

**Fee Basis**

**Release Notes**

**and**

**Installation Guide**



FB\*3.5\*124

September 2012

Veterans Affairs  
Product Development (PD)

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# 1. Introduction

This enhancement seeks a means to prevent the entry of Fee claims into the local Veterans Information Systems and Technology Architecture (VistA) Fee Package where the claims received date is prior to the admission/treatment date/prescription fill date (hereafter referred to as treatment date).

Some work intended to accomplish this overall goal had already been done prior to this enhancement, mostly in areas where a new invoice is entered for the first time. In those instances, no changes were made, but all areas where the dates involved can be entered or edited, the user is prevented from entering invalid dates anywhere such dates can be entered.

## 1.1. Hardware Compatibility

This patch is an enhancement to existing VistA legacy modules and requires no special hardware considerations.

## 1.2. System Specifications

This patch is an enhancement to existing VistA legacy modules and requires no special system considerations.

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## 2. Installation Instructions

### 2.1. Pre-Installation Considerations

Associated patches that must be installed BEFORE FB\*3.5\*124

FB\*3.5\*61  
FB\*3.5\*79  
FB\*3.5\*108

### 2.2. Patch Installation

Pre/Post Installation Overview

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Standard Pre-Installation procedures for installing a patch from PackMan are all that is needed to install this patch.

No Post-Installation procedures are necessary to install this patch.

Installation Instructions

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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 5 minutes to install. Queuing the installation of this patch is not recommended.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following options. When prompted for the INSTALL enter the patch number (FB\*3.5\*124):
  - 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 DDs 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, DDs, 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.

4. From the Installation Menu, select the Install Package(s) option and choose the patch to install.
5. When prompted 'Want KIDS to INHIBIT LOGONs during the install?  
NO//' Accept the default of NO
6. When prompted 'Enter options you wish to mark as 'Out Of Order':' Enter the following options:
  - [FBAA ENTER PAYMENT]
  - [FBAA MEDICAL REIMBURSEMENT]
  - [FBAA C&P ENTER PAYMENT]
  - [FBAA EDIT PHARMACY INVOICE]
  - [FBAA ENTER PHARMACY INVOICE]
  - [FBAA REIMBURSEMENT PHARMACY]
  - [FBAA MULTIPLE PAYMENT ENTRY]
  - [FBAA EDIT PAYMENT]
  - [FBCH ANCILLARY PAYMENT]
  - [FBCH ANCILLARY REIMBURSEMENT]
  - [FBCH ENTER PAYMENT]
  - [FBCH REIMBURSEMENT INVOICE]
  - [FBCH EDIT PAYMENT]
  - [FBCH MULTIPLE PAYMENTS]
  - [FBCH EDIT ANCILLARY PAYMENT]
  - [FBCNH EDIT PAYMENT]
  - [FBUC PAYMENTS]
7. If prompted "Delay Install (Minutes): (0-60): 0// respond 0

#### Post-Installation Instructions

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There are no Post-Installation steps necessary for installing this patch.

### 2.3. Documentation Retrieval

Sites may retrieve documentation in one of the following ways:

1. The preferred method is to FTP the files from REDACTED, which will transmit the files from the first available FTP server.
2. Sites may also elect to retrieve documentation directly from a specific server as follows:

Albany	REDACTED
Hines	REDACTED

3. Documentation can also be retrieved from the VistA Documentation Library (VDL) on the Internet at the following address:

<http://www.va.gov/vdl>.

The documentation distribution includes:

<u>TITLE</u>	<u>FILE NAME</u>
Fee Basis User Manual	FB_3_5_UM_ R0912.DOC
Fee Basis Release Notes/Installation Guide (FB*3.5*124)	FB_3_5_P124_RN.DOC
Fee Basis Technical Manual	FB_3_5_TM_ R0912.DOC

Note: Use ASCII mode when transferring the .KID file.

Use Binary mode when transferring the .PDF file. The .PDF files can be read on a PC using the Adobe Acrobat Reader program. The VistA Documentation Library [VDL] contains all end-user manuals.

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## 3. Release Changes and Enhancements

Patch FB\*3.5\*124 modifies Fee Basis to fully enforce the long-standing requirement that Invoices may not be approved for payment of medical services which have not yet been rendered. I.e. no valid Fee Basis invoice may include charges for services on a date later than the date the invoice was received by the VA.

Previously, enforcement of this requirement was dependent largely on the Fee Basis Clerk recognizing such a condition when entering the invoice data, which was difficult since often only one of the dates was visible on the screen during data entry.

Note:

The dates collectively referred to below as “Date of Service” refer to various fields, depending on the type of invoice. In addition to “Date of Service”, such fields include Treatment Date (or Treatment To Date), Admission or Discharge Date, and Prescription Filled Date.

This patch adds more sophisticated, and more complete, date-validation checks in multiple places where various types of invoices are entered or edited. It will refuse to allow entry of a Date of Service which is later than the Invoice Received Date or of an Invoice Received Date which is earlier than the latest Date of Service on the invoice.

The areas where the new date checks have been introduced are identified above, in the list of Menu Options affected, in Step 6 of the Patch Installation Section 2.2 above. For invoices which may include a range of dates – such as Civil Hospital Inpatient or Nursing Home, the Invoice Date is compared to the last Date of Service, i.e. the Treatment To date. For Invoices which may include multiple charges on different dates, such as different prescriptions filled on different days, the Invoice Received Date is compared to the date of the latest charge included on the invoice. Whenever an invalid date is detected, the date just entered will be rejected, and the user must either re-enter a valid date (if there is one), or exit the invoice. This will ensure that data-entry mistakes are caught, and can be corrected, immediately. It will also ensure that invoices submitted for invalid dates will be reliably identified during Fee Basis data entry. And in both cases, it will ensure that no invoices for invalid dates are approved and sent to Central Fee for payment.

For more detailed menu-by-menu and field-by-field descriptions of the modifications made by Patch FB\*3.5\*124, see Appendix J in the Fee Basis User Guide.

### 3.1. Technical Modifications

#### 3.1.1 Database Repository

The existing VistA database shall be used for this enhancement. No new fields or files will be added.

#### 3.1.2 System Features

The system features include the following:

This patch contains the modified components (Routines and Input Templates) which implement the VistA Financials Annual Enhancement called VistA Fee Invoice Acceptance Date Controls (NSR# 20080613). The intent of this patch is to prevent a Fee Basis Invoice from being

approved for payment, if the Invoice was received at the VA prior to the date(s) of service for the services being billed on the Invoice.

The new checks are implemented at the field level as needed, wherever either the Invoice Received Date or the Date(s) of Service for an Invoice are entered. In cases where the Invoice Received Date is entered first, the user will not be allowed to enter a Date of Service which is later than the Invoice Received Date. If the Date(s) of Service are entered first, the user will not be allowed to enter an Invoice Received Date which is prior to the Date(s) of Service. If a user is editing a previously-entered Invoice, where both types of dates have already been entered, they will not be allowed to edit either the Date of Service, or the Invoice Received Date, if they try to enter a new value which results in the Invoice Received Date being prior to the Date(s) of Service. The changes made by this patch are described below:

1. The system will perform a validity check that cannot be made until both dates are entered. Either date may be entered first.
2. The date-check code will determine whether the Claim Received Date and the Date of Service have both been entered. If the second date has not yet been entered, the program will take no further action in the current date field.
3. If both dates have been entered, and if the Claim Received Date is PRIOR TO the Date of Service, the date entered in the current date field will not be accepted.
4. Software cannot determine whether an invalid pair of dates is the result of a user entry error, or of a claim being submitted with invalid dates. The system will notify the user when an error has been detected and reject the date just entered. The user will then determine what action to take (i.e. re-enter the current date, go back and modify the first date entered, or exit the claim.)

The application will not allow the entry of both a Claim Received Date and a Date of Service, where the Claim Received Date is prior to the Date of Service. Since both dates are required before a claim can be accepted and sent to Central Fee at the Austin Information Technology Center (AITC), this will prevent a claim from being submitted for payment with a Claim Received Date that is prior to the Date of Service.

### **3.1.3 Issue Resolutions**

There are no New Service Requests (NSRs) or Remedy Tickets associated with this patch

## **4. Support Information**

During Field Testing, these patches will be supported by the Office of Enterprise Development, the development team. For the first 30 days following National Release, the development team will work with the Product Support team to assist with any issues that arrive related to these patches. At the end of this 30 day period, assistance with issues related to these patches will be addressed through the National Service Desk and the submittal of Remedy tickets if needed.