Initial Operating Capability Site Memorandum of Understanding



December, 2016

Version 1.0

Department of Veterans Affairs

Revision History

| Date | Version | Description | Author |
| --- | --- | --- | --- |
| 12/14/16 | 1.0 | Initial Document for approval | J. Clark |
|  |  |  |  |

Table of Contents

[Initial Operating Capability Site Memorandum of Understanding 1](#_Toc465282464)

[Initial Operating Capability Site Profile Template 5](#_Toc465282465)

[Point of Contact Information 5](#_Toc465282466)

[Other IOC Agreements: 5](#_Toc465282467)

[Initial Operating Capability Evaluation Success Criteria 5](#_Toc465282468)

[Warranty MCCF eBilling Patch 5](#_Toc465282469)

[Table of IOC Evaluation Success Criteria 6](#_Toc465282470)

[Category/Criteria/Metric 6](#_Toc465282471)

[Performance 6](#_Toc465282472)

[Scope 6](#_Toc465282473)

[Data Quality 6](#_Toc465282474)

[Stakeholder Acceptance 6](#_Toc465282475)

[Released and Unreleased Dependencies Template 7](#_Toc465282476)

[Released Dependencies: 7](#_Toc465282477)

[Unreleased Dependencies: 7](#_Toc465282478)

[Software/Patch Information for Change Control Board (CCB) Template 8](#_Toc465282479)

[Section I –Software/Patch Information 8](#_Toc465282480)

[Section II – Impacts 8](#_Toc465282481)

[Section III – Cross Dependencies 9](#_Toc465282482)

[Section IV– Supporting Documents 9](#_Toc465282483)

# Initial Operating Capability Site Memorandum of Understanding

**Department of Veterans Affairs Memorandum**

Date: April 5, 2017

From: Enterprise Program Management Office, OI&T

Subj: Initial Operating Capability Evaluation of Integrated Billing Patch IB\*2\*576

To: Timothy Liezert, Director, Orlando VA Medical Center, Orlando, FL

We are requesting to have your facility join us as an Initial Operating Capability (IOC) Evaluation site of patch IB\*2\*576. If you agree please authorize via email response. Although minor chnges in schedule could occur, we expect to be testing from May 17 – June 15, with test and production account installation and other preparations immediately preceding that.

This patch makes these changes:

1. No longer automatically default the onset date to the date of service.
2. Display Missing MRW Legend Indicators on the Medicare Remittance Advice (MRA) Management Worklist.
3. Add additional fields to printed CMS 1500 (claim form) for replacement or voided/canceled claims.
4. Improve edits to Payer Zip Code Field and store only valid nine-digit zip codes when entering or updating payer address information so that claims are routed to the correct payer.

The purpose of this patch is to meet the requirements for the Medical Care Collections Fund (MCCF) Electronic Data Interchange (EDI) Transaction Applications Suite Phase 1 project related to VistA Integrated Billing (IB).

As an IOC Evaluation site installing and implementing evaluation software, your facility will assume a key role in the release process, which is an essential step in the development of software that will be utilized nationally throughout the Department of Veterans Affairs. Your site will also serve to test the installation of the software in a production environment to ensure its compatibility with other Legacy VistA and/or HealtheVet VistA packages.

The Medical Care Collections Fund (MCCF) Electronic Data Interchange (EDI) Transaction Applications Suite Phase 1 Development Team (“the Development team”) agrees to the following responsibilities:

1. If sensitive data is being transferred, a Data Transfer Agreement (DTA) is required. Enterprise Project Management Division (EPMD) will agree to and sign a DTA with the IOC site staff before any exchange of sensitive data is performed.
2. The Development Manager will verify with the [VHA Privacy Office](mailto:IACH9@med.va.gov) that the national Business Associate Agreement (BAA) provides sufficient coverage for the activities performed in the MOU.
3. We will work with your Office of Information and Technology (OIT) and IT staff as the primary support for the patch during the test period. Support will be provided via telephone, including dial-in service to your computer system if necessary. We may opt to use available tools (e.g., Kernel) to monitor testing at your site. You can be assured that appropriate respect for the sensitivity and value of your site's database will be given and that absolute discretion will be observed. Staff will sign all necessary security agreements with your site. Conference calls will be scheduled on a regular basis to promote an ongoing dialog throughout the testing phase.
4. Evaluation of this software may include other software which contains critical dependencies. These dependencies are split into two lists and are described below.
5. Released Dependencies. This includes software that has passed all testing for implementation nation-wide. It may include required tools from the EPMD HealtheVet VistA Toolset, monitoring software, services, integrated software, or something else. These are not part of testing, as they are already approved for national use.
6. Unreleased Dependencies. This includes software that has not undergone testing and is not yet approved for nation-wide implementation. These dependencies may include required tools from the [OIT HealtheVet VistA Toolset](http://vista.med.va.gov/vistaarch/healthevet/Documents/Tools-List-Extended.doc) monitoring software, services, integrated software, or other dependencies. The list of unreleased dependencies is part of this field test.
7. Provide the list of [Released and Unreleased Dependencies](#_Released_And_Unreleased).
8. In the event of the participants needing elevated privileges, all participants in the project will follow the VA and OIT change management process and approvals. It is noted regional process might differ across the regions.
   1. Developers will need access prior to the start of the IOC.

As a test site, we are asking VHA accept the following responsibilities:

1. Agree to and sign a DTA with Development staff before any exchange of sensitive data is performed.
2. Evaluate all system/application functionality.
3. Assist the Development Team in validating the functionality of the software and the accuracy of all reports produced by the package.
4. Review and comment on the User Guide, Technical Manual, and Installation Guide/Release Notes documentation produced for this package.
5. Report all problems to the Development Team promptly, with as much detail as possible, to ensure that the situation may be promptly addressed and corrected.
6. Participate in regular conference calls.
7. Provide an Initial Operating Capability Site Concurrence Statement at the conclusion of testing (refer to Section 3 of ProPath’s ioc\_site\_evaluation\_defect\_log\_and\_concurrence\_statement\_template).

As a test site, we are asking Field Operations to accept the following responsibilities:

1. Install all software related to this Patchas promptly as possible, including all of the dependency software. EPMD understands and endorses the installation of new software into a test environment on your VistA system as a preliminary condition to the installation of that software into your production, or live, accounts. However, to ensure prompt resolution of problems and to ensure a complete test, the software must be placed into a production environment within 2 working days of receipt
2. Report all problems to the Development Team promptly, with as much detail as possible, to ensure that the situation may be promptly addressed and corrected.
3. Participate in regular conference calls.

In addition, we ask that you meet the following conditions:

1. Allow access to your system by the Development Team to support the research and resolution of problems. The details of this access will be worked out with your OIT staff. The contacts for this software are:

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Email Address** | **Role** | **Phone Number** |
| Heather Lewis | Heather.Lewis@va.gov | VA OI&T Project Manager | 732-440-9632 |
| Bill Jutzi | William.Jutzi@va.gov | Technical Lead | 503-794-2899 |
| Mary Simons | Mary.Simons@va.gov | Lead Analyst | 727-320-1935 |
| Vito D’Amico | Vito.D’Amico @va.gov | Developer | 603-554-1933 |
| Sharon Taubenfeld | Sharon.Taubenfeld@va.gov | Contractor Project Manager | 774-331-5254 |
| Jeff Clark | [Jeffrey.Clark5@va.gov](mailto:Jeffrey.Clark5@va.gov) | Contractor Project Manager | 860-881-2284 |

1. These individuals can be reached through FORUM or Microsoft Outlook. They can also be reached via telephone at the numbers listed above. If there is a problem, it is vital that one of the developers be contacted as soon as possible with as much detail as possible to identify the problem and correct it.
2. Load patches on existing hardware. No additional hardware is required. Use the software exactly as provided. To support you in the evaluation, the development team makes all necessary modifications to the software. Any emergency fixes made by the site must be reported to this office immediately. During evaluation, **local enhancements must not be implemented** in order to preserve the reliability and integrity of the test.
3. Provide complete security of this software, including all of the conditions stipulated in the signed DTA related to this Memorandum of Understanding (MOU), until it has been released nationally. Therefore, no copies of the routines, files, or data dictionaries may be released without the written consent of EPMD. Final disposition/disposal of the software will be followed as stipulated by the signed DTA related to this MOU. We are confident that you will treat the software in such a manner and will inform us immediately of any possible breaches in this security.

Recent experiences on a variety of software packages system-wide have served to emphasize the degree of importance of conducting thorough and timely evaluation of software before release. You are requested to discuss this evaluation with the Service Chiefs of the individuals in the positions identified on the enclosed Test Site Profile so that all affected parties may reach an understanding of the impact the test may have on your medical center and the resources that may be necessary to accomplish tasks. Respond directly on the e-mail (not in the document) with any additional information or corrections that need to be made to the IOC Site Profile.

We look forward to working with your staff in the successful implementation of this product. This agreement will cover the life of the test cycle. Questions regarding the requirements outlined in this memorandum should be directed to Jeff Clark, [Jeffrey.Clark5@va.gov](mailto:Jeffrey.Clark5@va.gov), 860-881-2284.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



Chris Minardi, OI&T Enterprise Project Management Division Portfolio Director

Attachments: IOC Site Profile

IOC Evaluation Success Criteria

cc: Region 3 ESL Lead, Ken Rohde

VISN 8 Chief Information Officer (CIO), Michael Hickman

Health Product Support, Sheryl Jackson

Health Product Support, Mary Caulfield

# Initial Operating Capability Site Profile Template

**IB\*2\*576**

|  |  |
| --- | --- |
| **Site Name:** | Orlando VA Medical Center, Orlando, FL |
| **Telnet Address:** | <Insert Telnet Address> |
| **Operating System:** | <Insert Operating System> |

## Point of Contact Information

Point of Contact Information may have been obtained via a site questionnaire. If so, confirm that the information below is correct. Otherwise, provide the points of contact for each of the service areas impacted by the functionality outlined in this Memorandum of Understanding (MOU).

| Service/Application | Name | Phone Number |
| --- | --- | --- |
| Medical Center Director | Timothy Liezert | 407-631-4000 |
| Facility CIO | Lisa Turner | 407-631-4325 |
| Network CIO (VISN 8) | Michael Hickman | 727-575-8139 |
| Tester | Kenia Hughes (FCCPAC) | 407-622-4116 |
| Tester | Brenda Schendel (FCCPAC) | 407-622-4069 |
| ESL Lead (Region 3) | Keith Rohde | (727) 398-9527 |
| ESL Patch Installer | Linda Wingfield | (804) 675- 5000 x4618 |

## Other IOC Agreements:

# Initial Operating Capability Evaluation Success Criteria

**Integrated Billing Patch IB\*2\*576**

This Memorandum of Understanding (MOU) contains measurable criteria used to declare that the Integrated Billing IB\*2\*576 is successful. This project will be successful when all scope outlined below has been tested and validated working correctly.

## Table of IOC Evaluation Success Criteria

### Category/Criteria/Metric

#### Performance

* There are no performance requirements specific to this development effort.

#### Scope

No longer automatically default the onset date to the date of service.

Display Missing MRW Legend Indicators on the Medicare Remittance Advice (MRA) Management Worklist.

Add additional fields to printed CMS 1500 (claim form) for replacement or voided/canceled claims.

Improve edits to Payer Zip Code Field and store only valid nine-digit zip codes when entering or updating payer address information so that claims are routed to the correct payer.

#### Data Quality

Mapped data

* All data fields map to a VistA storage location appropriately.

#### Stakeholder Acceptance

By the VistA system

* Sign off in Forum from each test site Point of Contact indicating concurrence that the Project was successful.

# Released and Unreleased Dependencies Template

**Integrated Billing Patch IB\*2\*576**

Initial Operating Capability (IOC) Evaluation of this software may include other software which contains critical dependencies. These dependencies are split into two lists and are described below.

* Released Dependencies. This includes software that has passed all testing for implementation nation-wide. It may include required tools from the OIT HealtheVet VistA Toolset, monitoring software, services, integrated software, or something else. These are not part of testing, as they are already approved for national use.
* Unreleased Dependencies. This includes software that has not undergone testing and is not yet approved for nation-wide implementation. These dependencies may include required tools from the OIT HealtheVet VistA Toolset monitoring software, services, integrated software, or other dependencies. The list of unreleased dependencies is part of this field test.

## Released Dependencies:

* None known

## Unreleased Dependencies:

* None known

# Software/Patch Information for Change Control Board (CCB) Template

|  |  |
| --- | --- |
| **Project Name:** | Integrated Billing Patch IB\*2\*576 |
| **Portfolio Name:** | Health |
| **Project Management:** | Heather Lewis, Project Manager, OI&T VA |
| **Date:** | 3/28/17 |

## Section I –Software/Patch Information

|  |  |
| --- | --- |
| **Date Decision Needed By:** | 4/14/17 |
| **Software/Patch Description:** |  |

## Section II – Impacts

|  |  |
| --- | --- |
| **Impact of Implementing Software/Patch:** | Key workflows for cash and account management personnel are enhanceded improving speed and accuracy of processing received funds.  . |
| **Impact of NOT Implementing Software/Patch:** | Missed opportunity to improve speed and accuracy of précising received funds.  . |
| **Clearly describe all impacts to other projects and the effect of this Software/Patch on those projects:** | There is no impact on other projects with this patch. |

## Section III – Cross Dependencies

| Name of project/organization | Relationship | Impact |
| --- | --- | --- |
| None |  |  |

## Section IV– Supporting Documents

|  |  |
| --- | --- |
| **1.** |  |
| **2.** |  |
| **3.** |  |