Medical Care Collection Fund (MCCF)
Electronic Data Interchange (EDI)
Transaction Applications Suite (TAS)
ePayments Build 19

ePayments PRCA\*4.5\*409
Accounts Receivable IB\*2.0\*670

Deployment, Installation, Back-out, and Rollback Guide



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Artifact Rationale

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

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

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# Introduction

This document describes how to deploy and install the multi-build PRCA IB BUNDLE 8.0 (includes PRCA\*4.5\*409 and IB\*2.0\*670) and how to back-out the product and rollback to a previous version or data set.

## Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom the multi-build PRCA IB BUNDLE 8.0 (includes PRCA\*4.5\*409 and IB\*2.0\*670) will be deployed and installed, as well as how it is to be backed out and rolled back, if necessary. The plan identifies resources, communications plan, and rollout schedule. Specific instructions for installation, back-out, and rollback are included in this document.

## Dependencies

PRCA\*4.5\*349 and PRCA\*4.5\*371 must be installed BEFORE PRCA\*4.5\*409.

## Constraints

This patch is intended for a fully patched VistA system.

# Roles and Responsibilities

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

| ID | Team | Phase / Role | Tasks | Project Phase (See Schedule) |
| --- | --- | --- | --- | --- |
| 1 | VA OIT, VA OIT Health Product Support, and PMO (Leidos) | Deployment | Plan and schedule deployment (including orchestration with vendors) | Planning |
| 2 | Local VAMC and CPAC processes | Deployment | Determine and document the roles and responsibilities of those involved in the deployment. | Planning |
| 3 | Field Testing (Initial Operating Capability - IOC), Health Product Support Testing, and VIP Release Agent Approval  | Deployment | Test for operational readiness  | Testing |
| 4 | Health Product Support and Field Operations | Deployment | Execute deployment | Deployment |
| 5 | Individual Veterans Administration Medical Centers (VAMCs) | Installation | Plan and schedule installation  | Deployment |
| 6 | VIP Release Agent | Installation | Ensure authority to operate and that certificate authority security documentation is in place | Deployment |
| 7 |  | Installation | Validate through facility POC to ensure that IT equipment has been accepted using asset inventory processes | N/A; only existing VistA system will be used |
| 8 | VA’s eBusiness team | Installations | Coordinate training  | Deployment |
| 9 | VIP Release Agent, Health Product Support, and the development team | Back-out | Confirm availability of back-out instructions and back-out strategy (what are the criteria that trigger a back-out)  | Deployment |
| 10 | VA OIT, VA OIT Health Product Support, and MCCF EDI TAS Development Team (Halfaker) | Post Deployment | Hardware, Software and System Support | Warranty |

# Deployment

The deployment is planned as a national rollout.

This section provides the schedule and milestones for the deployment.

## Timeline

The deployment and installation are scheduled to run for 30 days starting with national release.

## Site Readiness Assessment

This section discusses the locations that will receive the deployment of the multi-build PRCA IB BUNDLE 8.0 (includes PRCA\*4.5\*409 and IB\*2.0\*670).

### Deployment Topology (Targeted Architecture)

This multi-build PRCA IB BUNDLE 8.0 (includes PRCA\*4.5\*409 and IB\*2.0\*670) is to be nationally released to all VAMCs.

### Site Information (Locations, Deployment Recipients)

The IOC sites are:

* Columbus VAMC (Columbus, OH)
* South Texas HCS (San Antonio, TX)
* Durham VAMC (Durham, NC)
* Columbia, SC VAMC (Columbia, SC)
* Philadelphia, PA VAMC (Philadelphia, PA)

### Site Preparation

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

Table : Site Preparation

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

## Resources

### Facility Specifics

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

Table : Facility-Specific Features

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

### Hardware

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

Table : Hardware Specifications

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

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

### Software

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

Table : Software Specifications

| Required Software | Make | Version | Configuration | Manufacturer | Other |
| --- | --- | --- | --- | --- | --- |
| Fully patched Accounts Receivable package within VistA | N/A | 4.5 | N/A | N/A | N/A |
| Fully patched Integrated Billing package within VistA | N/A | 2.0 | N/A | N/A | N/A |

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

### Communications

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

#### Deployment / Installation / Back-out Checklist

The Release Management team will deploy the multi-build PRCA IB BUNDLE 8.0, which is tracked nationally for all VAMCs in the National Patch Module (NPM) in Forum. Forum automatically tracks the patches as they are installed in the different VAMC production systems. One can run a report in Forum to identify when and by whom the patch was installed into the VistA production at each site. A report can also be run to identify which sites have not currently installed the patch into their VistA production system. Therefore, this information does not need to be manually tracked in the chart below.

Table : Deployment / Installation / Back-out Checklist

| Activity | Day | Time | Individual who completed task |
| --- | --- | --- | --- |
| Deploy | N/A | N/A | N/A |
| Install | N/A | N/A | N/A |
| Back-out | N/A | N/A | N/A |

# Installation

## Pre-installation and System Requirements

Multi-build PRCA IB BUNDLE 8.0 is installable on a fully patched M(UMPS) VistA system and operates on the top of the VistA environment provided by the VistA infrastructure packages. The latter provides utilities that communicate with the underlying operating system and hardware, thereby providing each VistA package independence from variations in hardware and operating system.

## Platform Installation and Preparation

Refer to the PRCA\*4.5\*409 documentation on the NPM in Forum for the detailed installation instructions. These instructions include any pre-installation steps if applicable.

## Download and Extract Files

Refer to the PRCA\*4.5\*409 and IB\*2.0\*670 documentation on the NPM to find related documentation that can be downloaded. The patch description of each patch will be transmitted as a MailMan message from the NPM. These messages can also be pulled from the NPM. The patches themselves are bundled together into the multi-build PRCA IB BUNDLE 8.0. The host file containing these patches must be downloaded separately. The file name is PRCA\_IB\_EPAYMENTS\_BUNDLE\_8\_0.KID and it can be found on the [VistA software download site](https://download.vista.med.va.gov/index.html/SOFTWARE/).

## Database Creation

Multi-build PRCA IB BUNDLE 8.0 modifies the VistA database. All changes can be found on the NPM documentation for this patch.

## Installation Scripts

No installation scripts are needed for multi-build PRCA IB BUNDLE 8.0 installation.

## Cron Scripts

No Cron scripts are needed for multi-build PRCA IB BUNDLE 8.0 installation.

## Access Requirements and Skills Needed for the Installation

Staff performing the installation of this multi-build will need access to FORUM’s NPM to view all patch descriptions. Staff will also need access and ability to download the host file from the VistA software download site. The software is to be installed by each site’s or region’s designated VA OIT IT Operations Service, Enterprise Service Lines, VistA Applications Division[[1]](#footnote-1).

## Installation Procedure

Detailed instructions for installing the multi-build PRCA IB BUNDLE 8.0 (includes PRCA\*4.5\*409 and IB\*2.0\*670) can be found on the patch description for PRCA\*4.5\*409, which can be found on the NPM. Installing the multi-build PRCA IB BUNDLE 8.0 will install all component patches (PRCA\*4.5\*409 and IB\*2.0\*670).

## Installation Verification Procedure

Refer to the PRCA\*4.5\*409 documentation on the NPM for detailed installation instructions. These instructions include any post installation steps if applicable.

## System Configuration

No system configuration changes are required for this patch.

## Database Tuning

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

# Back-out Procedure

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

## Back-out Strategy

A decision to back out could be made during Site Mirror Testing, during Site Production Testing, or after National Release to the field (VAMCs). The best strategy decision is dependent on the stage during which the decision is made.

### Mirror Testing or Site Production Testing

If a decision to back out is made during Mirror Testing or Site Production Testing, a new version of the patch can be used to restore the build components to their pre-patch condition.

### After National Release but During the Designated Support Period

If a decision to back out is made after national release and within the designated support period, a new patch will be entered into the NPM in Forum and will go through all the necessary milestone reviews, etc. as a patch for a patch. This patch could be defined as an emergency patch, and it could be used to address specific issues pertaining to the original patch or it could be used to restore the build components to their original pre-patch condition.

### After National Release and Warranty Period

After the 90-day warranty period, the VistA Maintenance Program will produce the new patch, either to correct the defective components or restore the build components to their original pre-patch condition.

## Back-out Considerations

Changes implemented with multi-build PRCA IB BUNDLE 8.0 can be backed out in their entirety or on an enhancement-by-enhancement basis. Either could be accomplished via a new version of multi-build PRCA IB BUNDLE 8.0 if before national release or a new multi-build if after national release.

### Load Testing

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

### User Acceptance Testing

1. The ability to automatically remove all data exceptions for an ERA when the ERA is removed from the worklist was added to the Remove ERA from Active Worklist [RCDPE REMOVE ERA FROM WORKLIST] (REM) option.
2. The display of data exceptions using the EDI Lockbox 3rd Party Exceptions [RCDPE EXCEPTION PROCESSING] (EXC) option was modified to allow for up to 17 character claim numbers.
3. To allow quick access to recently changed electronic remittance advice (ERA) and electronic funds transfer (EFT) data, several date/time fields, indexes and cross references were added to Vista to facilitate reporting in future releases.
4. The View/Print ERA [RCDPE VIEW/PRINT ERA] (VP) option was modified to allow for ERAs with provider line balances (PLBs) but no claim data to be displayed properly.
5. Enhanced the Receipt Processing [RCDP RECEIPT PROCESSING] (RP) option to allow for ECME or Prescription number lookup when adding a new payment to a receipt. Previously, ECME or Prescription number lookup was only allowed for EDI LOCKBOX receipt types.
6. Enhanced the Receipt Processing [RCDP RECEIPT PROCESSING] (RP) option to allow for a new AR EVENT TYPE (file 341.1) OGC-CHK to checks sent by the Office of General Council (OGC).
7. Modified the ERA Unmatched Aging Report (ERA) to optional display adjustment/code information.
8. Fixed a bug in the EFT Transaction Audit Report [RCDPE EFT TRANSACTION AUD REP] (ETA) option that prevented the user from up-arrowing out of the deposit number selection when running the report in summary mode by deposit number.

## Back-out Criteria

It may be decided to back out this patch if the project is canceled, the requested changes implemented by multi-build PRCA IB BUNDLE 8.0 are no longer desired by VA OIT and the ePharmacy eBusiness team, or the patch produces catastrophic problems.

## Back-out Risks

Since the ePharmacy software is tightly integrated with external systems, any attempt at a back-out should include close consultation with the external trading partners such as the Financial Services Center (FSC) and the Health Care Clearing House (HCCH) to determine risk.

## Authority for Back-out

Any back-out decision should be a joint decision of the Business Owner (or their representative) and the Program Manager with input from the Health Services Portfolio (HSP) Application Coordinator, developers (both project and Tier 3 HSP), and if appropriate, external trading partners such as the VA FSC or Change Healthcare.

## Back-out Procedure

The back-out plan for VistA applications is complex and not a “one size fits all” solution. The general strategy for a VistA back-out is to repair the code with a follow-up patch. The development team recommends that sites log a ticket if it is a nationally released patch.

If it is prior to national release, the site will be already working directly with the development team daily and should contact that team. The development team members will have been identified in the Initial Operating Capability (IOC) Memorandum of Understanding (MOU). As discussed in section 5.2, it is likely that development team can quickly address via a new software version. If the site is unsure whom to contact, they may log a ticket or contact Health Services Portfolio.

Multi-build PRCA IB BUNDLE 8.0 contains the following build components:

* Routines
* Data Dictionaries

While the VistA KIDS installation procedure allows the installer to back up the modified routines using the ‘Backup a Transport Global’ action, the back-out procedure for global, data dictionary, and other VistA components is more complex and requires issuance of a follow-up patch to ensure all components are properly removed, restored, or both. All software components (routines and other items) must be restored to their previous state at the same time and in conjunction with the restoration of the data.

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

## Back-out Verification Procedure

Successful back-out is confirmed by verification that the back-out patch was successfully implemented. This includes successful installation and testing that the back-out acts as expected, as defined together with the team the site contacted in section 5.5.

# Rollback Procedure

Rollback pertains to data. The data changes in this patch are specific to the operational software and platform settings. These data changes are covered in the Back-out procedures detailed elsewhere in this document.

## Rollback Considerations

Not applicable.

## Rollback Criteria

Not applicable.

## Rollback Risks

Not applicable.

## Authority for Rollback

Not applicable.

## Rollback Procedure

Not applicable.

## Rollback Verification Procedure

Not applicable.

1. “Enterprise service lines, VAD” for short. Formerly known as the Information Resources Management (IRM) or IT support. [↑](#footnote-ref-1)