**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**

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Department of Veterans Affairs

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Product Development

Revision History

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|  |  |  |  |
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| **Date** | **Version** | **Description** | **Project Mgr/Technical Writer** |
| 11/13/17 | 2.3 | Updated Post-Install instructions | * Project ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
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| 11/03/2017 | 2.2 | Updated sections 1.2.1, 3.7, 5 per Product Supoort review and the expected release date | * Project ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
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| 06/14/2017 | 2.1 | Updated section 4 Pre/Post Installation Overview  | * Project ManagerREDACTED
* 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 ManagerREDACTED
* 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 ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
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| 9/13/2016 | 1.3 | Added Tucson to Section 1.3. Modified text in Section 6. | * Project ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
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| 9/6/2016 | 1.2 | CR related development added. | * Project ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
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| 2/2/2016 | 1.1 | Updated dependencies list | * Project ManagerREDACTED
* 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 ManagerREDACTED
* Lead Developer/Technical Writer REDACTED
 |

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# Introduction

## 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.

## 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.

### Additional Resources

Software and Documentation Retrieval Instructions:

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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 FB\_3\_5\_TM\_R1217.PDF

 /Security Guide

Fee Basis Install Guide FB\_3\_5\_P158\_IG.PDF

Fee Basis Release Notes FB\_3\_5\_P158\_RN.PDF

## Test Site Acknowledgment

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

* redacted

# Software Prerequisites

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

## **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 |

# Patch Components

## 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)

## Forms

N/A

## Mail Groups

**Mail Group Name New/Modified/Deleted**

 --------------- --------------------

N/A

## Options

Option Name Type New/Modified/Deleted

----------- ---- --------------------

FBAA BATCH 7YR PURGE run routine New

ZTMQUEUABLE OPTIONS menu Modified

## Protocols

N/A

## Security Keys

N/A

## 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

## Bulletins

There are no bulletins associated with this patch.

## Additional Information

No additional information is included with this installation guide.

## New Service Requests (NSRs)

There are no NSRs associated with this patch.

## Patient Safety Issues (PSIs)

There are no PSIs associated with this patch.

## Estimated Installation Time

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

# 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.

# 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.**

1. 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.
2. 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.).
3. 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>.

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

# 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.

# Routine Information

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

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

|  |  |
| --- | --- |
|  | **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 Name: FBXIP158 Before: n/a After: B8013846 \*\*158\*\* |

# 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.

## 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.

## 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)