

**VA**



**U.S. Department of Veterans Affairs**

Office of Information and Technology  
*Product Development*

**Electronic Data Interchange (EDI)  
New Standards and Operating Rules  
VHA Provider-side  
Technical Compliance Requirements  
(VA118-1001-1018)**

**eIV Provider Operating Rules  
Integrated Billing (IB)  
Release Notes/Installation Guide  
IB\*2\*497**

**January 2014**



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# 1 Introduction

This Integrated Billing (IB) patch introduces substantial changes to Vista's electronic Insurance Verification (eIV) Eligibility Inquiry and Response Processing in order to meet the Committee on Operating Rules for Information Exchange (CORE) Operating Rules.

APPLICATION/VERSION	PATCH
INTEGRATED BILLING (IB) V. 2.0	IB*2*497

This patch (IB\*2\*497) is being released in the Kernel Installation and Distribution System(KIDS) distribution.

## 1.1 Documentation Distribution

Updated documentation describing the new and modified functionality introduced by this patch is available.

The preferred method is to FTP the files from <ftp://download.vista.med.va.gov/>. This transmits the files from the first available FTP server. Sites may also elect to retrieve software directly from a specific server as follows:

Albany	ftp.fo-albany.med.va.gov	<ftp://ftp.fo-albany.med.va.gov>
Hines	ftp.fo-hines.med.va.gov	<ftp://ftp.fo-hines.med.va.gov>
Salt Lake City	ftp.fo-slc.med.va.gov	<ftp://ftp.fo-slc.med.va.gov>

Documentation can also be found on the VA Software Documentation Library at:<http://www4.va.gov/vdl/>

Title	File Name	FTP Mode
Release Notes/Installation Guide	ib_2_p497_rn.pdf	Binary
eIV User Guide	ib_2_p497_eIV_ug.pdf	Binary
EIV Technical Manual/Security Guide	ib_2_p497_eIV_tm.pdf	Binary
IB User Manual	ib_2_p497_um.pdf	Binary
IB Technical Manual	ib_2_p497_tm.pdf	Binary

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# 2 Patch Description and Installation Instructions

## 2.1 Patch Description

VistA Patch Display Page: 1  
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Run Date: JAN 14, 2014	Designation: IB*2*497 TEST v24
Package : INTEGRATED BILLING	Priority : MANDATORY
Version : 2	Status : UNDER DEVELOPMENT

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Associated patches: (v)IB\*2\*62 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*141 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*263 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*359 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*444 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*458 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*467 <<= must be installed BEFORE `IB\*2\*497`  
(v)IB\*2\*473 <<= must be installed BEFORE `IB\*2\*497`

Subject: E-IV PROVIDER OPERATING RULES

Category: DATA DICTIONARY  
ROUTINE  
ENHANCEMENT  
OTHER

### Description:

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Please read this patch description in its entirety before installing.

The post installation routine of this patch contains significant data conversions. A purge of some of the eIV data files, IIV RESPONSE (#365) and IIV TRANSMISSION QUEUE (#365.1), greatly reduces the conversion time. When the purge was run at test sites prior to the install, the installation of this patch took between 1-4 hours. When the files were not purged prior to the install, the installation did not complete in a reasonable amount of time.

Some sites have not purged eIV data in a long time, if ever. There is an option, Purge eIV Transactions [IBCNE PURGE IIV DATA] option, built into eIV to purge data. It allows old data to be purged, but retains at least the last 6 months. Data older than 6 months in these files is not current enough to be useful. There are instructions on how to run the purge later in this patch description. If the files have not been recently purged, this purge may result in significant journaling activity that could fill up journal disks. System managers should be made aware so that journal growth can be monitored and managed accordingly.

Unless your site routinely runs the purge, it is CRITICAL that the purge is executed prior to the install! The purge should NOT be run on the same night as the installation of this patch.

If for some reason the installer does not run the purge, the conversions will take significantly longer and potential for journaling and installation issues increase.

Finally, since the post installation takes quite a while depending on the site, it is IMPERATIVE that this patch is queued for installation. This is also explained in greater detail in the patch installation instructions later in this patch description.

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This Integrated Billing (IB) patch introduces substantial changes to Vista's electronic Insurance Verification (eIV) Eligibility Inquiry and Response Processing in order to meet the Committee on Operating Rules for Information Exchange (CORE) Operating Rules.

Complete list of patch items:

1. Allow Vista to accept all X12N/5010 codes and qualifiers without validation since they have already been validated by the Eligibility Communicator (EC) at the Financial Services Center (FSC) in Austin prior to transmission to the VA Medical Centers (VAMC).
2. Allow Vista to accept, store and display additional policy/benefit information sent from payers which include Military Personal Information (X12N/5010 MPI), Provider Information (X12N/5010 PRV) and Health Care Diagnosis Code Information (X12N/5010 HI).
3. Provide the ability for users to view the AAA Error Reporting Codes and corresponding textual description in the Response Report View of Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS] when an Error Reporting Code is received in response to an X12N/5010 Health Care Eligibility Benefits Inquiry (270).
4. Transmit additional statistical information in the daily eIV registration message (HL7 MFN message) to the FSC.
5. Transmit the NAME OF INSURED (#17) Field of the INSURANCE TYPE SUB-FILE (#2.312) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is a value in the NAME OF INSURED (#17) field.
6. Allow Vista to receive, store and display the AAA additional Error Message Text on the Response Report View of the Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS] when received in an X12N/5010 Health Care Eligibility Benefits Response.
7. A new option, Update Subscriber Info [IBCN UPDATE SUBSCRIBER INFO], required to be scheduled upon installation, which updates

subscriber fields in the INSURANCE TYPE SUB-FILE (#2.312), with the values stored in the PATIENT FILE (#2), when the PT. RELATIONSHIP - HIPAA (#4.03) field is self (18) and the field is blank and the insurance policy is Active. The option will then be added to the MCCR SYSTEM DEFINITION MENU [IB SYSTEM DEFINITION MENU] and require the IB SUPERVISOR key for future periodic use.

8. Remove Data from 11 Default Service Types codes stored in the IB SITE PARAMETERS FILE (#350.9) and replace with the default SERVICE TYPE CODE 30 - Health Benefit Plan Coverage.

9. Remove any site selected service type codes from the IB SITE PARAMETERS FILE (#350.9).

10. Remove Medicare Insurance Intake option [IBCN MEDICARE INSURANCE INTAKE].

11. A new Worklist/report, Medicare Potential COB Worklist [IBCNE POTENTIAL COB LIST], of those patients whom Medicare has identified in a 271 HL7 response message as having insurance subsequent to their Medicare insurance.

12. Provide the ability for users to select an eligibility date for the Request Electronic Insurance Inquiry [IBCNE REQUEST INQUIRY] that is within the last 12 months or the end of the current month, defaulting to today's date if left blank.

13. Creation of Data Dictionary fields to allow the storage of X12N/5010 Health Care Eligibility Benefits Response (271) data elements to better align with HIPAA data lengths. Since many of the requested fields part of Integration Control Registration Agreements (DBIA) with other VistA Packages, the use of the larger storage capabilities will be unavailable until the subscribing packages have sufficient time to be remediated.

14. Reports and screen displays were modified to allow the display of increased field lengths above. Even though most of the increased field lengths will not be available until other packages using these fields are remediated, the reports and screen needed to be changed to allow for that eventuality.

Patch Components

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The following is a list of field modifications included in this patch:

Files & Fields Associated:

File Name (#)	Sub-file Name (#)	Field Name (Number)	New/Modified/ Deleted
PATIENT (#2)			Modified
	INSURANCE TYPE sub-file (#2.312)		Modified
		*SUBSCRIBER ID (#1)	Modified
		INSURED'S STREET 1 (#3.06)	Modified
		INSURED'S STREET 2 (#3.07)	Modified

	INSURED'S CITY (#3.08)	Modified
	NAME OF INSURED (#7.01)	New
	SUBSCRIBER ID (#7.02)	New
	MILITARY INFO STATUS CODE (#12.01)	New
	MILITARY EMPLOYMENT STATUS (#12.02)	New
	MILITARY GOVT AFFILIATION CODE (#12.03)	New
	MILITARY PERSONNEL DESCRIPTION (#12.04)	New
	MILITARY SERVICE RANK CODE (#12.05)	New
	DATE TIME PERIOD FORMAT QUAL (#12.06)	New
	DATE TIME PERIOD (#12.07)	New
	*NAME OF INSURED (#17)	Modified
HEALTH CARE CODE INFORMATION	sub-file (#2.31211)	New
GROUP REFERENCE INFORMATION	sub-file (#2.3129)	New
ELIGIBILITY/BENEFIT	sub-file (#2.322)	Modified
	ELIGIBILITY/BENEFIT INFO (#.02)	Modified
	COVERAGE LEVEL (#.03)	Modified
	INSURANCE TYPE (#.05)	Modified
	TIME PERIOD QUALIFIER (#.07)	Modified
	MONETARY AMOUNT (#.08)	Modified
	QUANTITY QUALIFIER (#.1)	Modified
	AUTHORIZATION/CERTIFICATION (#.12)	Modified
	IN PLAN (#.13)	Modified
	PROCEDURE CODING METHOD (#1.01)	Modified
	ENTITY ID CODE (#3.01)	Modified
	ENTITY TYPE (#3.02)	Modified
	ENTITY ID QUALIFIER (#3.05)	Modified
	ENTITY RELATIONSHIP CODE (#3.06)	New
	LOCATION QUALIFIER (#4.08)	Modified
	PROVIDER CODE (#5.01)	Modified
	REFERENCE ID QUALIFIER (#5.03)	Modified
CONTACT INFORMATION	sub-file (#2.3226)	Modified
	*COMMUNICATION NUMBER (#.03)	Modified
	COMMUNICATION QUALIFIER (#.04)	Modified
	COMMUNICATION NUMBER (#1)	New
HEALTHCARE SERVICES	DELIVERY sub-file (#2.3227)	Modified
	QUANTITY QUALIFIER (#.03)	Modified
	UNITS OF MEASUREMENT (#.05)	Modified
	TIME PERIOD QUALIFIER (#.07)	Modified
	DELIVERY FREQUENCY (#.08)	Modified
	DELIVERY PATTERN (#.09)	Modified
SUBSCRIBER DATES	sub-file (#2.3228)	Modified
	DATE QUALIFIER (#.03)	Modified
	DATE FORMAT (#.04)	Modified
SUBSCRIBER ADDITIONAL INFO	sub-file (#2.3229)	Modified
	PLACE OF SERVICE (#.02)	Modified
	QUALIFIER (#.04)	Modified
	NATURE OF INJURY CODE (#.05)	New
	NATURE OF INJURY CATEGORY (#.06)	New
	NATURE OF INJURY TEXT (#.07)	New
SUBSCRIBER REFERENCE ID	sub-file (#2.32291)	Modified
	REFERENCE ID QUALIFIER (#.03)	Modified
SERVICE TYPES	sub-file (#2.32292)	Modified
	SERVICE TYPES (#.01)	Modified
GROUP PROVIDER INFO	sub-file (#2.332)	New

IB SITE PARAMETERS (#350.9)		Modified
DEFAULT SERVICE TYPE CODE 2 (#60.02)		Modified
DEFAULT SERVICE TYPE CODE 3 (#60.03)		Modified
DEFAULT SERVICE TYPE CODE 4 (#60.04)		Modified
DEFAULT SERVICE TYPE CODE 5 (#60.05)		Modified
DEFAULT SERVICE TYPE CODE 6 (#60.06)		Modified
DEFAULT SERVICE TYPE CODE 7 (#60.07)		Modified
DEFAULT SERVICE TYPE CODE 8 (#60.08)		Modified
DEFAULT SERVICE TYPE CODE 9 (#60.09)		Modified
DEFAULT SERVICE TYPE CODE 10 (#60.1)		Modified
DEFAULT SERVICE TYPE CODE 11 (#60.11)		Modified
LIMIT LENGTH OF EIV FIELDS? (#62.01)		New
GROUP INSURANCE PLAN (#355.3)		Modified
*GROUP NAME (#.03)		Modified
*GROUP NUMBER (#.04)		Modified
GROUP NAME (#2.01)		New
GROUP NUMBER (#2.02)		New
INSURANCE BUFFER (#355.33)		Modified
SERVICE DATE (#.18)		New
*GROUP NAME (#40.02)		Modified
*GROUP NUMBER (#40.03)		Modified
*SUBSCRIBER ID (#60.04)		Modified
*NAME OF INSURED (#60.07)		Modified
PT. RELATIONSHIP - HIPAA (#60.14)		Modified
GROUP NAME (#90.01)		New
GROUP NUMBER (#90.02)		New
SUBSCRIBER ID (#90.03)		New
NAME OF INSURED (#91.01)		New
IIV RESPONSE (#365)		Modified
*NAME OF INSURED (#1.01)		Modified
*SUBSCRIBER ID (#1.05)		Modified
*GROUP NAME (#1.06)		Modified
*GROUP NUMBER (#1.07)		Modified
PT. RELATIONSHIP - HIPAA (#8.01)		Modified
MILITARY INFO STATUS CODE (#12.01)		New
MILITARY EMPLOYMENT STATUS (#12.02)		New
MILITARY GOVT AFFILIATION CODE (#12.03)		New
MILITARY PERSONNEL DESCRIPTION (#12.04)		New
MILITARY SERVICE RANK CODE (#12.05)		New
DATE TIME PERIOD FORMAT QUAL (#12.06)		New
DATE TIME PERIOD (#12.07)		New
NAME OF INSURED (#13.01)		New
SUBSCRIBER ID (#13.02)		New

GROUP NAME (#14.01)	New
GROUP NUMBER (#14.02)	New
HEALTH CARE CODE INFORMATION sub-file (#365.01)	New
ELIGIBILITY/BENEFIT sub-file (#365.02)	Modified
ELIGIBILITY/BENEFIT INFO (#.02)	Modified
COVERAGE LEVEL (#.03)	Modified
INSURANCE TYPE (#.05)	Modified
TIME PERIOD QUALIFIER (#.07)	Modified
MONETARY AMOUNT (#.08)	Modified
QUANTITY QUALIFIER (#.1)	Modified
AUTHORIZATION/CERTIFICATION (#.12)	Modified
IN PLAN (#.13)	Modified
PROCEDURE CODING METHOD (#1.01)	Modified
ENTITY ID CODE (#3.01)	Modified
ENTITY TYPE (#3.02)	Modified
ENTITY ID QUALIFIER (#3.05)	Modified
ENTITY RELATIONSHIP CODE (#3.06)	New
LOCATION QUALIFIER (#4.08)	Modified
PROVIDER CODE (#5.01)	Modified
REFERENCE ID QUALIFIER (#5.03)	Modified
CONTACT PERSON sub-file (#365.03)	Modified
*COMMUNICATION NUMBER #1 (#.03)	Modified
*COMMUNICATION NUMBER #2 (#.05)	Modified
*COMMUNICATION NUMBER #3 (#.07)	Modified
COMMUNICATION NUMBER #1 (#1)	New
COMMUNICATION NUMBER #2 (#2)	New
COMMUNICATION NUMBER #3 (#3)	New
GROUP PROVIDER INFO sub-file (#365.04)	New
REJECT REASONS sub-file (#365.06)	Modified
REJECT REASON (#.03)	Modified
ACTION CODE (#.04)	Modified
ADDITIONAL MSGS sub-file (#365.061)	New
SUBSCRIBER DATES sub-file (#365.07)	Modified
DATE QUALIFIER (#.03)	Modified
GROUP REFERENCE INFORMATION sub-file (#365.09)	New
CONTACT INFORMATION sub-file (#365.26)	Modified
*COMMUNICATION NUMBER (#.03)	Modified
COMMUNICATION QUALIFIER (#.04)	Modified
COMMUNICATION NUMBER (#1)	New
HEALTHCARE SERVICES DELIVERY sub-file (#365.27)	Modified
QUANTITY QUALIFIER (#.03)	Modified
UNITS OF MEASUREMENT (#.05)	Modified
TIME PERIOD QUALIFIER (#.07)	Modified
DELIVERY FREQUENCY (#.08)	Modified
DELIVERY PATTERN (#.09)	Modified
SUBSCRIBER DATES sub-file (#365.28)	Modified
DATE QUALIFIER (#.03)	Modified
DATE FORMAT (#.04)	Modified
SUBSCRIBER ADDITIONAL INFO sub-file (#365.29)	Modified
PLACE OF SERVICE (#.02)	Modified
QUALIFIER (#.04)	Modified
NATURE OF INJURY CODE (#.05)	New
NATURE OF INJURY CATEGORY (#.06)	New
NATURE OF INJURY TEXT (#.07)	New
SUBSCRIBER REFERENCE ID sub-file (#365.291)	Modified
REFERENCE ID QUALIFIER (#.03)	Modified
SERVICE TYPES sub-file (#365.292)	Modified

	SERVICE TYPES (#.01)	Modified
X12 271	REFERENCE IDENTIFICATION (#365.028)	Modified
X12 271	UNITS OF MEASUREMENT (#365.029)	New
X12 271	ENTITY RELATIONSHIP CODE (#365.031)	New
X12 271	DATE FORMAT QUALIFIER (#365.032)	New
X12 271	YES/NO RESPONSE CODE (#365.033)	New
X12 271	LOCATION QUALIFIER (#365.034)	New
X12 271	PROCEDURE CODING METHOD (#365.035)	New
X12 271	DELIVERY PATTERN (#365.036)	New
X12 271	PATIENT RELATIONSHIP (#365.037)	New
X12 271	INJURY CATEGORY (#365.038)	New
X12 271	MILITARY PERSONNEL INFO STATUS CODE (#365.039)	New
X12 271	MILITARY GOVT SERVICE AFFILIATION (#365.041)	New
X12 271	MILITARY SERVICE RANK (#365.042)	New
X12 271	ENTITY TYPE QUALIFIER (#365.043)	New
X12 271	CODE LIST QUALIFIER (#365.044)	New
X12 271	NATURE OF INJURY CODES (#365.045)	New
X12 271	MILITARY EMPLOYMENT STATUS CODE (#365.046)	New
IIV	TRANSMISSION QUEUE (#365.1)	Modified
	SERVICE TYPE CODE (#.2)	New
IIV	RESPONSE REVIEW (#365.2)	New

Bulletins Associated:

Bulletin Name		New/Modified/ Deleted
-----		-----
N/A		

Dialogs Associated:

Dialog Name		New/Modified/ Deleted
-----		-----
N/A		

Forms Associated:

Form Name	File Name (Number)	New/Modified/ Deleted
-----	-----	-----
N/A		

Functions Associated:

Function Name		New/Modified/ Deleted
-----		-----
N/A		

HL Logical Link:

HL Logical Name		New/Modified/ Deleted
-----		-----
N/A		

HL7 Application Parameters:

HL7 Parameter Name		New/Modified/ Deleted
-----		-----
N/A		

HLO Application Registry:

HLO Registry Name		New/Modified/ Deleted
-----		-----
N/A		

Help Frames Associated:

Help Frame Name		New/Modified/ Deleted
-----		-----
N/A		

Mail Groups Associated:

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

Options Associated:

Option Name	Type	New/Modified/ Deleted
-----	----	-----
MCCR System Definition Menu [IB SYSTEM DEFINITION MENU]	menu	Modified
Medicare Insurance Intake [IBCN MEDICARE INSURANCE INTAKE]	run routine	Delete
Update Subscriber Info [IBCN UPDATE SUBSCRIBER INFO]	run routine	New
eIV Menu[IBCNE IIV MENU]	menu	Modified
Medicare Potential COB Worklist[IBCNE POTENTIAL COB LIST]	run routine	New

Parameter Definitions:

Parameter Name -----	New/Modified/ Deleted -----
N/A	

Parameter Template:

Template Name -----	New/Modified/ Deleted -----
N/A	

Protocols Associated:

Protocol Name -----	New/Modified/ Deleted -----
IBCNE MEDICARE COB	New
IBCNE MEDICARE COB AC	New
IBCNE MEDICARE COB CS	New
IBCNE MEDICARE COB DISP	New
IBCNE MEDICARE COB EE	New

Remote Procedures Associated:

Remote Procedure Name -----	New/Modified/ Deleted -----
N/A	

Security Keys Associated:

Security Key Name -----	New/Modified/ Deleted -----
N/A	

Templates, Input Associated:

Template Name -----	Type ----	File Name (Number) -----	New/Modified/ Deleted -----
IBCN PATIENT INSURANCE	Input	PATIENT (#2)	Modified
IBCNE GENERAL PARAMETER EDIT	Input	IB SITE PARAMETERS (#350.9)	Modified

Templates, List Associated:

Template Name	Type	New/Modified/ Deleted
---------------	------	--------------------------

-----	----	-----
IBCNE	List	Modified
ELIGIBILITY/BENEFIT		
INFO		
IBCNE MEDICARE	List	New
COB DISPLAY		
IBCNE MEDICARE	List	New
COB LIST		

Templates, Print Associated:

Template Name	Type	File Name (Number)	New/Modified/ Deleted
-----	----	-----	-----
N/A			

Templates, Sort Associated:

Template Name	Type	File Name (Number)	New/Modified/ Deleted
-----	----	-----	-----
N/A			

Additional Information:

N/A

New Service Requests (NSRs)

-----  
20110503 - Electronic Data Interchange (EDI) New Standards and Operating  
Rules (Veterans Health Administration) VHA Provider-Side TCRs

Patient Safety Issues (PSIs)

-----  
N/A

Remedy Ticket(s) & Overview

-----  
N/A

Test Sites:

-----  
Wilmington, DE  
Madison, WI  
Memphis, TN  
Denver, CO (East Colorado HCS)

## 2.2 Pre/Post Installation Overview

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Please read this patch description in its entirety before installing.

The post installation routine of this patch contains significant data conversions. A purge of some of the eIV data files, IIV RESPONSE (#365) and IIV TRANSMISSION QUEUE (#365.1), greatly reduces the conversion time. When the purge was run at test sites prior to the install, the installation of this patch took between 1-4 hours. When the files were not purged prior to the install, the installation did not complete in a reasonable amount of time.

Some sites have not purged eIV data in a long time, if ever. There is an option, Purge eIV Transactions [IBCNE PURGE IIV DATA] option, built into eIV to purge data. It allows old data to be purged, but retains at least the last 6 months. Data older than 6 months in these files is not current enough to be useful. There are instructions on how to run the purge later in this patch description. If the files have not been recently purged, this purge may result in significant journaling activity that could fill up journal disks. System managers should be made aware so that journal growth can be monitored and managed accordingly.

Unless your site routinely runs the purge, it is CRITICAL that the purge is executed prior to the install! The purge should NOT be run on the same night as the installation of this patch.

If for some reason the installer does not run the purge, the conversions will take significantly longer and potential for journaling and installation issues increase.

Finally, since the post installation takes quite a while depending on the site, it is IMPERATIVE that this patch is queued for installation. This is also explained in greater detail in the patch installation instructions later in this patch description.

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### Pre/Post Installation Overview

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1. As part of the requirement to accept all X12 codes and qualifiers already validated prior to being sent to VistA in the 271 transaction from FSC's Eligibility Communicator, a number of data elements contained in entries in the IIV RESPONSE file (#365) and in the INSURANCE TYPE sub-file (#2.312) of the PATIENT file (#2) need to be converted from a SET OF CODES to POINTERS to specific code entries in the various X12 files. The post-install implements this data conversion. It first converts the entries in the IIV RESPONSE (#365) file and then continues with the entries in the INSURANCE TYPE (#2.312) sub-file.

Although entries in the INSURANCE TYPE (#2.312) file CANNOT be purged, it is strongly recommended that any entries in the IIV RESPONSE file (#365) that are older than 6 months be purged. This purge can have a significant impact on how long it takes to run the install with respect to the data conversion depending when the last time this file was purged. In some cases it has never been purged and contains almost ten years of response data. Please refer to the pre-installation instructions for performing the purge.

2. In order to satisfy the requirement of being able to store longer fields, a number of fields needed to be duplicated and the post-install will copy data from the shorter fields to the new, longer fields.

3. A one-time subscriber update utility must be scheduled upon installation of the patch. Unless the installation is queued, the post-install will prompt the installer of the patch to schedule this activity for off-hours. If the installation is queued, the new update utility will be scheduled for Tomorrow at 9 PM. This is in order to give the conversions time to complete. NOTE: This part of the process does NOT require that IB users be off the system, or un-scheduling of the eIV Nightly Process [IBCNE IIV BATCH PROCESS] option.

4. The eIV Nightly Process [IBCNE IIV BATCH PROCESS] option will need to be unscheduled before performing the installation of the patch. Once the installation and post-install conversion procedures are completed, the option will need to be rescheduled.

## 2.3 Installation Instructions

### Pre-Installation Instructions

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The following 2 tasks should be performed before installing IB\*2\*497.

#### 1. Purge eIV Transactions [IBCNE PURGE IIV DATA] option

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To help reduce the time it takes to perform the installation due to the data conversion, it is strongly recommended that a day or two before installing the patch, the Purge eIV Transactions [IBCNE PURGE IIV DATA] option should be run in order to purge the eligible response records. This option schedules the purge to run at 8 pm TODAY. If it is already past 8 PM today, it should start up almost immediately.

Note: Please make sure the purge has completed prior to running the install. The purge process does NOT require that IB users be off the system, or un-scheduling of the eIV Nightly Process [IBCNE IIV BATCH PROCESS] option.

Example of running the eIV option below:

```
Select OPTION NAME: IBCNE PURGE IIV DATA      Purge eIV Transactions
Purge eIV Transactions
```

Purge Electronic Insurance Verification (eIV) Data Files

This option will allow you to purge data from the eIV Response File (#365) and the eIV Transmission Queue File (#365.1). The data must be at least six months old before it can be purged. Only insurance transactions that have a transmission status of "Response Received", "Communication Failure", or "Cancelled" may be purged. You will be allowed to select a date range for this purging. The default beginning date will be the date of the oldest eligible record in the system. The default ending date will be six months ago from today's date. You may modify this default date range. However, you may not select an ending date that is more recent than six months ago.

Enter the purge begin date: 10/10/2003// (OCT 10, 2003)

Enter the purge end date: 03/05/2013// (MAR 05, 2013)

You want to purge all eIV data created between 10/10/2003 and 03/05/2013.

OK to continue? NO// YES

Task# 155226 has been scheduled to purge the eIV data tonight at 8:00 PM.

2. eIV Nightly Process [IBCNE IIV BATCH PROCESS] option

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Since the installation of this patch could take a number of hours to complete due to the conversion procedures, it will be necessary to unschedule the eIV Nightly Process [IBCNE IIV BATCH PROCESS] option before installing the patch. An example of unscheduling this task below:

Select Taskman Management <TEST ACCOUNT> Option: SCHEDULE/Unschedule Options

Select OPTION to schedule or reschedule: IBCNE IIV BATCH PROCESS  
eIV NIGHTLY PROCESS

...OK? Yes// (Yes) (R)

Edit Option Schedule

Option Name: IBCNE IIV BATCH PROCESS

Menu Text: eIV NIGHTLY PROCESS

TASK ID: 279418

---

QUEUED TO RUN AT WHAT TIME: SEP 4,2013@07:00 @ ? Enter the '@' sign.

This will automatically delete the date/time

DEVICE FOR QUEUED JOB OUTPUT:

QUEUED TO RUN ON VOLUME SET:

RESCHEDULING FREQUENCY: 1D

TASK PARAMETERS:

SPECIAL QUEUEING:

---



COMMAND: E ? Exit, You're done  
help Insert

Press <PF1>H for

## Installation Instructions

---

It is *strongly* recommended that this patch be installed outside of normal working hours. This patch contains multiple file/field conversions and running time depends on a number of factors. Running time could be anywhere from a couple hours to numerous hours to install. Instructions are provided for running install in background.

\*\*\*\* NO INTEGRATED BILLING USERS SHOULD BE ON THE SYSTEM DURING INSTALLATION OF THIS PATCH. \*\*\*\*

\*\*\*\* Do not install this patch when the eIV NIGHTLY PROCESS [IBCNE IIV BATCH PROCESS] background job is running or scheduled to run. Please refer to the Pre-installation instructions for the unscheduling of this option.\*\*\*\*

There are no additional menu options to disable.

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 option. When prompted for the INSTALL enter the patch #(IB\*2.0\*497):
  - 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 DD's 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, DD's, 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 Rebuild Menu Trees Upon Completion of Install? YES//'

Options are being added as well as removed, so Rebuilding Menu Trees is recommended.

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

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

Again, no Integrated Billing Users should be on the system and install Should occur outside of normal working hours.

8. A one-time subscriber update utility must be scheduled upon installation of the patch. During installation, the post-install routine prompts for the installer to schedule the one time subscriber update utility and will not complete installation until it is scheduled. If the install is queued to run, it will automatically schedule this utility to run TOMORROW @ 9PM. \*\*\*Queuing install is strongly recommended\*\*\*

\*\*\*\*\* INSTRUCTION FOR QUEUEING INSTALL \*\*\*\*\*

- 8a. At the 'DEVICE:' prompt, enter 'Q' for Queue to run this in background. You will then be prompted for 'DEVICE:' again. This is for where you would like the output from the Queued install to be directed. You may enter NULL, HFS, or any other DEVICE that allows it to be accessed from a Queued job. If you choose not to queue the install, there is a good chance that this install will not complete without experiencing a network timeout and will need to be restarted. While it was written so that the post-install could pick up where it left off, the post-install conversion needs to complete as close to the install which includes the data dictionary changes as possible.

\*\*\*\*\* INSTRUCTION FOR RUNNING INSTALL IN FOREGROUND \*\*\*\*\*

- 8b. At the 'DEVICE' prompt, hit the return key which will enable the Install to run in the foreground. Installation results are displayed to the screen. The prompt to schedule the one-time subscriber update utility is issued to the installer. The following shows an example of the message and then the date/time prompt that is generated:

Creating Task to update the Insurance Type File...

\*\*\*\*\* IMPORTANT!! \*\*\*\*\*

This option will scan through the entire Patient File for patients with insurance where the relationship to insured is self. Certain fields in Insurance Type sub-file will be updated to match the patient data if it does not already exist. This will take a while and must be queued to run in the background when there are few users on the system. The default is Tomorrow at 9:00 p.m. AGAIN PLEASE NOTE: This tasked job does NOT require that IB users be off the system, or un-scheduling of the eIV NIGHTLY PROCESS [IBCNE IIV BATCH PROCESS] option when it runs.

Enter date/time to queue the option: T+1@2100//

Update Subscriber Information Scheduled for SEP 06, 2013@21:00

## Post-Installation Instructions

---

1. In order to verify the post-install routine was run successfully, please examine the patch entry in the INSTALL file and report any error messages to Product Support.
2. After the installation has completed, and if allowed by your Kernel site parameter configuration, confirm the post-install routine, IBY497PO, was removed.
3. Once the patch has COMPLETED INSTALLATION, which can take several hours, reschedule the eIV NIGHTLY PROCESS [IBCNE IIV BATCH PROCESS] option that was unscheduled at pre-installation.

### Routine Information:

=====

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

```
;2.0;INTEGRATED BILLING;**[Patch List]**;21-MAR-94;Build 120
```

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: IBCNBAC		
Before: B51548829	After: B51549169	**184,497**
Routine Name: IBCNBAR		
Before: B44012684	After: B44889067	**82,240,345,413,416,497**
Routine Name: IBCNBCD		
Before: B87228703	After: B99276499	**82,251,361,371,416,438,452,497**
Routine Name: IBCNBEE		
Before: B46620313	After: B45711543	**82,184,252,251,356,361,371,377,416,438,452,497**
Routine Name: IBCNBES		
Before: B7989957	After: B8711337	**82,184,345,438,497**
Routine Name: IBCNBES1		
Before: B5819262	After: B5819713	**141,497**
Routine Name: IBCNBLE		
Before: B85092127	After: B105786784	**82,231,184,251,371,416,435,452,497**
Routine Name: IBCNBLP		
Before: B24695524	After: B25507553	**82,497**
Routine Name: IBCNBMI		
Before: B90850379	After: B91864404	**82,184,246,251,299,345,361,371,413,416,438,452,497**
Routine Name: IBCNBU1		
Before: B33733092	After: B34498281	**82,184,263,438,497**
Routine Name: IBCNEBF		
Before: B46987961	After: B46385823	**184,271,361,371,416,438,497**
Routine Name: IBCNEDE		
Before: B19636990	After: B34057908	**184,271,300,416,438,497**
Routine Name: IBCNEDE1		
Before: B43189276	After: B44623085	**184,271,416,438,435,467,497**
Routine Name: IBCNEDE5		
Before: B26929333	After: B28666402	**184,271,416,497**

Routine Name: IBCNEDE6	Before: B32927570	After: B32414593	**184,271,345,416,497**
Routine Name: IBCNEDE7	Before: B24645310	After: B27880444	**271,416,438,497**
Routine Name: IBCNEDST	Before: n/a	After: B52803166	**497**
Routine Name: IBCNEHL1	Before: B244020766	After: B206919324	**300,345,416,444,438,497**
Routine Name: IBCNEHL2	Before: B62824990	After: B70236887	**300,345,416,438,497**
Routine Name: IBCNEHL3	Before: B72667613	After: B168485042	**300,416,497**
Routine Name: IBCNEHL4	Before: B136544352	After: B174356077	**300,416,438,497**
Routine Name: IBCNEHL5	Before: n/a	After: B11250093	**497**
Routine Name: IBCNEHLM	Before: B21127231	After: B26579443	**184,251,300,416,438,497**
Routine Name: IBCNEHLQ	Before: B43557440	After: B44383583	**184,271,300,361,416,438,467,497**
Routine Name: IBCNEHLU	Before: B53561238	After: B88168048	**184,300,416,438,497**
Routine Name: IBCNEQU	Before: B109122026	After: B126099513	**184,271,416,438,497**
Routine Name: IBCNERPE	Before: B42391865	After: B60593817	**271,300,416,438,497**
Routine Name: IBCNERPI	Before: n/a	After: B43723857	**497**
Routine Name: IBCNERTQ	Before: B45372080	After: B44184624	**438,467,497**
Routine Name: IBCNES	Before: B25439392	After: B28429551	**416,438,497**
Routine Name: IBCNES1	Before: B120790247	After: B145502085	**416,438,497**
Routine Name: IBCNES3	Before: n/a	After: B25873283	**497**
Routine Name: IBCNESI	Before: n/a	After: B17756591	**497**
Routine Name: IBCNESI1	Before: n/a	After: B73077962	**497**
Routine Name: IBCNESI2	Before: n/a	After: B50676612	**497**
Routine Name: IBCNEUT1	Before: B33603643	After: B35326232	**184,497**
Routine Name: IBCNEUT4	Before: B50167663	After: B50266196	**184,271,345,416,497**
Routine Name: IBCNSC4	Before: B17661433	After: B18086570	**43,85,103,251,416,497**
Routine Name: IBCNSEVT	Before: B2530934	After: B4726698	**6,497**
Routine Name: IBCNSJ3	Before: B16975505	After: B17659726	**28,497**
Routine Name: IBCNSM31	Before: B20882944	After: B21224087	**6,28,68,413,497**
Routine Name: IBCNSM5	Before: B20324152	After: B21379064	**28,497**
Routine Name: IBCNSMM1			

Before: B25964261    After: B27818840    \*\*103,359,497\*\*  
 Routine Name: IBCNSOK  
 Before: B25432692    After: B26943633    \*\*497\*\*  
 Routine Name: IBCNSOK1  
 Before: B12417789    After: B13344891    \*\*497\*\*  
 Routine Name: IBCNSP  
 Before: B42954824    After: B48468493  
 \*\*6,28,43,52,85,251,363,371,416,497\*\*  
 Routine Name: IBCNSP0  
 Before: B34211643    After: B37737467    \*\*28,43,52,85,93,103,137,229,  
 251,363,371,399,438,458,497\*\*  
 Routine Name: IBCNSP01  
 Before: B38322308    After: B52258890  
 \*\*43,52,85,251,371,377,416,452,497\*\*  
 Routine Name: IBCNSP1  
 Before: B59835347    After: B60114361    \*\*6,28,40,43,52,85,103,361,371,  
 377,497\*\*  
 Routine Name: IBCNSP3  
 Before: B35837178    After: B38854605    \*\*28,52,85,251,371,497\*\*  
 Routine Name: IBCNSU2  
 Before: B19118425    After: B19732446    \*\*28,62,497\*\*  
 Routine Name: IBCNSU41  
 Before: B21365764    After: B22019975    \*\*52,211,240,497\*\*  
 Routine Name: IBCNUPD  
 Before:            n/a    After: B15205533    \*\*497\*\*  
 Routine Name: IBJPI5  
 Before: B37149088    After:    B4489364    \*\*438,497\*\*  
 Routine Name: IBJTCA1  
 Before: B53091604    After: B52135617    \*\*39,80,106,137,223,276,363,  
 384,432,452,473,497\*\*  
 Routine Name: IBY497PO  
 Before:            n/a    After: B137982293    \*\*497\*\*  
  
 Routine list of preceding patches: 62, 141, 359, 458, 467, 473

*(This page included for two-sided copying.)*

## 3 Enhancements

The following features in VistA, Integrated Billing are affected by this effort:

### 3.1 Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS]

- **AAA Errors – Response Report**  
Provides the ability for users to view the Error Reporting Codes and corresponding textual description in the Response Report View of the Insurance Buffer when an error Reporting Code is received in response to an X12N/5010 Health Care Eligibility Benefits Inquiry (270).
- **X12N/5010 271 Code Sets – Expanded Benefits**  
Provides the ability to receive the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.
- **X12N/5010 271 Code Sets – Expanded Benefits**  
Provides the ability to store the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.
- **X12N/5010 271 Code Sets – Expanded Benefits**  
Provides the ability to display the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.

### 3.2 HL7 Transactions Related to 270/271 Transactions/Daily Registration Messages

- **Daily Statistics to FSC**  
Transmits additional statistical information in the daily eIV registration message (HL7 MFN message) to the FSC in Austin, Texas.
- **270 - Transmit Insured Name – Patient Subscriber**  
Transmits the NAME OF INSURED Field (2.312:17) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is a value in the NAME OF INSURED field.
- **270 - Transmit Patient Name – Patient Subscriber**  
Transmits the NAME Field (2: .01) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is no value in the Name of Insured field.
- **270 - Transmit Patient Name – Patient Not Subscriber**  
Continues to transmit the NAME Field (2: .01) in the PID segment and the NAME OF INSURED field in the GT1 segment (2.312:17) of the 270 HL7 message when the patient is not the subscriber.
- **270 - Extract – Default Service Type Codes**  
Automatically includes the 30-Health Benefit Plan Coverage default Service Type code replacing the current list of codes in the NTE segment of the 270 HL7 messages transmitted automatically through the buffer extract.

- **270 – Receive EB\*V~MSG\*additional Error Message Text~ – AAA Error Message Text**  
Provides the ability to receive the AAA additional Error Message Text when received in an X12N/5010 Health Care Eligibility Benefits Response.
- **270 – Store EB\*V~MSG\*additional Error Message Text~ – AAA Error Message Text**  
Provides the ability to store the AAA additional Error Message Text when received in an X12N/5010 Health Care Eligibility Benefits Response.
- **270 – Display EB\*V~MSG\*additional Error Message Text~ – AAA Error Message Text**  
Provides the ability to display the AAA additional Error Message Text on the Response Report View of the Insurance Buffer when received in an X12N/5010 Health Care Eligibility Benefits Response.
- **270 – Transmit Registration Message after initial installation of the Patch**  
Transmits a registration message upon initial installation of the software into production at each VAMC informing FSC of the upgrade to the new interface version.

### **3.3 Patient Insurance Info View/Edit [IBCN PATIENT INSURANCE]**

- **Update Subscriber Information**  
Includes a new option required to be scheduled to update the subscriber fields in the Insurance Type file, with the values stored in the Patient file, upon installation of the software at a site when the patient's relationship to the insured is self (18) and the field is blank and the insurance policy is Active.

### **3.4 MCCR System Definition Menu [IB SYSTEM DEFINITION MENU]**

- **Add New Option for Subscriber Information**  
Includes a new option to provide the ability for users holding the IB SUPERVISOR KEY to update subscriber fields in the Insurance Type sub-file for all patients, with the values stored in the Patient file, when the patient's relationship to the insured is self (18) and the field is blank and the insurance policy is Active.
- **Store Default Service Type Codes**  
Stores only Service Type Code 30 – Health Benefit Plan Coverage in the IB Site Parameters file accessible from [MCCR Site Parameter Display/Edit].
- **Site-defined Service Type Codes**  
No longer allow users to define Service Type codes by site, to be included automatically in 270 HL7 messages.
- **Remove Existing Site-defined Service Type Codes**  
Updates the IB Site Parameters file (350.9) to remove all site-defined Service Type codes after the software is installed.
- **Site-defined Service Type Codes Screen Display**  
No longer contains a section on the [MCCR Site Parameter Display/Edit] ListManager screen to display Service Type codes by site.

### **3.5 Medicare Insurance Intake [IBCN MEDICARE INSURANCE INTAKE]**

- **Remove Medicare Insurance Intake Option**

No longer provides the ability for users to enter Patient Insurance information through the Medicare Insurance Intake option, [IBCN MEDICARE INSURANCE INTAKE].

### **3.6 Integrated Billing Reports**

- **Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]**
- **Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]**
- **Patient Insurance Info View/Edit [IBCN PATIENT INSURANCE]**
- **Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS]**
- **eIV Response Report [IBCNE IIV RESPONSE REPORT]**
- **eIV Ambiguous Policy Report [IBCNE IIV AMBIGUOUS POLICY RPT]**
- **eIV Inactive Policy Report [IBCNE IIV INACTIVE POLICY RPT]**

### **3.7 Request Electronic Insurance Inquiry [IBCNE REQUEST INQUIRY]**

- **Eligibility Date Criteria**
- **Eligibility Date Default**
- **Eligibility Date Transmission**
- **270 Individual Request - Default Service Type Codes**
- **270 Individual Request - Default Service Type Codes**