# Medical Care Collection Fund (MCCF) Electronic Data Interchange (EDI) Transaction Applications Suite (TAS) ePharmacy Build 2

## Electronic Claims Management Engine BPS*1.0*22
## Outpatient Pharmacy PSO*7.0*478
## Consolidated Mail Outpatient Pharmacy PSX*2.0*81

## Deployment, Installation, Back-Out, and Rollback Guide

## Version 5.0



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## Revision History

| Date | Version | Description | Author |
|------|---------|-------------|--------|
| July 2017 | 1.0 | Initial Version | REDACTED |
| August 2017 | 2.0 | Updated Acceptance Criteria | REDACTED |
| August 2017 | 3.0 | Changed two instances of "FTP" to "SFTP" | REDACTED |
| October 2017 | 4.0 | Updated acceptance criteria for US576 | REDACTED |
| October 2017 | 5.0 | Removed reference to Albany FTP site | REDACTED |

# 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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# Table of Tables

# 1  Introduction

This document describes how to deploy and install the multi-build BPS PSO PSX BUNDLE 10.0 (which includes BPS*1.0*22, PSO*7.0*478, PSX*2.0*81) and how to back-out the product and rollback to a previous version or data set.

## 1.1 Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom the multi-build BPS PSO PSX BUNDLE 10.0 (which includes BPS*1.0*22, PSO*7.0*478, PSX*2.0*81) 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.

## 1.2 Dependencies

BPS*1.0*20 must be installed BEFORE BPS*1*22.
PSO*7.0*367 and PSO*7.0*448 must be installed BEFORE PSO*7*478.
PSX*2.0*70, PSX*2.0*77, and PSX*2.0*79 must be installed BEFORE PSX*2*81.

## 1.3 Constraints

This patch is intended for a fully patched VistA system.

# 2  Roles and Responsibilities

Table 1: Deployment, Installation, Back-out, and Rollback Roles and Responsibilities

| ID | Team | Phase / Role | Tasks | Project Phase (See Schedule) |
|---|---|---|---|---|
| 1 | VA OI&T, VA OI&T 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 & VIP Release Agent Approval | Deployment | Test for operational readiness | Testing |
| 4 | Health product Support and Field Operations | Deployment | Execute deployment | Deployment |

| ID | Team | Phase / Role | Tasks | Project Phase (See Schedule) |
|---|---|---|---|---|
| 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 & 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 OI&T, VA OI&T Health Product Support, and MCCF EDI TAS Development Team (Halfaker) | Post Deployment | Hardware, Software and System Support | Warranty |

# 3 Deployment

The deployment is planned as a national rollout.

This section provides the schedule and milestones for the deployment.

## 3.1 Timeline

The duration of deployment and installation is 30 days, as depicted in the master deployment schedule[1].

## 3.2 Site Readiness Assessment

This section discusses the locations that will receive the deployment of the multi-build BPS PSO PSX BUNDLE 10.0 (which includes BPS*1.0*22, PSO*7.0*478, PSX*2.0*81).

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[1] Project schedule (right click and select open hyperlink to access) REDACTED

### 3.2.1 Deployment Topology (Targeted Architecture)

This multi-build BPS PSO PSX BUNDLE 10.0 (which includes BPS*1.0*22, PSO*7.0*478, PSX*2.0*81) is to be nationally released to all VAMCs.

### 3.2.2 Site Information (Locations, Deployment Recipients)

The IOC sites are:
- Birmingham
- Eastern Kansas
- Lexington
- Little Rock
- Richmond

Upon national release all VAMCs are expected to install this patch prior to or on the compliance date.

### 3.2.3 Site Preparation

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

**Table 2: 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 |

## 3.3 Resources

### 3.3.1 Facility Specifics

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

**Table 3: Facility-Specific Features**

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

### 3.3.2 Hardware

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

**Table 4: 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.

### 3.3.3   Software

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

**Table 5: Software Specifications**

| Required Software | Make | Version | Configuration | Manufacturer | Other |
|---|---|---|---|---|---|
| Fully patched Electronic Claims Management Engine package within VistA | N/A | 1.0 | N/A | N/A | N/A |
| Fully patched Outpatient Pharmacy package within VistA | N/A | 7.0 | N/A | N/A | N/A |
| Fully patched Consolidated Mail Outpatient Pharmacy package within VistA | N/A | 2.0 | N/A | N/A | N/A |
| Prerequisite patches in BPS, PSO, PSX yet to be determined | N/A | Nationally released version | 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.

### 3.3.4   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.

#### 3.3.4.1   Deployment/Installation/Back-Out Checklist

The Release Management team will deploy the multi-build BPS PSO PSX BUNDLE 10.0, 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 6: 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 |

# 4  Installation

## 4.1 Pre-installation and System Requirements

Multi-build BPS PSO PSX BUNDLE 10.0 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 which communicate with the underlying operating system and hardware, thereby providing each VistA package independence from variations in hardware and operating system.

## 4.2 Platform Installation and Preparation

Refer to the BPS*1.0*22 documentation on the NPM in Forum for the detailed installation instructions. These instructions include any pre-installation steps if applicable.

## 4.3 Download and Extract Files

Refer to the BPS*1.0*22, PSO*7.0*478, PSX*2.0*81 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 and this message can be pulled from the NPM. The patches themselves are bundled together into the multi-build BPS PSO PSX BUNDLE 10.0. The host file containing these patches must be downloaded separately. The file name is BPS_1_22_PSO_PSX.KID and it can be found on the ANONYMOUS.SOFTWARE directory on any of the VistA SFTP servers (REDACTED).

## 4.4 Database Creation

Multi-build BPS PSO PSX BUNDLE 10.0 modifies the VistA database. All changes can be found on the NPM documentation for this patch.

## 4.5 Installation Scripts

No installation scripts are needed for multi-build BPS PSO PSX BUNDLE 10.0 installation.

## 4.6 Cron Scripts

No Cron scripts are needed for multi-build BPS PSO PSX BUNDLE 10.0 installation.

## 4.7 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 one of the VA's SFTP servers. The software is to be installed by each site's or region's designated VA OI&T IT OPERATIONS SERVICE, Enterprise Service Lines, Vista Applications Division[2].

## 4.8 Installation Procedure

Detailed instructions for installing the multi-build BPS PSO PSX BUNDLE 10.0 (which includes BPS*1.0*22, PSO*7.0*478, PSX*2.0*81) can be found on the patch description for BPS*1.0*22, which can be found on the NPM. Installing the multi-build BPS PSO PSX BUNDLE 10.0 will install all three component patches (BPS*1.0*22, PSO*7.0*478, PSX*2.0*81).

## 4.9 Installation Verification Procedure

Refer to the BPS*1.0*22 documentation on the NPM for detailed installation instructions. These instructions include any post installation steps if applicable.

## 4.10     System Configuration

No system configuration changes are required for this patch.

## 4.11     Database Tuning

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

# 5  Back-Out Procedure

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

## 5.1 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 of testing during which the decision is made.

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[2] "Enterprise service lines, VAD" for short. Formerly known as the IRM (Information Resources Management) or IT support.

### 5.1.1 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.

### 5.1.2 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.

### 5.1.3 After National Release and Warranty Period

After the support 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.

## 5.2 Back-Out Considerations

Changes implemented with multi-build BPS PSO PSX BUNDLE 10.0 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 BPS PSO PSX BUNDLE 10.0 if before national release or a new multi-build if after national release.

### 5.2.1 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. Subsequent to the reversion, the performance demands on the system will be unchanged.

### 5.2.2 User Acceptance Testing

Below are the acceptance criteria for each story included in BPS PSO PSX BUNDLE 10.0.

US22
- If a claim status is "In Progress" when evaluated by the CMOP process, the process puts the prescription back on suspense. (Regression)
- If a claim status is "Paid" when evaluated by the CMOP process, the prescription transmits to CMOP. (Regression)
- The time required to receive a paid claim response can exceed the ECME timeout setting and still be transmitted to CMOP.

US115
- The option, Reprint an Outpatient Rx Label [PSO RXRPT], does not allow a user to reprint a label for a prescription with an open third party payer reject on the worklist.
- The option, Outpatient Rx Label [PSO SCRIPTALK REPRINT VISTA LB], does not allow a user to reprint a label for a prescription with an open third party reject on the worklist.

- When a user tries to reprint a label with an open reject, the reprint option displays an error message: NOT ALLOWED! Rx has OPEN 3rd Party Payer Reject.

US174
- Confirm that the file BPS NCPDP FIELD DEFS includes the entries:
  - B95-3Z Facility ID Qualifier
  - B98-34 Reconciliation ID

US178
- Confirm that the following fields are available in the Claim Log and the Claim Response Inquiry:
  - B95-3Z Facility ID Qualifier
  - B98-34 Reconciliation ID
- Confirm the Claim Response Inquiry contains the correct values for the above fields.
- Confirm the Claim Log contains the correct values for the above fields.
- Confirm the above fields only display in the Claim Log when a value is transmitted in the field.
- Confirm the above fields only display in the Claim Response Inquiry when a value is transmitted in the field.

US209
- Verify the new PR Print Report(s) action is available under VER View ePharmacy Rx.
- When a user selects the new action PR Print Report(s) within the VER View ePharmacy Rx, a list of reports available for printing is displayed and the user enters the name of the report(s) to print.
- Help text is available and displays when the user enters "?" or "??" at the select prompt.
- The user may select one report.
- Multiple reports can be selected, separated by commas.
- The Select Report to Print prompt repeats until the user hits enter without making a selection.
- If a user selects a report more than once, the report will only print once.
- Only selected reports are printed.
- The system does not display a default value when prompting the user for the names of reports to print.
- If the user enters an invalid selection, an error message will be displayed. If the invalid entry was one of many, accept the valid entries.
- An entry of "^" escapes back to the VER screen.

US576
- The CV action from the ECME User Screen prompts the user to restore the preferred view if the user has a preferred view and if the user is not currently displaying the preferred view.
- There is no default and a response is required.

US579
- The AUTO-REVERSE PARAMETER is required, accepting a value between 3 and 10. The values of 3 and 10 are valid responses.
- The help text includes valid values, a suggested setting and wording to indicate the parameter is required.
- Do not allow a user to delete the parameter.
- When the patch is installed, set the parameter to 5 if there is no value or if the value is not between 3 and 10. (The value should not be updated if the value of 3 or 10 is present.)
- If the parameter is set during installation, send a Mailman message to the patch installer, Greg Laird and any individual holding security key PSO EPHARMACY SITE MANAGER.

US583
- The Tax ID displays at the end of the first line of the heading of the Reject Information Screen, available from the Third Party Payer Rejects Worklist and View/Process options.
- The PCN displays next to the BIN on the Reject Information Screen, available from the Third Party Payer Rejects Worklist.
- The PCN continues to display below the BIN (no change to current functionality) on the OPECC Reject Information Screen, available from the ECME User Screen.
- The Tax ID displays at the end of the first line of the heading of the REJ OPECC Reject Information screen, available from the ECME User Screen.

US589
- The RX and FILL columns are combined, separated by "/".
- "FILL DATE" is abbreviated to "DATE".
- The new column for eligibility, titled "ELIG", is before the patient.
- The new column for drug name (approximately 18 characters) is last.

## 5.3 Back-Out Criteria

It may be decided to back out this patch if the project is canceled, the requested changes implemented by multi-build BPS PSO PSX BUNDLE 10.0 are no longer desired by VA OI&T and the ePharmacy eBusiness team, or the patch produces catastrophic problems.

## 5.4 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.

## 5.5 Authority for Back-Out

The order would come from: release coordinator (product support), portfolio director, and health product support. The order should be done in consultation with the development team and external trading partners such as FSC and the HCCH to determine the appropriate course of action. ePharmacy is tightly integrated with these external partners and a decision to back-out should not be made without their consultation.

## 5.6 Back-Out Procedure

Backing out enhancements to a VistA application is often complex. Normally, defects are repaired via a follow-up patch. The development team recommends that sites log a ticket if there is a nationally released patch to be implemented. If not, the site should contact the Enterprise Program Management Office (EPMO) team directly for specific solutions to their unique problems.

Multi-build BPS PSO PSX BUNDLE 10.0 contains the following build components:
- Routines
- File entries in the file BPS NCPDP FIELD DEFS (#9002313.91)
- Data Dictionary Changes
- Protocols

- List Templates

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 and/or restored. 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.

## 5.7 Back-out Verification Procedure

Successful back-out is confirmed by verification that the back-out patch was successfully installed.

# 6 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.

## 6.1 Rollback Considerations

Not applicable.

## 6.2 Rollback Criteria

Not applicable.

## 6.3 Rollback Risks

Not applicable.

## 6.4 Authority for Rollback

Not applicable.

## 6.5    Rollback Procedure

Not applicable.

## 6.6 Rollback Verification Procedure

Not applicable.

# Template Revision History

| Date | Version | Description | Author |
|---|---|---|---|
| March 2016 | 2.2 | Changed the title from Installation, Back-Out, and Rollback Guide to Deployment and Installation Guide, with the understanding that Back-Out and Rollback belong with Installation. | VIP Team |
| February 2016 | 2.1 | Changed title from Installation, Back-Out, and Rollback Plan to Installation, Back-Out, and Rollback Guide as recommended by OI&T Documentation Standards Committee | OI&T Documentation Standards Committee |
| December 2015 | 2.0 | The OI&T Documentation Standards Committee merged the existing *"Installation, Back-Out, Rollback Plan"* template with the content requirements in the OI&T End-user Documentation Standards for a more comprehensive Installation Plan. | OI&T Documentation Standards Committee |
| February 2015 | 1.0 | Initial Draft | Lifecycle and Release Management |