklist

The Release Management team will deploy the patch IB*2.0*582, which is tracked in the National Patch Module (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 and by whom the patch was installed in the VistA production at each site. A report can also be run to identify which sites have not currently installed the patch in their VistA production systems. 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
Back-Out		N/A	N/A	N/A

4 Installation

4.1 Pre-installation and System Requirements

IB*2.0*582, a patch to the existing VistA Integrated Billing 2.0 package, is installable on a fully patched M(UMPS) VistA system and operates on top of the VistA environment provided by the VistA infrastructure packages. The latter provides utilities which communicate with the underlying operating system and hardware, providing Accounts Receivable independence from variations in hardware and operating system.

4.2 Platform Installation and Preparation

Refer to the IB*2.0*582 documentation on the NPM option 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 the IB*2.0*582 documentation on the NPM to find related documentation that can be downloaded. IB*2.0*582 will be transmitted via a PackMan message and can be pulled from the NPM. It is not a host file, and therefore does not need to be downloaded separately.

4.4 Database Creation

IB*2.0*582 does not modify the VistA database. If it did any changes could be found on the NPM documentation for this patch.

4.5 Installation Scripts

No installation scripts are needed for IB*2.0*582 installation.

4.6 Cron Scripts

No Cron scripts are needed for IB*2.0*582 installation.

4.7 Access Requirements and Skills Needed for the Installation

The following staff need access to the PackMan message containing the IB*2.0*582 patch or Forum's NPM in order to download the nationally released IB*2.0*582 patch. The software is to be installed by the sites or regions designated: VA OI&T IT OPERATIONS SERVICE, Enterprise Service Lines, and/or VistA Applications Division[2].

4.8 Installation Procedure

Refer to the IB*2.0*582 documentation on the NPM for the detailed installation instructions.

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

4.9 Installation Verification Procedure

Refer to the IB*2.0*582 documentation on the NPM for detailed installation instructions. These instructions 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.

5 Back-Out Procedure

Back-Out pertains to a return to the last known valid instance of operational software and platform settings.

5.1 Back-Out Strategy

Although backout 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 during site Mirror Testing, Site Production Testing or after National Release to the field (VAMCs). The strategy would depend on the stage during which the decision is made.

5.1.1 Mirror Testing or Site Production Testing

If during Mirror testing or Site Production Testing, a new version of the test patch correcting defects were to be produced, retested and successfully passed development team testing, it would be resubmitted to the site for testing. If the patch produced catastrophic problems, a new version of the patch could be used to restore the build components to their pre-patch condition.

5.1.2 After National Release but During the Designated Support/Warranty Period

If the defect(s) were not discovered until after national release but during the designated support period, a new patch would 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.

5.1.3 After National Release and Warranty Period

After the support period, the VistA Maintenance Program would produce the new patch, either to correct the defective components or restore the build components to their original pre-patch condition.

5.2 Back-Out Considerations

It is necessary to determine whether a wholesale back-out/rollback of the patch IB*2.0*582 is necessary or whether a better course of action is to correct the patch through a new version (if prior to national release). If the back-out is post-release of patch IB*2.0*582 then a subsequent patch would be aimed at specific areas modified or affected by the original patch and this patch should be assigned status of “Entered in Error” in Forum’s NPM.

5.2.1 Load Testing

N/A. The back-out process if necessary is 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

The eInsurance Team of eBusiness Solutions will be able to confirm that multiple 270s are being generated from an ambiguous response from a payer.

Financial Services Center (FSC) will be able to send a test MUP message to insure that it is NOT added to the Payer table.

Patient Policy Comments will no longer be shown on the Claim Information Screen menu when a claim is selected in Third Party Joint Inquiry (TPJI).

The Service Type Code will no longer be visible for the Enter Service Type Code prompt in Electronic Insurance Inquiry. It will be hardcoded to 30 in the background.

The insurance contact prompts will be restored to the Edit All action of the Insurance Information screen.

Users will no longer be able to self-enroll in the IBCNE EIV MESSAGE mail group.

5.3 Back-Out Criteria

The project is canceled or the requested changes implemented by IB*2.0*582 are no longer desired by VA OI&T and the eBusiness eInsurance sub-team.

5.4 Back-Out Risks

Since the eInsurance 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) and the Health Care Clearing House (HCCH) to determine risk.

5.5 Authority for Back-Out

The order would come from: 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 and the HCCH to determine the appropriate course of action. eInsurance 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 its unique problems.

The IB*2.0*582 patch contains the following build components.

- Routines
- Mail Group change
- FileMan file entries used by the Forms Output Utility [IBCE OUTPUT FORMATTER]
- A file entry from NEW PERSON (#200) file.
- Protocol Menu Changes

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. 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. The only data changes in this patch are specific to the operational software and platform settings and they are covered in the Back-out procedures detailed elsewhere in 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.