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

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<table>
<thead>
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<th>Date</th>
<th>Version</th>
<th>Description</th>
<th>Project Mgr/Technical Writer</th>
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| 11/13/17   | 2.3     | Updated Post-Install instructions                                          | • Project Manager Therese Tarleton  
|            |         |                                                                            | • Lead Developer/Technical Writer Steve Tjernagel |
| 11/03/2017 | 2.2     | Updated sections 1.2.1, 3.7, 5 per Product Support review and the expected release date | • Project Manager Therese Tarleton  
|            |         |                                                                            | • Lead Developer/Technical Writer Steve Tjernagel |
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|            |         |                                                                            | • Lead Developer/Technical Writer Steve Tjernagel |
| 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 Warren Chave  
|            |         |                                                                            | • Lead Developer/Technical Writer Steve Tjernagel |
| 9/13/2016  | 1.3     | Added Tucson to Section 1.3. Modified text in Section 6.                  | • Project Manager Warren Chave  
|            |         |                                                                            | • Lead Developer/Technical Writer Steve Tjernagel |
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| 2/2/2016   | 1.1     | Updated dependencies list                                                 | • Project Manager |


<table>
<thead>
<tr>
<th>Date</th>
<th>Revision</th>
<th>Description</th>
<th>Contributors</th>
</tr>
</thead>
</table>
| 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. | Warren Chave  
Lead Developer/Technical Writer Steve Tjernagel  
Project Manager Warren Chave  
Lead Developer/Technical Writer Steve Tjernagel |
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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 download.vista.med.va.gov. 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: fo-hines.med.va.gov
Salt Lake City: fo-slc.med.va.gov

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

<table>
<thead>
<tr>
<th>Title</th>
<th>File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee Basis User Manual</td>
<td>FB_3_5_UM_R1217.PDF</td>
</tr>
<tr>
<td>Fee Basis Technical Manual</td>
<td>FB_3_5_TM_R1217.PDF</td>
</tr>
<tr>
<td>/Security Guide</td>
<td></td>
</tr>
<tr>
<td>Fee Basis Install Guide</td>
<td>FB_3_5_P158_IG.PDF</td>
</tr>
<tr>
<td>Fee Basis Release Notes</td>
<td>FB_3_5_P158_RN.PDF</td>
</tr>
</tbody>
</table>
1.3 Test Site Acknowledgment

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

- Omaha VA Medical Center
- VA St. Louis Health Care System
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:

<table>
<thead>
<tr>
<th>Software</th>
<th>Version</th>
<th>Required Patches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>73</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>91</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>127</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>128</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>153</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>154</td>
</tr>
<tr>
<td>Fee Basis</td>
<td>3.5</td>
<td>FB<em>3.5</em>157</td>
</tr>
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</table>
3 Patch Components

3.1 Files and Fields

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

3.2 Forms

N/A

3.3 Mail Groups

<table>
<thead>
<tr>
<th>Mail Group Name</th>
<th>New/Modified/Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

3.4 Options

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Type</th>
<th>New/Modified/Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBAA BATCH 7YR PURGE</td>
<td>run routine</td>
<td>New</td>
</tr>
<tr>
<td>ZTMQUEUABLE OPTIONS</td>
<td>menu</td>
<td>Modified</td>
</tr>
</tbody>
</table>
3.5  Protocols

N/A

3.6  Security Keys

N/A

3.7  Templates

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Type</th>
<th>File Name (Number)</th>
<th>New/Modified/Deleted</th>
</tr>
</thead>
<tbody>
<tr>
<td>FBCH EDIT PAYMENT INPUT</td>
<td>INPUT</td>
<td>FEE BASIS INVOICE (162.5)</td>
<td>Modified</td>
</tr>
<tr>
<td>FBCH ENTER PAYMENT INPUT</td>
<td>INPUT</td>
<td>FEE BASIS INVOICE (162.5)</td>
<td>Modified</td>
</tr>
<tr>
<td>FBNH EDIT PAYMENT INPUT</td>
<td>INPUT</td>
<td>FEE BASIS INVOICE (162.5)</td>
<td>Modified</td>
</tr>
</tbody>
</table>

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//' answer 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.
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:

```plaintext
;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: B2793566  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,**
Routine Information

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

Routine Name: FBAAPP0
  Before: B4309645  After: B4339891  **61,91,158**

Routine Name: FBAAUTL

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

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)