FEE BASIS

INSTALLATION GUIDE

Patch FB*3.5*158
Health Administration Product Enhancements (HAPE)
Electronic Data Interchange (EDI)
Purchased Care (PC)
– Electronic Remittance Advice (ERA) Compliance

January 2018
Version 2.3

Department of Veterans Affairs
Office of Information and Technology
Product Development

Revision History

Table i. Revision History

Date	Version	Description	Project Mgr/Technical Writer
11/13/17	2.3	Updated Post-Install instructions	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
11/03/2017	2.2	Updated sections 1.2.1, 3.7, 5 per Product Supoort review and the expected release date	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
06/14/2017	2.1	Updated section 4 Pre/Post Installation Overview	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
10/13/2016	2.0	VA COR accepted document effective October 13, 2016. Document has been baselined for release.	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
9/27/2016	1.4	Sentence added to Post Install instructions to schedule the task for off-hours. Update software dependencies and description of CARC/RARC Relationship updates.	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
9/13/2016	1.3	Added Tucson to Section 1.3. Modified text in Section 6.	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
9/6/2016	1.2	CR related development added.	• Project Manager REDACTED • Lead Developer/Technical Writer REDACTED
2/2/2016	1.1	Updated dependencies list	• Project Manager

			REDACTED
			• Lead Developer/Technical Writer REDACTED
7/22/2015	1.0	Baselined at Version 1.0 per request from VA PM on 22 July 2015, so that document can be submitted to VA COR for final approval.	• Project Manager REDACTED
			• Lead Developer/Technical Writer REDACTED

Contents

1 Introduction

1.1   Software Overview

The Electronic Remittance Advice (ERA) Compliance Fee Basis Patch (FB*3.5*158) addresses enhancements to VistA Fee Basis and its compliance to Committee on Operating Rules for Information Exchange (CORE) Level III Electronic Remittance Advice (ERA) / Electronic Funds Transfer (EFT) standards, as part of the Health Administration Product Enhancements (HAPE) Electronic Data Interchange (EDI) Purchased Care (PC) software enhancement project.

1.2   Document Overview

This document provides installation and setup steps for Fee Basis Patch FB*3.5*158. It is intended for VistA administrators at Veterans Affairs (VA) facilities, and it assumes familiarity with installing Kernel Installation and Distribution System (KIDS) file distributions on VistA servers.

1.2.1   Additional Resources

Software and Documentation Retrieval Instructions:

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 REDACTED. 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 File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Hines: REDACTED
Salt Lake City: REDACTED

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

Title	File Name
Fee Basis User Manual	FB_3_5_UM_R1217.PDF
Fee Basis Technical Manual /Security Guide	FB_3_5_TM_R1217.PDF
Fee Basis Install Guide	FB_3_5_P158_IG.PDF
Fee Basis Release Notes	FB_3_5_P158_RN.PDF

1.3 Test Site Acknowledgment

The planned test sites for Fee Basis Patch FB*3.5*158 are the following:

- redacted

2 Software Prerequisites

Fee Basis Patch FB*3.5*158 is a KIDS software release.

2.1 Software Dependencies

The following patches _must_ be installed prior to FB*3.5*158:

Software	Version	Required Patches
Fee Basis	3.5	FB*3.5*73
Fee Basis	3.5	FB*3.5*91
Fee Basis	3.5	FB*3.5*127
Fee Basis	3.5	FB*3.5*128
Fee Basis	3.5	FB*3.5*153
Fee Basis	3.5	FB*3.5*154
Fee Basis	3.5	FB*3.5*157

3 Patch Components

3.1 Files and Fields

```
File Name (Number)         Field Name (Number)    New/Modified/Deleted
------------------         -------------------    --------------------
FEE BASIS SITE PARAMETERS  NEXT BATCH NUMBER (#10) Modified
(#161.4)
FEE BASIS BATCH (#161.7)   NUMBER (.01)           Modified
ADJUSTMENT REASON          REMITTANCE REMARK (5)  New
(#161.91)                  CORE SCENARIO (6)      New
                           ADJUSTMENT GROUP (7)   New
REMITTANCE REMARK          ADJUSTMENT GROUP (3)   New
(#161.93)
FEE BASIS PAYMENT (#162)   ADJUSTMENT (162.08,1)  New
                           PAYMENT METHODOLOGY    New
                           (162.03,82)
                           AUTHORIZATION NUMBER   New
                           (162.03,83)
                           ATTACHMENT ID          New
                           (162.03,84)
FEE BASIS PHARMACY INVOICE ADJUSTMENT (#162.15,1) New
(#162.1)
                           AUTHORIZATION NUMBER   New
                           (162.11,40)
FEE BASIS INVOICE (#162.5) ADJUSTMENT (#162.559,1) New
                           AUTHORIZATION NUMBER   New
                           (162.5,88)
                           ATTACHMENT ID          New
                           (162.5,91)
                           PAYMENT METHODOLOGY    New
                           (162.5,90)
FEE BASIS PAYMENT                                 New
METHODOLOGY (#163.98)
```

3.2 Forms

N/A

3.3 Mail Groups

```
Mail Group Name          New/Modified/Deleted
 ---------------          --------------------
N/A
```

3.4 Options

```
Option Name          Type            New/Modified/Deleted
-----------          ----            --------------------
FBAA BATCH 7YR PURGE  run routine     New
ZTMQUEUABLE OPTIONS   menu            Modified
```

3.5   Protocols

N/A

3.6   Security Keys

N/A

3.7   Templates

```
Template Name      Type      File Name (Number)  New/Modified/Deleted
--------------     ----      -----------------   --------------------
FBCH EDIT PAYMENT  INPUT     FEE BASIS INVOICE (162.5)   Modified
FBCH ENTER PAYMENT INPUT     FEE BASIS INVOICE (162.5)   Modified
FBNH EDIT PAYMENT  INPUT     FEE BASIS INVOICE (162.5)   Modified
```

3.8   Bulletins

There are no bulletins associated with this patch.

3.9   Additional Information

No additional information is included with this installation guide.

3.10   New Service Requests (NSRs)

There are no NSRs associated with this patch.

3.11   Patient Safety Issues (PSIs)

There are no PSIs associated with this patch.

3.12   Estimated Installation Time

The estimated installation time for Fee Basis Patch FB*3.5*158 is less than one minute.

4 Pre/Post Installation Overview

Pre-Installation Instructions:

⚠ ALL Payment Batches MUST be Transmitted to Central Fee and have a status of 'Vouchered' prior to installing FB*3.5*158.

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.

There are no options to disable for this installation.

The post-installation routine, FBXIP158, will run to compile the modified input templates and remove the option, FB FPPS TRANSMIT, from its parent menu. It will also establish CARC/RARC relationships.

5 Installation Instructions

The installation will install new and modified routines, Data Dictionaries, and Input Templates.

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, use the following options. When prompted for the INSTALL enter the patch # (FB*3.5*158):

⚠️ **It is very highly recommended that the installing person perform step 3a here to make a backup copy of the Transport Global and save this as a MailMan message.**

   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 (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 with 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//'

6. When prompted with 'Want KIDS to INHIBIT LOGONs during the install?   NO//' answer NO.

7. When prompted with 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' answer NO.

   When prompted with 'Enter protocols you wish to mark as 'Out Of Order':' press <return>.

8. If prompted with "Delay Install (Minutes): (0 - 60): 0// respond with 0.

6 Post-Installation Instructions

REQUIRED: With this patch the method of batch transmissions will change, transmissions will now go through Central Feed instead Vitria. The Vitria feed must be shut down to prevent duplicate claims from being processed. To shut down the Vitria fee the option, FB FPPS TRANSMIT, needs to be removed from TaskManager three days after the FB*3.5*158 installation; the Vitria feed may be shut down during business hours.

1. In the EVE Systems Manager Menu, when prompted with 'Select Systems Manager Menu Option:' answer Taskman Management.

2. When prompted with 'Select Taskman Management Option:' answer Schedule/Unschedule Options.

3. When prompted with 'Select OPTION to schedule or reschedule:' answer FB FPPS TRANSMIT.

4. When prompted with 'Transmit Invoices to FPPS...OK? Yes//' press <return>.

5. When prompted with 'Enter a COMMAND, or "^" followed by the CAPTION of a FIELD to jump to. COMMAND:' answer N.

6. In the 'Option Name:' field, enter @.

7. When prompted with 'Are you sure you want to delete this entire record (Y/N)?' answer Yes.

OPTIONAL: The option, FBAA BATCH 7YR PURGE, can now be scheduled to run monthly in TaskManager. It is recommended that the task be scheduled for off-hours when users are not on the system.

7 Routine Information

The second line of each of these routines now looks like:

```
;;3.5;FEE BASIS;**[Patch List]**;JAN 30, 1995;Build 94
```

> **i** **NOTE:** The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

```
Routine Name: FBAACIE

    Before: B16604968   After: B17356437  **38,61,91,154,158**

Routine Name: FBAACO2

    Before: B31897549   After: B33011458  **4,55,61,77,116,122,133,108,

                                           135,139,123,157,158**

Routine Name: FBAACO3

    Before: B58658444   After: B57937070  **4,38,55,61,116,122,133,108,

                                           124,143,139,157,154,158**

Routine Name: FBAADOB

    Before:  B2793564   After:  B2800687  **158**

Routine Name: FBAAEPI

    Before: B33105165   After: B32470147  **38,61,124,132,123,154,158**

Routine Name: FBAAFR

    Before:  B2615408   After: B13991294  **61,158**

Routine Name: FBAAMP

    Before:B134317556   After:B133720533
**4,21,38,55,61,67,116,108,143,

                                           123,154,158**

Routine Name: FBAAMP1

    Before: B12344888   After: B12388857  **4,55,61,77,139,158**

Routine Name: FBAAPET

    Before: B51663555   After: B51739856  **4,38,55,61,77,116,122,133,
```

```
108,124,132,139,123,154,158**

Routine Name: FBAAPP0

    Before:  B4309645   After:  B4339891  **61,91,158**

Routine Name: FBAAUTL

    Before: B26368074   After: B36872113  **101,114,108,124,127,158**

Routine Name: FBAAUTL3

    Before:  B4132421   After:  B4122598  **132,158**

Routine Name: FBAAV0

    Before: B56393278   After: B76214254
**3,4,55,89,98,116,108,132,139,

                                      123,158**

Routine Name: FBAAV01

    Before: B27989531   After: B48459341  **89,98,108,123,158**

Routine Name: FBAAV1

    Before: B29697333   After: B29696707  **10,36,39,98,158**

Routine Name: FBAAV2

    Before: B17032694   After: B39413585  **3,89,98,116,108,123,158**

Routine Name: FBAAV3

    Before:  B3409907   After:  B4896340  **3,89,116,132,158**

Routine Name: FBAAV4

    Before: B39089780   After: B39332795
**13,34,37,70,146,127,153,158**

Routine Name: FBAAV5

    Before:B101588501   After:B139989645
**3,55,89,98,116,108,139,123,158**

Routine Name: FBAAV8

    Before:B119931377   After:B120330474  **123,158**

Routine Name: FBAAVR5

    Before: B40211184   After: B40211366  **132,158**
```

```
Routine Name: FBBPG7Y

    Before:       n/a   After:  B8669207  **158**

Routine Name: FBCHEAP

    Before: B21240885   After:  B21016855  **38,55,61,77,154,158**

Routine Name: FBCHFR

    Before:  B2637264   After:  B8623931  **61,158**

Routine Name: FBCHPET

    Before: B44036498   After:  B43033601  **4,38,61,77,116,108,124,132,

                                            123,154,158**

Routine Name: FBNHEP1

    Before:  B9319871   After:  B9136492  **12,61,158**

Routine Name: FBRXFR

    Before:  B2618713   After:  B9233192  **61,158**

Routine Name: FBSVBR

    Before: B72554273   After:  B79485755  **131,132,158**

Routine Name: FBSVVA

    Before: B19365869   After:  B22383786  **131,132,158**

Routine Name: FBUTL1

    Before: B14646555   After:  B19606435  **61,158**

Routine Name: FBUTL2

    Before: B53713039   After:  B70356259  **61,73,158**

Routine Name: FBUTL4

    Before: B23579110   After:  B26671787  **61,158**

Routine Name: FBUTL4A

    Before:       n/a   After:  B30641813  **61,158**

Routine Name: FBX2P158

    Before:       n/a   After:B176094799  **158**
```

Routine Information

```
Routine Name: FBXIP158

    Before:        n/a   After:  B8013846  **158**
```

8 Back-out and Roll-back Procedures

In the event that a site determines, for whatever reason, that they need to uninstall the HAPE EDI PC – ERA Compliance patch (FB*3.5*158) and return their system to the way it was before this patch was installed, please follow these instructions. For the purpose of this discussion, the back-out procedure will include the actual software that needs to be removed. This would include both VistA routines and VistA input templates. The roll-back procedure will include a discussion of data dictionaries that are created by this patch.

It is recommended that sites log a Remedy ticket if it is a nationally released patch; otherwise, the site should contact the product development team directly for specific solutions to their unique problems.

8.1   Back-out Procedure

There are 2 build components that need to be uninstalled here: existing Fee Basis routines and existing Fee Basis Input Templates. The existing Fee Basis routines may be restored from the backup MailMan PackMan message that should have been created in step 3.a. in section 5, Installation Instructions ("Backup a Transport Global"). There are three input templates that need to be restored to the previous version. They are listed in section 3.7 of this document in the Templates section. They are named [FBCH EDIT PAYMENT], [FBCH ENTER PAYMENT], and [FBNH EDIT PAYMENT]. It is not standard practice to proactively backup input templates before patch installation. Therefore, in order to restore these input templates to the pre-patch FB*3.5*158 state, a new patch will be required to be sent to the target site and installed. Please contact Product Support in this case for further instructions. Product Support will work closely with the site and with the VistA Fee Basis development team.

8.2   Roll-back Procedure

The following data dictionaries will need to be restored to the pre FB*3.5*158 versions:

Required: Due to the introduction of new X-References and supporting code to manage them, these DDs must be restored.
FEE BASIS PAYMENT (#162)
FEE BASIS PHARMACY INVOICE (#162.1)
FEE BASIS INVOICE (#162.5)
ADJUSTMENT REASON (#161.91)
REMITTANCE REMARK (#161.93)

Optional: *One field in each file was expanded to accommodate larger input values. There should be no significant impact to system performance if these changes remain.*
FEE BASIS SITE PARAMETERS (#161.4)
FEE BASIS BATCH (#161.7)