

# STAR 2000™



## STAR FINANCIALS PATIENT ACCOUNTING REFERENCE GUIDE

Horizon<sup>WP</sup>® Patient Portal Interface Guide

Release 17.0  
October 2011

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# Preface

The *STAR Financials Patient Accounting Reference Guide* is a multivolume document written for all users of the STAR Financials Patient Accounting System. This volume provides detailed information about the interface between STAR Financials Patient Accounting and the Horizon<sup>WP®</sup> Patient Portal.



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# Documentation Conventions

Documentation for McKesson's STAR 2000™ line of products follows these conventions:

## Revisions

Text revisions are indicated by a change bar in the left margin. Paragraphs that contain grammatical changes that do not affect content are not marked.

## Canadian Documentation

This volume may include documentation for Canadian users of this product. Complete sections of Canadian text are identified by "CN" and "CN Only."

## Key Names

Named keys, such as ENTER, SHIFT, CTRL, and ALT, appear in this document in uppercase (capital) letters. Symbol keys display according to the key name, followed by the symbol on the key in parentheses, such as hyphen (-) and asterisk (\*).

## Key Chords

Key chords are key entries that require you to hold down one or more keys (typically, CTRL, ALT, or SHIFT) before pressing another key. In this document, key chords display as the names of each key in the chord with a hyphen (-) between each (for example, CTRL-ALT-DEL). You should press the keys in the order indicated.

## ENTER

ENTER is a key on a computer keyboard used to complete an entry on a STAR system. (This key may also be referred to as NEW LINE or NL in the STAR system.)

## Data Entries

Letters or words you enter in response to the system display in **boldface** letters in this document. For example: Enter **Y** for Yes or **N** for No.

## Selecting an Entry

This document often instructs you to "select an entry." The method you use to select an entry depends on whether you are using STAR from a terminal or IBM-compatible personal computer. Entry methods include:

- Entering the option number
- Using your arrow keys to highlight the option and pressing ENTER
- Clicking on the option using a mouse or other pointing device (PC only)

For more information about these options, see the *General Information Volume*.

## Prompts

System prompts display at the bottom of many STAR screens when the system requests an entry or displays a message. Prompts display in this document italicized and indented from the rest of the text. For example:

*Enter patient name--*

### Field Characteristics

STAR product documentation provides field explanation codes, in addition to a narrative description for each field on a screen. These codes display the maximum length of your entry in the field, the type of entry you make in the field, and whether the field is required. This information displays in the following format:

- DISPLAY ONLY for a field you cannot edit.
- For X-YY-Z field types, where:
  - X is the maximum number of characters permitted in the field:
    - P for a field length determined by a Parameter
    - T for a field length determined by a Table
    - U for a field having an Undefined length
  - YY is the type of entry technique permitted in the field:
    - A for Letters only
    - N for Numerals only
    - C for Characters (including punctuation)
    - AC for Letters and Punctuation only (no numbers)
    - NC for Numerals and Punctuation only (no letters)
    - AN for Numerals and Letters only (no punctuation)
  - Z is the requirement indicator of the field:
    - R if an entry is required to complete the function
 

**NOTE:** Facilities can designate that certain fields be Required. STAR product documentation does not display R for fields designated as Required by a facility.
    - O if an entry is Optional to complete the function
    - C if an entry is Conditionally required or optional
  - For YY-Z field types, where YY is:
    - TABLE LOOKUP for a field that enables you to select from a displayed table. See the *General Information Volume* for more information regarding this entry technique.
    - SPECIAL FORMAT for a field having data entry requirements not conforming to standard format. The field definition contains the specific data entry requirements for the field.
    - DATE for a field subject to the date entry conventions described in the *General Information Volume*.
    - TIME for a field subject to the time entry conventions described in the *General Information Volume*.

**NOTE:** For use of the Z position in this format, refer to the explanations for Z under X-YY-Z.

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# Introduction

This document contains a detailed explanation of the Horizon<sup>WP</sup> Patient Portal interface. This manual contains the following chapter:

## **Chapter 1: Using the Interface**

This chapter discusses parameter setup for the interface and error reporting.



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## INTRODUCTION

**NOTE:** The Horizon<sup>WP</sup> Patient Portal interface functions on your system only if you have purchased the Account Management application of the Horizon<sup>WP</sup> Patient Portal.

The Horizon<sup>WP</sup> Patient Portal Account Management Interface allows STAR Financials Patient Accounting to send and receive data from the Horizon<sup>WP</sup> Patient Portal Account Management application.

The cash batches that are generated in STAR Patient Accounting as a result of the Horizon<sup>WP</sup> Patient Portal Interface should have only four- digit batch identification numbers. The field length for cash batches on STAR Patient Accounting accommodates the four-digit Horizon<sup>WP</sup> Patient Portal Account Management cash batches. The batch identification numbers for the Horizon<sup>WP</sup> Patient Portal Account Management batches have a value of 1000 to 9999 and are always automatically assigned by the system.

The STAR Patient Accounting system processes account-related services provided in Horizon<sup>WP</sup> Patient Portal Account Management as listed below:

- Ask a General Billing Question

This option doesn't log anything on STAR Financials Patient Accounting. Please refer to the Horizon<sup>WP</sup> Patient Portal user documentation for more information on this function.

- Re-Bill Insurance Request

This option doesn't log anything on STAR Financials Patient Accounting. Please refer to the Horizon<sup>WP</sup> Patient Portal user documentation for more information on this function.

- Payment Plan Request

This option doesn't log anything on STAR Financials Patient Accounting. Please refer to the Horizon<sup>WP</sup> Patient Portal documentation for more information on this function.

- Request a Detail Bill

This option spools a demand bill on STAR Financials Patient Accounting under the spoolfile called FBR901, Demand Patient Bills. A transaction history log is created when a demand bill is requested by a community member through the Horizon<sup>WP</sup> Patient Portal Interface. The type of demand bill that is spooled through the

interface is controlled by parameters on Horizon<sup>WP</sup> Patient Portal. Please refer to the Horizon<sup>WP</sup> Patient Portal user documentation for more information on this function.

## Audit Transaction History

STAR Financials Patient Accounting generates an audit transaction history whenever a community member views an account through Horizon<sup>WP</sup> Patient Portal Account Management. The transaction code that is used to log this event in transaction history is set up through the Horizon<sup>WP</sup> Patient Portal Account Management application. STAR Financials Patient Accounting uses the transaction code that is associated with the Retrieve Account Transaction Code parameter. Please review the Horizon<sup>WP</sup> Patient Portal documentation for more information on defining this transaction code.

STAR Financials Patient Accounting generates an audit transaction history whenever a community member requests a bill through the Horizon<sup>WP</sup> Patient Portal Account Management module. The transaction code that is used to log this event in transaction history is set up through Horizon<sup>WP</sup> Patient Portal Account Management. STAR Financials Patient Accounting uses the transaction code that is associated with the Demand Bill Transaction Code parameter. Please see the Horizon<sup>WP</sup> Patient Portal documentation for more information on where to define this transaction code.

## Reporting

The cash batches that are generated in STAR Financials Patient Accounting as a result of the Horizon<sup>WP</sup> Patient Portal Account Management interface appear in the Cash Posting Detail Report (FAR130). For information on that report, see the *Reports Volume* of the *STAR Financials Patient Accounting Reference Guide*.

Errors that result in interface processing are reported on the HCP Application Interface Error Report (FWR100). For information on error reporting, refer to “[HCP Application Interface Error Report \(FWR100\)](#)” on page 1-10.



## PARAMETERS SETUP

When you select Interface Functions, then HCP Account Management, from the Financial Management menu, the system displays the following menu:

```

General Hospital HCP Account Management Processor
                                Fri Aug 16, 2003 01:40 pm
HCP Account Management Input Options

Option No.  Option
-----
      1      HCP Acct Mgmt Credit Card Options
      2      Print HCP Acct Mgmt Credit Card Cash

Enter option number-- 1

```

Each of the options is discussed below.

### HCP Account Management Credit Card Options

This option is used to define STAR Financials Patient Accounting credit card cash parameters related to the Horizon<sup>WP</sup> Patient Portal batches. After you select HCP Acct Mgmt Credit Card Options and enter a facility, the following screen is displayed:

```

General Hospital HCP Acct Mgmt Credit Card Options Processor
                                Fri Aug 16, 2003 01:41 pm

1 Credit Card Batch Description      2 Maximum Batch Size
  HCP ACCT MGMT CREDIT CARD BATCH    Unlimited
3 Transaction Code/Description
  P0003-PERSONAL PAYMENT-VISA
4 Last Edit Date                    5 Last Edit By

6 Current Batch Number              7 Current Batch Size  8 Current Batch Total
  Waiting for next transaction        0                  $0.00
9 Last Batch Number                 10 Average Post Size  11 Average Post Time
                                      0                  0.00 Minutes
12 Batch Retention Days
   30

Enter transaction code, or '-' for list -- |

```

### Field Explanations

#### 1. CREDIT CARD BATCH DESCRIPTION (30-AN-R)

This field contains a description of the credit card batch. When the field is accessed, the following prompt is displayed:

*Enter new credit card batch description --*

The default is the McKesson-defined description of the Horizon<sup>WP</sup> Patient Portal Acct Mgmt credit card cash batch. You can modify the description by entering a new description.

## **2. MAXIMUM BATCH SIZE (5-N-R)**

This field contains the maximum number of Horizon<sup>WP</sup> Patient Portal Account Management Credit Card Cash Batch entries allowed before a batch is automatically posted by the system. When this field is accessed, the following prompt is displayed:

*Enter new maximum batch size prior to posting ['U'nlmited]--*

Valid values for this field are 1 through 99999 or U for Unlimited. The system automatically posts an HCP Account Management Credit Card Cash Batch whenever the maximum is met during the day and opens another cash batch. New entries should be added to the open batch. If a batch does not reach its maximum before Midnight Processing begins for the day, the cash batch posts during Midnight Processing.

## **3. TRANSACTION CODE/DESCRIPTION (TABLE LOOKUP OR 4-N-R)**

This field contains the transaction code and description that is used to update the transaction history for each account in a Horizon<sup>WP</sup> Patient Portal batch when the batch is posted. This field contains the transaction code that is associated with a **P** transaction type. If a valid transaction code is not entered in this field, credit card payments made through Horizon<sup>WP</sup> Patient Portal cannot be processed on STAR.

You can enter a transaction code with a transaction type of P in this field or enter a hyphen (-) to look up a list of available codes.

## **4. LAST EDIT DATE (DISPLAY ONLY)**

This field contains the date the table was last updated.

## **5. LAST EDIT BY (DISPLAY ONLY)**

This field contains the name of the person who last updated the table.

## **6. CURRENT BATCH NUMBER (DISPLAY ONLY)**

This field contains the batch number that is currently open. If there is not a current open batch, the system displays the following message:

*Waiting for next transaction*

When a payment is posted through the Horizon<sup>WP</sup> Patient Portal Account Management interface, a batch is automatically opened by the STAR system, and this field contains the batch number.

## **7. CURRENT BATCH SIZE (DISPLAY ONLY)**

This field contains the current batch size.

**8. CURRENT BATCH TOTAL (DISPLAY ONLY)**

This field contains the current batch total.

**9. LAST BATCH NUMBER (DISPLAY ONLY)**

This field contains the batch number for the last Horizon<sup>WP</sup> Patient Portal Account Management Credit Card batch.

**10. AVERAGE POST SIZE (DISPLAY ONLY)**

This field contains the average size of all Horizon<sup>WP</sup> Patient Portal Account Management Credit Card batches posted within the last 30 days.

**11. AVERAGE POST TIME (DISPLAY ONLY)**

This field contains the average post time of all Horizon<sup>WP</sup> Patient Portal Account Management Credit Card batches posted within the last 30 days.

**12. BATCH RETENTION DAYS (DISPLAY ONLY)**

This field contains the number of days that the Horizon<sup>WP</sup> Patient Portal Account Management Credit Card Cash batches are retained by the system. This field is always set to 30 by the system and cannot be changed. Batches are automatically deleted by the system after 30 days, so they cannot be printed from the Print HCP Acct Mgmt Credit Card Cash screen after 30 days.

## **Print HCP Acct Mgmt Credit Card Cash Batches**

The Horizon<sup>WP</sup> Patient Portal Account Management cash batches can be printed from the Print HCP Acct Mgmt Credit Card Cash screen. After you select the Print HCP Acct Mgmt Credit Card Cash option, the system prompts for a facility. Select a facility and the system prompts for a batch code. Either enter the batch code associated with your cash batch or enter a hyphen (-) to see all batches that are available to print. Batches are automatically deleted by the system after 30 days so they cannot be printed from the Print HCP Acct Mgmt Credit Card Cash screen after 30 days. Cash batches older than 30 days are not displayed on the screen.

The Cash Posting Audit Report (FAR120) is generated when cash batches are processed by the system. The batch description on this report is the name in the Credit Card Batch Description field on the HCP Acct Mgmt Credit Card Options screen. The option to print the credit card batches is also available on the Account Transaction menu. For more information on this option, please refer to the *Account Transactions Volume* of the *STAR Financials Patient Accounting Reference Guide*.

**NOTE:** Horizon<sup>WP</sup> Patient Portal credit card cash batches cannot be viewed or printed through the regular cash batches such as Post Cash, Post Line Item Cash, Post Window Cash, or Post Guarantor Cash.

General Hospital Print HCP Acct Mgmt Credit Card Cash Processor							
Fri Aug 22, 2003 03:14							
Page:01							
HCP Acct Mgmt Credit Card Batches							
Batch	Status	Creation	Date/Time	Posting	Date/Time	Entries	Total
(1) 1025	Posted	08/21/03	1105	08/22/03	1105	1	\$437.74
(2) 1024	Posted	08/21/03	1030	08/23/03	1030	20	\$100.16

## Field Explanations

### BATCH (DISPLAY ONLY)

This field displays the 4-digit batch identification number associated with the Horizon<sup>WP</sup> Patient Portal Acct Mgmt Credit Card Cash Batch. Valid identification numbers are 1000 to 9999.

These batches can be created only through the Horizon<sup>WP</sup> Patient Portal Account Management interface. For those batches created through the interface, the identification number is always a system-assigned, four-digit number.

### STATUS (DISPLAY ONLY)

This field displays the status of the associated cash batch. For Horizon<sup>WP</sup> Patient Portal Acct Mgmt Credit Card Cash batches, this field always displays the value of Posted, for any batch that has been posted. The field displays Balanced for the current open batch. There can be only one current open batch per facility.

**NOTE:** If this field displays **Approved**, it means that the system tried to post the batch but there was a problem, and the batch could be partially posted. If the batch is partially posted, the system prompts you to post it when the batch is selected. This partially posted batch issue is not unique to Horizon<sup>WP</sup> Patient Portal Credit Card Cash batches. Any type of cash batch could have an Approved status if it was partially posted.

### CREATION DATE/TIME (DISPLAY ONLY)

This field displays the date and time on which the batch was created.

### POSTING DATE/TIME (DISPLAY ONLY)

This field displays the date and time on which the batch was posted. This field contains a value only if the batch is posted.

### ENTRIES (DISPLAY ONLY)

This field indicates the number of transactions that are contained in the Horizon<sup>WP</sup> Patient Portal Acct Mgmt Credit Card Cash batch.

**TOTAL (DISPLAY ONLY)**

This field contains the total amount of all of the transactions entered in the batch. An entry is placed in a Horizon<sup>WP</sup> Patient Portal Acct Mgmt Credit Card Cash batch after a payment is made through the Horizon<sup>WP</sup> Patient Portal Account Management interface.

## REPORTING

### HCP Application Interface Error Report (FWR100)

#### DESCRIPTION/PURPOSE

This report contains any application interface error (API) that occurs with the Horizon<sup>WP</sup> Patient Portal Account Management interface. This report should be reviewed daily. If anything appears on the report, the hospital should contact McKesson. The information contained in the report is used by McKesson to assist in troubleshooting the problem.

#### GENERATING AND PRINTING THIS REPORT

This report is generated each night in Midnight Processing. The report generates even if there are no entries on the report. The report includes all facilities on one report.

Figure 1.1 HCP Application Interface Error Report (FWR100)

HCP Application Interface Error Report				
Fri Aug 22, 2003 03:14				
Page:01				
Date	Time	Seq	Class	Function
08/22/03	15:02:12	85	UserInfoationEnabler	getUserInformation
Error Message				
INVALID CORPORATE # - 1033044				

## Field Explanations

### DATE

This field indicates the date that the error was received.

### TIME

This field indicates the time the error was received.

### SEQUENCE

This field indicates the sequence of the API call for the date. For example, if the field had a sequence of 49 and the date was 08/29/03, it would be the 49th API call for 08/29/03.

### CLASS AND FUNCTION

Both the Class and Function fields identify which program gets called on STAR.

### ERROR MESSAGE

This field contains the error message. Errors 1 and 2 are detected during Midnight Processing, and Errors 3 through 9 are detected during the API call. Contact McKesson Support for each of these messages. Following is a list of the possible error messages:

DATA NOT RETURNED or CALL ABORTED. These are generic communication errors that are not able to supply any additional information.

INVALID CORPORATE # - (corp # received). The corp # received is not valid when an account list is requested from Horizon<sup>WP</sup> Patient Portal.

INVALID ACCOUNT # - (account # received). The account # received is not valid when detailed account information is requested from Horizon<sup>WP</sup> Patient Portal.

CASH ERROR : INVALID ACCOUNT #- (account # received). The account # received is not valid when a payment is made from Horizon<sup>WP</sup> Patient Portal.

CASH ERROR : MISSING TRANSACTION CODE - (account # received). The account # is valid for a payment from Horizon<sup>WP</sup> Patient Portal, but the transaction code is not set up on STAR Patient Accounting.

CASH ERROR : DUPLICATE CASH REQUEST -(account # received). The account # is valid for a payment from Horizon<sup>WP</sup> Patient Portal, but the payment request is a duplicate (very rare).

BILL ERROR : INVALID ACCOUNT # - (account # received). The account # received is not valid when a bill is requested from Horizon<sup>WP</sup> Patient Portal.



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BILL ERROR : INVALID PARAMETERS - (account# received). The account # is valid for a bill request from Horizon<sup>WP</sup> Patient Portal, but bill parameter was received.



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## ■ R e a d e r C o m m e n t F o r m ■

We value your suggestions for improving our documentation. Please use this form to evaluate the *Horizon<sup>WP®</sup> Patient Portal Interface Guide* of the *STAR Financials Patient Accounting Reference Guide* for Release 17.0.

Topic	Poor	Fair	Good	Excellent
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Are there parts of this manual that could be made more helpful to you? Please explain.

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Other Comments:

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Thanks for your help in improving the documentation.

Your Name and Position

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