**Health Administration Product Enhancements (HAPE**

**Electronic Data Interchange (EDI)**

**Medical Care Collection Fund (MCCF) Enhancements**

Eligibility Benefits and Claims Status Data Content and Infrastructure

RELEASE NOTES/Installation Guide/Rollback Plan

**IB\*2\*528**



Department of Veterans Affairs

March 2016

Version 2.0

Office of Information and Technology (OI&T)

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# 

# Introduction

This patch implements changes to VistA's Integrated Billing (IB), Insurance Company, and Patient Insurance File modules are requested by the Veterans Health Administration (VHA) Chief Business Office (CBO) eBusiness Solutions Department to comply with the legislative changes mandated by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

The IB application is a character-based system using VA FileMan as its database manager and Cache/M (TRM approved, http://trm.oit.va.gov/StandardPage.asp?tid=6402) as the programming language. This software application is part of the VistA suite of applications, which includes additional clinical and financial applications. There are no Graphical User Interfaces (GUIs).

\*\*\*Note:

The newly added software application System Sharing Verified Insurance (SSVI) Parameter in the eIV Site Parameters is set to OFF during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be set to OFF so as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

IB SSVI mail group:

During the install a new mail group "IB SSVI" will be installed within the VistA database and the installer will be prompted to "Enter the Coordinator for Mail Group IB SSVI:". The IB SSVI mail group will need the name of a person that will be responsible (COORDINATOR) for maintaining the membership of the IB SSVI mail group. Mail messages will be sent to the IB SSVI mail group for identifying SSVI issues.The coordinator name is the appropriate CPAC insurance verification manager for the specific region. If you do not know the name of the CPAC insurance verification manager please contact the rapid response mail group at: [vhaeinsurancerapidresponse@va.gov](mailto:vhaeinsurancerapidresponse@va.gov)

\*\*\*Note:

The newly added software application Consistency Checker source code that uses the options Patient Insurance Info View/Edit (PI)--> Verify Coverage (VC) is now disabled ('commented out') so as to not use the "Consistency Checker" source code to verify coverage. This feature will be modified within future IB projects with instructions on how to use this newly added Consistency Checker feature in conjunction with the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

\*\*\*Note:

The host file "MCCF\_FY14\_HPID\_EIV\_1\_0.KID" contains two patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) that are bundled together into this host file. The two patches are NOT DEPENDENT on each other. After loading the distribution "MCCF\_FY14\_HPID\_EIV\_1\_0\_V20.KID" and installing the distribution "MCCF FY14 HPID EIV 1.0", the installation of BOTH patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) will be installed together AUTOMATICALLY.

\*\*\*Note:

When installing patch IB\*2.0\*528 answer "YES" at the following prompt:

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// YES

In general, the sites may have a background process that is jobbed off at non-peak hours to rebuild the Menu Trees. It is recommended that the sites rebuild the Menu Trees (after the patch is installed and during non-peak hours).

\*\*\*Note:

There are several data reports that when printing/displaying/exporting the data it is recommended to use the 132 or 254 columns to display/print/export. The users will receive a warning message in such a case. It is recommended to have the user’s terminal emulation setting for the 'auto-wrap' feature set to 'on'. This will allow the user to view text on the next line when the user is entering/editing comment text fields that extend past the end of the line.

System Sharing Verified Insurance (SSVI):

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will utilize IB Patient Insurance data stored in VA VistA databases residing on approximately 134 VA VistA servers located at 129 VA Medical Centers. There are approximately 750 current users of the IB Patient Insurance application within the VA VistA databases.

Updates to the Patient Insurance data will be shared between VA VistA sites both locally and nationally where the patient has been seen. Only those sites that choose to turn on this option will receive the updated Insurance information.

Note: A new user, AUTOUPDATE,IBEIV, will be created in the NEW PERSON File (#200) during installation. When a patient's insurance is updated at a receiving site, this user name will be the generic name showing that the insurance was last updated or verified by the SSVI process.

The actual transmission of insurance information to other subscribers shall be done in a batch processing fashion. This will be executed by a background job that shall be tasked once a day.

The background job will search for patients who have had the flag to transmit the patient's information set via user indication.

When the Background job runs, it will take the latest "snapshot" of the patient's insurance information (all Active policies & plans, along with all Medicare (M) plans).

After a user updates a patient Insurance record a trigger is initiated that will at the end of the day create a global file containing the updated patient Insurance. Those messages will only be sent to those sites where that patient had visits.

A "consistency checker" to ensure all required sub-fields under the Insurance Type multiple field (multiple field # .3121) in the Patient (#2) file are complete before sending the information to other facilities. A parameter, in the form of a VistA option, will be created to allow each VA site to enable or disable this feature.

A user report can be run for sending and receiving patient insurance information at a site.

SSVI - Data Source/Location(s):

The updated Insurance information will reside in the site's existing VistA database where the patient has been seen and optionally transferred to those subscribing VA sites via Remote Query. Those subscribing sites will receive then store the updated information within their VA VistA database until processed.

Three files have been created. IB INSURANCE INCONSISTENT ELEMENTS contains the fields or categories to be checked for inconsistencies following an editing session of the insurance edit option information. IB INSURANCE INCONSISTENT DATA is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI PIN/HL7 PIVOT FILE is a storage area for all the remote query transaction information.

The project will allow the processing/sending of updated patient insurance information via Remote Query messaging. The user will set a flag to have the option of transmitting any updated patient insurance information.

Eligibility Benefits and Claims (Screens):

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will create enhancements to the VA VistA system utilizing the IB Version 2.0 software application.

Enhancements will include the creation/modifications of existing Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side comparison of the Insurance Verification Processor buffer information against the patient's Subscriber information found in sub-file (#2.312)Insurance Type File of the Patient File (#2).
2. A newly created Annual Benefits screen will allow the user to View/Edit/Save the patient annual benefits found within file (#355.4) Annual Benefits File.
3. A newly created Coverage Limitations screen will allow the user to View/Edit/Save the patient coverage limitations data found within file (#355.32) Plan Coverage Limitations File.
4. Standardization of certain insurance subscriber display field names from "Insured (Person)" or "Patient" to "Subscriber".

Security Key Updates:

Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as appropriate.
2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.
3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN INSURANCE CO EDIT option.

Eligibility Benefits and Claims (Patient Policy Information screen - Comments):

Enhancements made to the patient policy comments displayed in the Patient Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the Patient Policy Information screen include:

1. Retrieval of comment data from the new COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18).
2. Display of comments in Comment -- Patient Policy region.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient Policy Information screen include:

1. Provides the capability for the user to enter up to 245 characters of comments
2. Provides the capability for the user to edit previously entered comments entered on the same day
3. The user-entered comments, the date/time that the comment was entered/edited, and the user ID (DUZ) gets stored in the respective fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):

COMMENT DATE/TIME (2.342,.01)

LAST EDITED BY (2.342,.02)

COMMENT (2.342,.03)

1. Due to the authorized usage of the existing COMMENT PATIENT POLICY field (2.312, 1.08) by other applications (ICRs), the old comment field and the new comment multiple are to be populated until the IA subscribers have made the necessary changes to their applications to reference the new fields at the 2.312, 1.18 multiple. To that end the following DD definitions were made:
   1. Trigger cross-reference was defined to the COMMENT field (2.342, .03) that will populate the COMMENT PATIENT POLICY field (2.312, 1.08) when data is entered/edited at the COMMENT field (2.342, .03).
   2. Mumps cross-reference was defined to the COMMENT PATIENT POLICY field (2.312, 1.08) that will populate the fields at the COMMENT SUBCRIBER POLICY multiple only when both the old and the new comment field is different.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Reports:

Several new reports will be added to the IB menus and existing reports will be updated.

* + 1. A new report will be created to capture Group Plans without annual benefits for a requested year.
    2. An audit report will be created to monitor changes to four IB insurance-related files.
    3. A new report will be created to capture outgoing and incoming HL7 messages between VistA and the Financial Services Center (FSC).
    4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will be added to the eIV Payer Link Report. (The "HPID/OEID" field was added in IB\*2.0\*521.)
    5. A new submenu will be created to display all insurance-related reports under one menu.
    6. IB reports will be enhanced to enable output to Excel spreadsheets.

## Documentation Retrieval

Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from download.vista.med.va.gov. This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server. Sites may retrieve the software and/or documentation directly using Secure 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

Documentation can also be found on the VA Software Documentation Library at: http://www4.va.gov/vdl/

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

File Description File Name FTP Mode

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Integrated Billing User Manual IB\_2\_0\_UM.PDF (binary)

Integrated Billing Technical Manual/ IB\_2\_0\_TM.PDF (binary)

Security Guide

Integrated Billing Release Notes IB\_2\_0\_P528\_RN.PDF (binary)

Electronic Insurance Verification (eIV) IB\_2\_0\_EIV\_TM.PDF (binary)

Technical Manual/Security Guide

Electronic Insurance Verification (eIV) User Manual IB\_2\_0\_EIV\_UG.PDF (binary)

# Patch Description and Installation Instructions

## Patch Description

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

Run Date: MAR 28, 2016 Designation: IB\*2\*528 TEST v21

Package : INTEGRATED BILLING Priority : MANDATORY

Version : 2 Status : UNDER DEVELOPMENT

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

Associated patches: (v)IB\*2\*516 <<= must be installed BEFORE `IB\*2\*528'

Subject: MCCF ENHANCEMENTS PROJECT - EIV

Category: ROUTINE

INPUT TEMPLATE

OTHER

ENHANCEMENT

Description:

===========

This patch implements changes to VistA's Integrated Billing (IB),

Insurance Company, and Patient Insurance File modules are requested by

the Veterans Health Administration (VHA) Chief Business Office (CBO)

eBusiness Solutions Department to comply with the legislative

changes mandated by the Health Insurance Portability and Accountability

Act of 1996 (HIPAA).

The IB application is a character-based system using VA FileMan as its

database manager and Cache/M (TRM approved,

http://trm.oit.va.gov/StandardPage.asp?tid=6402) as the programming

language. This software application is part of the VistA suite of

applications, which includes additional clinical and financial

applications. There are no Graphical User Interfaces (GUIs).

\*\*\*Note:

The newly added software application System Sharing Verified Insurance

(SSVI) Parameter in the eIV Site Parameters is set to OFF

during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be left OFF so

as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

IB SSVI mail group:

During the install a new mail group "IB SSVI" will be installed within

the VistA database and the installer will be prompted to "Enter the

Coordinator for Mail Group IB SSVI:". The IB SSVI mail group will need

the name of a person that will be responsible (COORDINATOR) for

maintaining the membership of the IB SSVI mail group. Mail messages will

be sent to the IB SSVI mail group for identifying SSVI issues.

The coordinator name is the appropriate CPAC insurance verification

manager for the specific region. If you do not know the name of the CPAC

insurance verification manager please contact the rapid response mail

group at: [vhaeinsurancerapidresponse@va.gov](mailto:vhaeinsurancerapidresponse@va.gov)

\*\*\*Note:

The newly added software application Consistency Checker source code

that uses the options Patient Insurance Info View/Edit (PI)-->

Verify Coverage (VC) is now disabled ('commented out') so as to not use

the "Consistency Checker" source code to verify coverage. This feature

will be modified within future IB projects with instructions on how to

use this newly added Consistency Checker feature in conjunction with

the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

\*\*\*Note:

The host file "MCCF\_FY14\_HPID\_EIV\_1\_0.KID" contain two patches

(Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) that are bundled together

into this host file. The two patches are NOT DEPENDENT on each other.

After loading the distribution "MCCF\_FY14\_HPID\_EIV\_1\_0.KID" and

installing the distribution "MCCF FY14 HPID EIV 1.0", the installation

of BOTH patches (Eligibility IB\*2.0\*528 and HPID IB\*2.0\*525) will be

installed together AUTOMATICALLY.

\*\*\*Note:

When installing patch IB\*2.0\*528 answer "YES" at the following prompt:

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// YES

In general, the sites may have a background process that is jobbed off at

non-peak hours to Rebuild the Menu Trees. It is recommended that the

sites rebuild the Menu Trees (after the patch is installed and during

non-peak hours).

\*\*\*Note:

There are several data reports that when printing/displaying/exporting

the data it is recommended to use the 132 or 254 columns to

display/print/export. The users will receive a warning message in such a

case. It is recommended to have the users terminal emulation setting for

the 'auto-wrap' feature set to 'on'. This will allow the user to view

text on the next line when the user is entering/editing comment text

fields that extend past the end of the line.

System Sharing Verified Insurance (SSVI):

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

The Eligibility Benefits and Claims Status Data Content and

Infrastructure (Phase 2, Iteration 2) project task will utilize IB

Patient Insurance data stored in VA VistA databases residing on

approximately 134 VA VistA servers located at 129 VA Medical Centers.

There are approximately 750 current users of the IB Patient Insurance

application within the VA VistA databases.

Updates to the Patient Insurance data will be shared between VA VistA

sites both locally and nationally where the patient has been seen. Only

those sites that choose to turn on this option will receive the updated

Insurance information.

Note: A new user, AUTOUPDATE,IBEIV, will be created in the NEW PERSON

File (#200) during installation. When a patient's insurance is updated at

a receiving site, this user name will be the generic name showing that the

insurance was last updated or verified by the SSVI process.

The actual transmission of insurance information to other subscribers

shall be done in a batch processing fashion. This will be executed by a

background job that shall be tasked once a day.

The background job will search for patients who have had the flag to

transmit the patient's information set via user indication.

When the Background job runs, it will take the latest "snapshot" of the

patient's insurance information (all Active policies & plans, along with

all Medicare (M) plans).

After a user updates a patient Insurance record a trigger is initiated

that will at the end of the day create a global file containing the

updated patient Insurance. Those messages will only be sent to those

sites where that patient had visits.

A "consistency checker" to ensure all required sub-fields under the

Insurance Type multiple field (multiple field # .3121) in the Patient

(#2) file are complete before sending the information to other

facilities. A parameter, in the form of a VistA option, will be created

to allow each VA site to enable or disable this feature.

A user report can be run for sending and receiving patient insurance

information at a site.

SSVI - Data Source/Location(s):

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

The updated Insurance information will reside in the site's existing

VistA database where the patient has been seen and optionally transferred

to those subscribing VA sites via Remote Query. Those subscribing sites

will receive then store the updated information within their VA VistA

database until processed.

Three files have been created. IB INSURANCE CONSISTENCY ELEMENTS(#366.2)

contains the fields or categories to be checked for inconsistencies

following an editing session of the insurance edit option information.

IB INSURANCE INCONSISTENT DATA(#366.1) is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI

PIN/HL7 PIVOT(#366) is a storage area for all the remote query transaction

information.

The project will allow the processing/sending of updated patient

insurance information via Remote Query messaging. The user will set a

flag to have the option of transmitting any updated patient insurance

information.

Eligibility Benefits and Claims (Screens):

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

The Eligibility Benefits and Claims Status Data Content and

Infrastructure (Phase 2, Iteration 2) project task will create

enhancements to the VA VistA system utilizing the IB Version 2.0 software

application.

Enhancements will include the creation/modifications of existing

Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side

comparison of the Insurance Verification Processor buffer information

against the patient's Subscriber information found in either the Patient

File(#2) or the Income Person File (#408.13) depending on what the user

selects at the "Patient Relationship to Subscriber" prompt.

2. A newly created Annual Benefits screen will allow the user to

View/Edit/Save the patient annual benefits found within file (#355.4)

Annual Benefits File.

3. A newly created Coverage Limitations screen will allow the user

to View/Edit/Save the patient coverage limitations data found within file

(#355.32) Plan Coverage Limitations File.

4. Standardization of certain insurance subscriber display field names

from "Insured (Person)" or "Patient" to "Subscriber".

Security Key Updates:

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

Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV

AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as

appropriate.

2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE

PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER

LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.

3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the

IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN

INSURANCE CO EDIT option.

Eligibility Benefits and Claims (Patient Policy Information screen -

Comments):

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

Enhancements made to the patient policy comments displayed in the Patient

Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the

Patient Policy Information screen include:

a. Retrieval of comment data from the new COMMENT - SUBSCRIBER

POLICY multiple (2.312, 1.18).

b. Display of comments in Comment -- Patient Policy region.

Affected Options:

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

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient

Policy Information screen include:

a. Provides the capability for the user to enter up to 245

characters of comments

b. Provides the capability for the user to edit previously entered

comments entered on the same day

c. The user-entered comments, the date/time that the comment was

entered/edited, and the user ID (DUZ) gets stored in the respective

fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):

COMMENT DATE/TIME (2.342,.01)

LAST EDITED BY (2.342,.02)

COMMENT (2.342,.03)

d. Due to the authorized usage of the existing COMMENT PATIENT POLICY

field (2.312, 1.08) by other applications (ICRs), the old comment

field and the new comment multiple are to be populated until the

IA subscribers have made the necessary changes to their applications

to reference the new fields at the 2.312, 1.18 multiple. To that end

the following DD definitions were made:

a. Trigger cross-reference was defined to the COMMENT field (2.342,

.03) that will populate the COMMENT PATIENT POLICY field (2.312,

1.08) when data is entered/edited at the COMMENT field (2.342,

.03).

b. Mumps cross-reference was defined to the COMMENT PATIENT POLICY

field (2.312, 1.08) that will populate the fields at the COMMENT

SUBCRIBER POLICY multiple only when both the old and the new

comment field is different.

Affected Options:

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

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Reports:

--------

Several new reports will be added to the IB menus and existing reports

will be updated.

1. A new report will be created to capture Group Plans without annual

benefits for a requested year.

2. An audit report will be created to monitor changes to four IB

insurance-related files.

3. A new report will be created to capture outgoing and incoming HL7

messages between VistA and the Financial Services Center (FSC).

4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will

be added to the eIV Payer Link Report. (The "HPID/OEID" field was added

in IB\*2.0\*521.)

5. A new submenu will be created to display all insurance-related

reports under one menu.

6. IB reports will be enhanced to enable output to Excel spreadsheets.

Patch Components

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

Files & Fields Associated:

File Name (#) Field Name (#) New/Modified/Deleted

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

PATIENT FILE (#2)

INSURANCE TYPE (sub-file)(#2.312)

COMMENT-PATIENT POLICY (1.08) Modified

COMMENT - SUBSCRIBER POLICY New

(sub-file)(#2.342)

INSURANCE COMPANY (#36)

NAME (#.01) Modified

INACTIVE (#.05)

STREET ADDRESS [LINE 1] Modified

(#.111)

STREET ADDRESS [LINE 2] Modified

(#.112)

REIMBURSE? (#1) Modified

PAYER (#3.1) Modified

IB SITE PARAMETERS (#350.9)

IBCN SSVI DISABLE/ENABLE (#100) New

IBCN SSVI LAST INS DATE XFER New

(#101)

IBCN CURRENT PIVOT ENTRY (#102) New

IBCN PIVOT FILE DAYS TO RETAIN New

(#103)

TYPE OF PLAN (#355.1)

NAME (#.01) Modified

ABBREVIATION (#.02) Modified

GROUP INSURANCE PLAN (#355.3)

PLAN STANDARD FTF (#.16) Modified

PLAN STANDARD FTF VALUE (#.17) Modified

GROUP NAME (#2.01) Modified

GROUP NUMBER (#2.02) Modified

INSURANCE VERIFICATION PROCESSOR (#355.33)

SUBSCRIBER PHONE New

(#62.09)

IB SSVI PIN/HL7 PIVOT (#366) New

IB INSURANCE INCONSISTENT DATA (#366.1) New

IB INSURANCE CONSISTENCY ELEMENTS (#366.2) New

Forms Associated:

Form Name File # New/Modified/Deleted

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

N/A

Mail Groups Associated:

Mail Group Name New/Modified/Deleted

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

IB SSVI New

Options Associated:

Option Name Type New/Modified/Deleted

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

IBCN INSURANCE MGMT MENU menu Modified

IBCN INS RPTS menu New

IBCN GRP PLAN FILES RPT run routine New

IBCN INTERFACILITY INS UPDATE run routine New

IBCN USER EDIT RPT run routine New

IBCN ID DUP INSURANCE ENTRIES run routine Modified

IBCN LIST INACTIVE INS W/PAT run routine Modified

IBCN LIST NEW NOT VER run routine Modified

IBCN LIST PLANS BY INS CO run routine Modified

IBCN NO COVERAGE VERIFIED run routine Modified

IBCN OUTPUT INS BUFF ACTIVITY run routine Modified

IBCN OUTPUT INS BUFF EMPLOYEE run routine Modified

IBCN POL W/NO EFF DATE REPORT run routine Modified

IBCN PT W/WO INSURANCE REPORT run routine Modified

IBCNE EIV UPDATE REPORT run routine Modified

IBCNE HL7 RESPONSE REPORT run routine New

IBCNE IIV PAYER LINK REPORT run routine Modified

IBCNE IIV PAYER REPORT run routine Modified

IBCNE IIV RESPONSE REPORT run routine Modified

IBCNE IIV STATISTICAL REPORT run routine Modified

IBCNE POTENTIAL NEW INS FOUND menu Modified

IBCNE IIV MENU menu Modified

IBJD INTAKE INS run routine Modified

IBJD INTAKE POL NOT VER run routine Modified

IB INPATIENT VET REPORT run routine Modified

IB OUTPATIENT VET REPORT run routine Modified

IB OUTPUT INPTS WITHOUT INS run routine Modified

IB OUTPUT OPTS WITHOUT INS run routine Modified

IB OUTPUT PRE-REG SOURCE REPT run routine Modified

IB OUTPUT TREND REPORT run routine Modified

IBCEM PATIENTS W/O MEDICARE run routine Modified

Protocols Associated:

Protocol Name New/Modified/Deleted

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

IBCNB LIST SCREEN MENU Modified

IBCNB LIST TRICARE/CHAMPVA VIEW New

Security Keys Associated:

Security Key Name

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

IBCNE IIV AUTOMATCH

Templates Associated:

Template Name

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

Type File Name (#) New/Modified/Deleted

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

IB SSVI PIVOT

Print IB SSVI PIN/HL7 PIVOT (#366) New

IB SSVI PIVOT B

Print IB SSVI PIN/HL7 PIVOT (#366) New

IB SSVI PIVOT

Sort IB SSVI PIN/HL7 PIVOT (#366) New

IB SSVI PIVOT B

Sort IB SSVI PIN/HL7 PIVOT (#366) New

IB SSVI ENABLE/DISABLE

Input IB SITE PARAMETERS (#350.9) New

IBCNE GENERAL PARAMETER EDIT

Input IB SITE PARAMETERS (#350.9) Modified

IBCN PATIENT INSURANCE

Input PATIENT (#2) Modified

IBCNBC CV IP EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCNBC CV OP EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCNBC CV DN EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCNBC CV MH EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCNBC CV LT EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCNBC CV PH EDIT

Input PLAN COVERAGE LIMITATIONS(#355.32) New

IBCN AB ACCEPT

Input ANNUAL BENEFITS (#355.4) New

IBCNB INSURANCE BUFFER PROCESS

List INSURANCE VERIFICATION PROCESSOR Modified

(#355.33)

Remote Procedures Associated:

Remote Procedure Name New/Modified/Deleted

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IBCN SSVI ENABLED New

IBCN SSVI SEND New

Additional Information:

N/A

New Service Requests (NSRs):

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180833

20110215

20120118

Patient Safety Issues (PSIs):

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N/A

Remedy Ticket(s) & Overviews:

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N/A

Test Sites:

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Dayton VAMC - Station 552

Lebanon VA Medical Center - Station 595

Martinsburg VA Medical Center - Station 613

Central Alabama HCS - Station 619

Documentation Retrieval Instructions:

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Software being released as a host file and/or documentation describing

the new functionality introduced by this patch are available.

The preferred method is to retrieve files from download.vista.med.va.gov.

This transmits the files from the first available server. Sites may

also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using

Secure 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

Documentation can also be found on the VA Software Documentation Library

at: http://www4.va.gov/vdl/

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

File Description File Name FTP Mode

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

Integrated Billing User Manual IB\_2\_0\_UM.PDF (binary)

Integrated Billing Technical Manual/ IB\_2\_0\_TM.PDF (binary)

Security Guide

Integrated Billing Release Notes IB\_2\_0\_P528\_RN.PDF (binary)

Electronic Insurance Verification (eIV) IB\_2\_0\_EIV\_TM.PDF (binary)

Technical Manual/Security Guide

Electronic Insurance Verification IB\_2\_0\_EIV\_UG.PDF (binary)

User Manual

## Pre/Post Installation Overview

The post-install routine, IBY528PO, will perform the following:

1. The name of the IBCNE IIV AUTO MATCH key will be changed to IBCNE

EIV MAINTENANCE.

2. The IBCNE EIV MAINTENANCE key will be used to lock the following menu

options in place of the current IB INSURANCE SUPERVISOR lock:

IBCNE PAYER MAINTENANCE MENU

IBCNE PAYER EDIT

IBCNE PAYER LINK

3. The IBCNE EIV MAINTENANCE key be used to lock the Payer action (PA)

action on the IBCN INSURANCE CO EDIT screen.

4. Retrieves all historical comment data stored at (2.312,1.18) and stores

to the following new location:

COMMENT SUBSCRIBER POLICY multiple (2.312,1.18) :

COMMENT DATE/TIME (2.342,.01) = start date/time of the post-install

LAST EDITED BY (2.342,.02) = postmaster DUZ

COMMENT (2.342,.03) = value stored at 2.312, 1.08

## Installation Instructions

This patch may be installed with users on the system although it is

recommended that it be installed during non-peak hours to minimize

potential disruption to users. This patch should take less than 35 minutes

to install depending on the sites current system workload volume

during the time of the install depending on the sites current system workload volume during the time of the install.

1. OBTAIN PATCHES

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

Obtain the host file MCCF\_FY14\_HPID\_EIV\_1\_0.KID, which contains the

following patches:

IB\*2.0\*528

IB\*2.0\*525

Sites can retrieve VistA software from the following FTP addresses.

The preferred method is to FTP the file from:

download.vista.med.va.gov

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.fo-albany.med.va.gov

Hines ftp.fo-hines.med.va.gov

Salt Lake City ftp.fo-slc.med.va.gov

The MCCF\_FY14\_HPID\_EIV\_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 THE TRANSPORT GLOBAL

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

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 MCCF\_FY14\_HPID\_EIV\_1\_0.KID (e.g.,

SYS$SYSDEVICE:[ANONYMOUS]MCCF\_FY14\_HPID\_EIV\_1\_0.KID).

When prompted for "OK to continue with Load? YES//", enter "YES."

The following will display:

Loading Distribution...

IB\*2.0\*528

IB\*2.0\*525

Use INSTALL NAME: MCCF FY14 HPID EIV 1.0 to install this

Distribution.

4. RUN OPTIONAL INSTALLATION OPTIONS

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

From the Installation menu, you may select to use the following

options (when prompted for the INSTALL NAME, enter MCCF FY14 HPID

EIV 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 THE PATCH

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

This is the step to start the installation of this KIDS patch. This

will need to be run for the MCCF FY14 HPID EIV 1.0.

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

install.

b. When prompted for the "Select INSTALL NAME:", enter MCCF FY14

HPID EIV 1.0.

c. When prompted for " Enter the Coordinator for Mail Group 'IB

SSVI':" enter the name of a person that will be responsible

(COORDINATOR) for maintaining the membership of the IB SSVI mail

group. \*\*\*See Note for IB SSVI mail group.

d. When prompted "Want KIDS to Rebuild Menu Trees Upon Completion of

Install? NO//", enter NO.

e. When prompted "Want KIDS to INHIBIT LOGONs during the install?

NO//", enter NO.

f. When prompted " Want to DISABLE Scheduled Options, Menu Options,

and Protocols? NO//", enter NO.

g. When prompted "Device: HOME//", respond with the correct device

but do \* NOT \* queue this install.

h. 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

check the Mailman message that was created. 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 164

The checksums below are new checksums, and

can be checked with CHECK1^XTSUMBLD.

Routine Name: IBCEMMR

Before: B48738467 After: B56465782 \*\*155,366,528\*\*

Routine Name: IBCN118

Before: n/a After: B9899730 \*\*528\*\*

Routine Name: IBCNAU

Before: n/a After: B50832462 \*\*528\*\*

Routine Name: IBCNAU1

Before: n/a After: B17152074 \*\*528\*\*

Routine Name: IBCNAU2

Before: n/a After: B24403828 \*\*528\*\*

Routine Name: IBCNAU3

Before: n/a After: B12671484 \*\*528\*\*

Routine Name: IBCNBAA

Before: B75234738 After: B170357032 \*\*82,184,246,416,506,528\*\*

Routine Name: IBCNBAC

Before: B51549169 After: B53121470 \*\*184,497,528\*\*

Routine Name: IBCNBAR

Before: B44889067 After: B51423558 \*\*82,240,345,413,416,497,528\*\*

Routine Name: IBCNBCD

Before: B99276499 After: B99061672 \*\*82,251,361,371,416,438,452,

497,528\*\*

Routine Name: IBCNBCD1

Before: n/a After: B94125626 \*\*528\*\*

Routine Name: IBCNBCD2

Before: n/a After: B204932472 \*\*528\*\*

Routine Name: IBCNBCD3

Before: n/a After: B116960368 \*\*528\*\*

Routine Name: IBCNBCD4

Before: n/a After: B43901770 \*\*528\*\*

Routine Name: IBCNBCD5

Before: n/a After: B137684111 \*\*528\*\*

Routine Name: IBCNBCD6

Before: n/a After: B134178322 \*\*528\*\*

Routine Name: IBCNBCD7

Before: n/a After: B7325705 \*\*528\*\*

Routine Name: IBCNBEE

Before: B45711543 After: B50211933 \*\*82,184,252,251,356,361,371,

377,416,438,452,497,528\*\*

Routine Name: IBCNBLA1

Before:B100917255 After:B104276372 \*\*82,133,149,184,252,271,416,

438,506,528\*\*

Routine Name: IBCNBLE

Before:B108261560 After:B108286905 \*\*82,231,184,251,371,416,435,

452,497,519,516,528\*\*

Routine Name: IBCNBLL

Before:B139954762 After:B144703884 \*\*82,149,153,183,184,271,345,

416,438,435,506,519,528\*\*

Routine Name: IBCNBMI

Before: B91864404 After: B96670788 \*\*82,184,246,251,299,345,361,

371,413,416,438,452,497,528\*\*

Routine Name: IBCNBOA

Before: B46681109 After: B66757822 \*\*82,305,528\*\*

Routine Name: IBCNBOE

Before: B81017950 After: B109925669 \*\*82,528\*\*

Routine Name: IBCNBOF

Before: B25012565 After: B32265412 \*\*82,528\*\*

Routine Name: IBCNEDE1

Before: B44623085 After: B48194062 \*\*184,271,416,438,435,467,497,528\*\*

Routine Name: IBCNERP1

Before: B79692188 After: B87784206 \*\*184,271,416,528\*\*

Routine Name: IBCNERP2

Before: B30801647 After: B31175764 \*\*184,271,416,528\*\*

Routine Name: IBCNERP3

Before: B28161597 After: B77649111 \*\*184,271,416,528\*\*

Routine Name: IBCNERP4

Before: B61656289 After: B65437129 \*\*184,271,300,416,528\*\*

Routine Name: IBCNERP6

Before: B74223457 After: B98862424 \*\*184,271,416,528\*\*

Routine Name: IBCNERP7

Before: B26715367 After: B30436149 \*\*184,416,528\*\*

Routine Name: IBCNERP9

Before:B103562066 After: B133982311 \*\*184,271,416,506,528\*\*

Routine Name: IBCNERPA

Before: B6564371 After: B7366399 \*\*184,271,345,416,528\*\*

Routine Name: IBCNERPB

Before: B47288196 After: B48231865 \*\*184,252,271,416,528\*\*

Routine Name: IBCNERPC

Before: B46095484 After: B55318393 \*\*184,252,271,416,528\*\*

Routine Name: IBCNERPD

Before: B67426555 After: B108873361 \*\*184,252,416,521,528\*\*

Routine Name: IBCNERPF

Before: B16361185 After: B17142142 \*\*416,528\*\*

Routine Name: IBCNERPG

Before: B15534927 After: B15763271 \*\*416,528\*\*

Routine Name: IBCNERPH

Before: B19008482 After: B26306975 \*\*416,528\*\*

Routine Name: IBCNERPJ

Before: n/a After: B18323199 \*\*528\*\*

Routine Name: IBCNERPK

Before: n/a After: B9770810 \*\*528\*\*

Routine Name: IBCNERPL

Before: n/a After: B21072359 \*\*528\*\*

Routine Name: IBCNGPF

Before: n/a After: B21375238 \*\*528\*\*

Routine Name: IBCNGPF1

Before: n/a After: B16592637 \*\*528\*\*

Routine Name: IBCNGPF2

Before: n/a After: B19487325 \*\*528\*\*

Routine Name: IBCNGPF3

Before: n/a After: B8501170 \*\*528\*\*

Routine Name: IBCNICB

Before:B106011881 After:B129151607 \*\*413,416,528\*\*

Routine Name: IBCNSM

Before: B22946232 After: B23601352 \*\*28,46,56,52,82,103,199,276,

435,528\*\*

Routine Name: IBCNSM2

Before: B21200856 After: B23942735 \*\*28,103,139,516,528\*\*

Routine Name: IBCNSM4

Before: B3479873 After: B4086996 \*\*56,82,199,276,528\*\*

Routine Name: IBCNSP

Before: B49297563 After: B79133086 \*\*6,28,43,52,85,251,363,371,

416,497,516,528\*\*

Routine Name: IBCNSP0

Before: B38008161 After: B45681848 \*\*28,43,52,85,93,103,137,229,

251,363,371,399,438,458,497,

516,528\*\*

Routine Name: IBCNSP3

Before: B38854605 After: B85952229 \*\*28,52,85,251,371,497,528\*\*

Routine Name: IBCNVCC

Before: n/a After: B19887877 \*\*528\*\*

Routine Name: IBCNVCC1

Before: n/a After: B13802423 \*\*528\*\*

Routine Name: IBCNVPU0

Before: n/a After: B30762326 \*\*528\*\*

Routine Name: IBCNVRD0

Before: n/a After:B157582204 \*\*528\*\*

Routine Name: IBCNVRD1

Before: n/a After:B219042298 \*\*528\*\*

Routine Name: IBCNVRP0

Before: n/a After: B26970383 \*\*528\*\*

Routine Name: IBCNVRP1

Before: n/a After: B26005231 \*\*528\*\*

Routine Name: IBCNVRP2

Before: n/a After: B107004778 \*\*528\*\*

Routine Name: IBCNVUT0

Before: n/a After: B99101857 \*\*528\*\*

Routine Name: IBCOC

Before: B1268279 After: B14081123 \*\*528\*\*

Routine Name: IBCOC1

Before: B1383231 After: B21404907 \*\*528\*\*

Routine Name: IBCOMA

Before: B21266517 After: B24000522 \*\*103,528\*\*

Routine Name: IBCOMA1

Before: B34536686 After: B45473488 \*\*103,516,528\*\*

Routine Name: IBCOMC

Before: B25360036 After: B28290447 \*\*103,528\*\*

Routine Name: IBCOMC1

Before: B16846008 After: B19172785 \*\*103,183,528\*\*

Routine Name: IBCOMC2

Before: B12669229 After: B15997269 \*\*103,153,516,528\*\*

Routine Name: IBCOMD

Before: B34794130 After: B38054448 \*\*103,528\*\*

Routine Name: IBCOMD1

Before: B21770147 After: B27677991 \*\*103,528\*\*

Routine Name: IBCOMN

Before: B11550204 After: B13731474 \*\*103,528\*\*

Routine Name: IBCOMN1

Before: B10839800 After: B14298599 \*\*103,528\*\*

Routine Name: IBCONS1

Before: B79511698 After: B125225379 \*\*66,80,137,516,528\*\*

Routine Name: IBCONSC

Before: B15130560 After: B17158899 \*\*66,120,528\*\*

Routine Name: IBCOPP

Before: B14149734 After: B15985691 \*\*28,62,528\*\*

Routine Name: IBCOPP1

Before: B9186592 After: B10507720 \*\*28,528\*\*

Routine Name: IBCOPP2

Before: B20749250 After: B22994194 \*\*28,62,93,516,528\*\*

Routine Name: IBCOPP3

Before: B10453963 After: B15474438 \*\*28,516,528\*\*

Routine Name: IBCOPR

Before: B34320642 After: B37055885 \*\*75,345,528\*\*

Routine Name: IBCOPR1

Before: B32793618 After: B58373479 \*\*75,345,528\*\*

Routine Name: IBJDI4

Before: B27931040 After: B31792499 \*\*69,98,100,118,528\*\*

Routine Name: IBJDI41

Before: B83815230 After:B150223354 \*\*98,100,118,528\*\*

Routine Name: IBJDI5

Before: B65839451 After: B97543922 \*\*69,98,100,118,123,528\*\*

Routine Name: IBJPI

Before: B19548396 After: B21646408 \*\*184,271,316,416,438,479,506,528\*\*

Routine Name: IBOTR1

Before: B19679785 After: B22387130 \*\*21,42,72,100,118,128,528\*\*

Routine Name: IBOTR3

Before: B31663645 After: B51841072 \*\*42,80,100,118,128,133,447,516,528\*\*

Routine Name: IBOUNP1

Before: B15243221 After: B17878634 \*\*249,528\*\*

Routine Name: IBOUNP3

Before: B22364020 After: B37406205 \*\*249,528\*\*

Routine Name: IBOUNP4

Before: B12652607 After: B13529081 \*\*528\*\*

Routine Name: IBOUNP6

Before: B21711406 After: B36369758 \*\*528\*\*

Routine Name: IBY528PA

Before: n/a After: B92379813 \*\*528\*\*

Routine Name: IBY528PO

Before: n/a After: B23902545 \*\*528\*\*

# 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

### SSVI - Data Source/Location

The updated insurance information will reside in the site's existing VistA database where the patient has been seen and optionally transferred to those subscribing VA sites via Remote Query. Those subscribing sites will receive then store the updated information within their VA VistA database until processed.

Three files have been created. IB INSURANCE CONSISTENCY ELEMENTS (#366.2) contains the fields or categories to be checked for inconsistencies following an editing session of the insurance edit option information. IB INSURANCE INCONSISTENT DATA (#366.1) is a storage area for all the fields or categories that have been recently found to be inconsistent. IB SSVI PIN/HL7 PIVOT (#366) is a storage area for all the remote query transaction information.

The project will allow the processing/sending of updated patient insurance information via Remote Query messaging. The user will set a flag to have the option of transmitting any updated patient insurance information.

\*\*\*Note:

The newly added software application System Sharing Verified Insurance (SSVI) Parameter in the eIV Site Parameters is set to OFF during the install. DO NOT TURN SSVI ON. This patch will install all necessary source code, data dictionaries, options, templates etc. for the SSVI application, however, this feature should be set to OFF so as to not initiate the SSVI feature. This feature will be modified in future IB projects with instructions on how to use this newly added feature.

\*\*\*Note:

The newly added software application Consistency Checker source code that uses the options Patient Insurance Info View/Edit (PI)--> Verify Coverage (VC) is now disabled ('commented out') so as to not use the "Consistency Checker" source code to verify coverage. This feature will be modified within future IB projects with instructions on how to use this newly added Consistency Checker feature in conjunction with the SSVI feature. DO NOT ENABLE THE SSVI UTILITY.

### Eligibility Benefits and Claims Screens

The Eligibility Benefits and Claims Status Data Content and Infrastructure (Phase 2, Iteration 2) project task will create enhancements to the VA VistA system utilizing the IB Version 2.0 software application.

Enhancements will include the creation/modifications of existing Insurance screens/menus/options/templates/files.

1. A newly created Subscriber screen will display a side-by-side comparison of the Insurance Verification Processor buffer information against the patient's Subscriber information found in sub-file (#2.312) Insurance Type File of the Patient File (#2).
2. A newly created Annual Benefits screen will allow the user to View/Edit/Save the patient annual benefits found within file (#355.4) Annual Benefits File.
3. A newly created Coverage Limitations screen will allow the user to View/Edit/Save the patient coverage limitations data found within file (#355.32) Plan Coverage Limitations File.
4. Standardization of certain insurance subscriber display field names from "Insured (Person)" or "Patient" to "Subscriber".

### Security Key Updates

Updates will be made to IB Insurance security keys.

1. The post-install routine for this patch will rename the IBCNE IIV AUTOMATCH security key to IBCNE EIV MAINTENANCE and assign it as appropriate.
2. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNE PAYER MAINTENANCE MENU and its options IBCNE PAYER EDIT and IBCNE PAYER LINK, replacing the IB INSURANCE SUPERVISOR lock on these options.
3. The renamed IBCNE EIV MAINTENANCE key will be assigned to the IBCNSC INS CO PAYER protocol, i.e., the Payer Action (PA) on the IBCN INSURANCE CO EDIT option.

### Eligibility Benefits and Claims Patient Policy Information Screen – Comments

Enhancements made to the patient policy comments displayed in the Patient Policy Screens.

Option: Patient Insurance Info/Edit (PI)

Software modifications made to the VP View Policy action located on the

Patient Policy Information screen include:

1. Retrieval of comment data from the new COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18).
2. Display of comments in Comment -- Patient Policy region.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

Software modifications made to the AC Add Comment action on the Patient Policy Information screen include:

* 1. Provides the capability for the user to enter up to 250 characters of comments
  2. Provides the capability for the user to edit previously entered comments entered on the same day
  3. The user-entered comments, the date/time that the comment was entered/edited, and the user ID (DUZ) gets stored in the respective fields of the COMMENT - SUBSCRIBER POLICY multiple (2.312, 1.18):

COMMENT DATE/TIME (2.342,.01)

LAST EDITED BY (2.342,.02)

COMMENT (2.342,.03)

* 1. Due to the authorized usage of the existing COMMENT PATIENT POLICY field (2.312, 1.08) by other applications (ICRs), the old comment field and the new comment multiple are to be populated until the IA subscribers have made the necessary changes to their applications to reference the new fields at the 2.312, 1.18 multiple. To that end the following DD definitions were made:
  2. Trigger cross-reference was defined to the COMMENT field (2.342, .03) that will populate the COMMENT PATIENT POLICY field (2.312, 1.08) when data is entered/edited at the COMMENT field (2.342, .03).
  3. Mumps cross-reference was defined to the COMMENT PATIENT POLICY field (2.312, 1.08) that will populate the fields at the COMMENT SUBCRIBER POLICY multiple only when both the old and the new comment field is different.

Affected Options:

Patient Insurance Info/Edit [IBCN PATIENT INSURANCE]

Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]

View Patient Insurance [IBCN VIEW PATIENT INSURANCE]

Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]

### Reports

Several new reports will be added to the IB menus and existing reports will be updated.

1. A new report will be created to capture Group Plans without annual benefits for a requested year.
2. An audit report will be created to monitor changes to four IB insurance-related files.
3. A new report will be created to capture outgoing and incoming HL7 messages between VistA and the Financial Services Center (FSC).
4. Two new fields, "FSC Trusted?" and "Number of Active Groups", will be added to the eIV Payer Link Report. (The "HPID/OEID" field was added in IB\*2.0\*521.)
5. A new submenu will be created to display all insurance-related reports under one menu.
6. IB reports will be enhanced to enable output to Excel spreadsheets.

## Issue Resolutions

### New Service Requests (NSRs)

This patch is associated with the following NSRs:

* 180833
* 20110215
* 20120118

### Remedy Tickets

There are no Remedy Tickets associated with this patch.