**Medical Care Collection Fund (MCCF) ePharmacy Compliance Phase 3**

**Integrated Billing (IB)**

**Version 1.0**

**RELEASE NOTES/ Installation Guide/ Rollback Plan**

**IB\*2\*550**

**August 2016**

Department of Veterans Affairs

Office of Information and Technology (OI&T)

**Table of Contents**

[1 Introduction 1](#_Toc453589417)

[1.1 Documentation and Distribution 1](#_Toc453589418)

[2 Patch Description and Installation Instructions 3](#_Toc453589419)

[2.1 Patch Description 3](#_Toc453589420)

[2.2 Pre/Post Installation Overview 7](#_Toc453589421)

[2.3 Installation Instructions 7](#_Toc453589422)

[3 Backout and Rollback Procedures 11](#_Toc453589423)

[3.1 Overview of Backout and Rollback Procedures 11](#_Toc453589424)

[3.2 Backout Procedure 11](#_Toc453589425)

[3.3 Rollback Procedure 11](#_Toc453589426)

[4 Enhancements 13](#_Toc453589427)

[4.1 System Feature: ROI Expiration Date 13](#_Toc453589428)

[4.2 System Feature: TRICARE Copay 13](#_Toc453589429)

[4.3 System Feature: Display VA Plan ID 13](#_Toc453589430)

[4.4 System Feature: Billing Determination 13](#_Toc453589431)

[4.5 System Feature: Date of Service 13](#_Toc453589432)

[4.6 System Feature: Billing Event Log 13](#_Toc453589433)

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

# Introduction

This patch has enhancements that extend the capabilities of the Veterans

Health Information Systems and Technology Architecture (VistA) electronic

pharmacy (ePharmacy) billing system. Below is a list of all the applications

involved in this project along with their patch number:

 APPLICATION/VERSION PATCH

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

 OUTPATIENT PHARMACY (OP) V. 7.0 PSO\*7\*448

 INTEGRATED BILLING (IB) V. 2.0 IB\*2\*550

 ELECTRONIC CLAIMS MANAGEMENT ENGINE (ECME) V. 1.0 BPS\*1\*20

 CONSOLIDATED MAIL OUTPATIENT PHARMACY (CMOP) V. 2.0 PSX\*2\*79

 PHARMACY DATA MANAGEMENT (PDM) V. 1.0 PSS\*1\*192

All five of these patches are being released in the Kernel Installation and

Distribution System (KIDS) multi-build distribution.

## Documentation and Distribution

Updated documentation describing the new functionality introduced by this

patch is 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 documentation directly using Secure File Transfer

Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI

Field Offices:

 Albany: REDACTED

 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 Transfer Mode

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

Release Notes/Installation Guide IB\_2\_0\_P550\_RN.PDF Binary

User Manual IB\_2\_0\_UM.PDF Binary

Technical Manual/Security Guide IB\_2\_0\_TM.PDF Binary

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

# Patch Description and Installation Instructions

## Patch Description

VistA Patch Display Page: 1

=============================================================================

Run Date: APR 21, 2016 Designation: IB\*2\*550 TEST v16

Package : INTEGRATED BILLING Priority : MANDATORY

Version : 2 Status : UNDER DEVELOPMENT

=============================================================================

Associated patches: (v)IB\*2\*416 <<= must be installed BEFORE `IB\*2\*550'

 (v)IB\*2\*516 <<= must be installed BEFORE `IB\*2\*550'

 (v)IB\*2\*526 <<= must be installed BEFORE `IB\*2\*550'

 (v)IB\*2\*534 <<= must be installed BEFORE `IB\*2\*550'

Subject: MCCF ePHARMACY COMPLIANCE PHASE 3

Category: ROUTINE

 OTHER

 ENHANCEMENT

 DATA DICTIONARY

Description:

===========

This patch has enhancements that extend the capabilities of the Veterans

Health Information Systems and Technology Architecture (VistA) electronic

pharmacy (ePharmacy) billing system. Below is a list of all the applications

involved in this project along with their patch number:

 APPLICATION/VERSION PATCH

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

 OUTPATIENT PHARMACY (OP) V. 7.0 PSO\*7\*448

 INTEGRATED BILLING (IB) V. 2.0 IB\*2\*550

 ELECTRONIC CLAIMS MANAGEMENT ENGINE (ECME) V. 1.0 BPS\*1\*20

 CONSOLIDATED MAIL OUTPATIENT PHARMACY (CMOP) V. 2.0 PSX\*2\*79

 PHARMACY DATA MANAGEMENT (PDM) V. 1.0 PSS\*1\*192

All five of these patches are being released in the Kernel Installation and

Distribution System (KIDS) multi-build distribution.

KIDS multi-build name: BPS PSO IB PSX PSS BUNDLE 9.0

 KIDS Host File name: BPS\_1\_20\_PSO\_IB\_PSX\_PSS.KID

This specific patch contains the following functionality:

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

 1. The Patient Release of Information [IBCNR RELEASE OF INFORMATION]

 option contains actions to add a new ROI and to view/edit an existing

 ROI. These actions were modified to allow the user to enter any date for

 the expiration date as long as it is after the effective date of the ROI.

 2. The e-Pharmacy Menu [IBCNR E-PHARMACY MENU] contains a new report option

 of RER ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] without

 requiring a security key.

 3. The new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] will prompt

 the user for the following:

 Beginning Expiration Date

 Ending Expiration Date

 Status of (A)ctive, (I)nactive, or (B)oth

 The beginning expiration date has a default value of T-180 and the ending

 expiration date has a default value of T+60.

 4. The new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] will display

 patient name, insurance name, date of death, effective date, expiration

 date, date added and the drug name. The report is sorted by expiration

 date in reverse chronological order.

 5. The Group Plan Worksheet Report [IBCNR GROUP PLAN WORKSHEET] will display

 the VA Plan ID instead of the Pharmacy Plan.

 6. The option Match Multiple Group Plans [IBCNR GROUP PLAN MATCH] will

 display the VA Plan ID instead of the Pharmacy Plan.

 7. The option Match Group Plan to a Pharmacy [IBCNR PLAN MATCH] will display

 the VA Plan ID instead of the Pharmacy Plan.

 8. IB Billing Determination will use the new ePharmacy Billable fields to

 assess billable status of the ePharmacy prescription.

 9. IB Billing Determination will use the new field called Sensitive

 Diagnosis Drug to determine drugs used exclusively to treat a sensitive

 diagnosis and will examine the system to find a Release of Information

 (ROI) record on file to determine if the drug is billable or not.

10. When the system automatically populates the non-billable reason and the

 associated free text ROI reason, the system will use "ROI NOT OBTAINED"

 and free text reason "NO ACTIVE/VALID ROI FOR DRUG OR INSURANCE".

11. The IB back billing processes shall use the same date of service

 algorithm used in outpatient pharmacy and in ECME. A claim can be back-

 billed through Claims Tracking and the action to Generate ECME Rx Bills.

12. The IB Billing Event Log shall contain new drug file fields in the finish

 event for billing events that do not generate a claim because of

 non-billable determination.

Patch Components:

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

Files & Fields Associated:

File Name (#) New/Modified/

 Sub-file Name (#) Field Name (Number) Deleted

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

IB NCPDP EVENT LOG (#366.14) Modified

 EVENT sub-file (#366.141) Modified

 DRUG ECME BILLABLE (#7.06) New

 DRUG ECME BILLABLE TRICARE (#7.07) New

 DRUG ECME BILLABLE CHAMPVA (#7.08) New

 DRUG SENSITIVE DIAGNOSIS (#7.09) New

Forms Associated:

 New/Modified/

Form Name File Name (Number) Deleted

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

N/A

Mail Groups Associated:

 New/Modified/

Mail Group Name Deleted

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

N/A

Options Associated:

 New/Modified/

Option Name Type Deleted

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

IBCNR E-PHARMACY MENU Modified

IBCNR EDIT PAYER run routine Delete

IBCNR ROI EXPIRATION run routine New

REPORT

Protocols Associated:

 New/Modified/

Protocol Name Deleted

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

N/A

Security Keys Associated:

 New/Modified/

Security Key Name Deleted

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

N/A

Templates Associated:

 New/Modified/

Template Name Type File Name (Number) Deleted

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

IBCNR GROUP PLAN List N/A Modified

MATCH

IBCNR PLAN MATCH List N/A Modified

Additional Information:

N/A

New Service Requests (NSRs)

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

20140411 - Medical Care Collection Fund (MCCF) ePharmacy Compliance Phase 3

Patient Safety Issues (PSIs)

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

N/A

Defect Tracking System Ticket(s) & Overview:

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

N/A

Test Sites:

-----------

VA HEARTLAND - WEST, VISN 15 (589)

LEXINGTON VAMC-LEESTOWN (596)

HUNTER HOLMES MCGUIRE HOSPITAL - RICHMOND (652)

BIRMINGHAM VAMC (521)

CENTRAL ARKANSAS HEALTH CARE SYSTEM - LITTLE ROCK (598)

Documentation Retrieval Instructions

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

Updated documentation describing the new functionality introduced by this

patch is 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 documentation directly using Secure File Transfer

Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI

Field Offices:

 Albany: REDACTED

 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 Transfer Mode

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

Release Notes/Installation Guide IB\_2\_0\_P550\_RN.PDF Binary

User Manual IB\_2\_0\_UM.PDF Binary

Technical Manual/Security Guide IB\_2\_0\_TM.PDF Binary

## Pre/Post Installation Overview

There is a post-install routine associated with this patch named

POST^IBY550PO. The purpose of the post-install routine is to:

 a. Remove the references to the Payer file (365.12) from the ePharmacy PLAN

 file (366.03). Both the data and the field definition are removed.

 b. Remove all E-PHARM payer application data from the Payer file (365.12).

 ePharmacy does not use the Payer file.

 c. Remove the E-PHARM entry from the payer application dictionary file

 (365.13).

The post-install routine is automatically deleted by the system if allowed by

your Kernel site parameters configuration. You may delete this routine if the

installation was successful and it is not automatically deleted by KIDS.

## Installation Instructions

Please see the Installation Instructions associated with patch BPS\*1.0\*20.

Routine Information:

====================

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

;;2.0;INTEGRATED BILLING;\*\*[Patch List]\*\*;21-MAR-94;Build 25

The checksums below are new checksums, and

 can be checked with CHECK1^XTSUMBLD.

Routine Name: IBCBB11

 Before: B95727608 After: B96464375 \*\*51,343,363,371,395,392,401,

 384,400,436,432,516,550\*\*

Routine Name: IBCNEHLI

 Before: B8196060 After: B7817332 \*\*184,252,251,271,300,416,550\*\*

Routine Name: IBCNRE1

 Before: B14123296 After: Delete

Routine Name: IBCNRE2

 Before: B12782236 After: B12751444 \*\*251,550\*\*

Routine Name: IBCNRHLT

 Before: B14102069 After: B13273530 \*\*251,435,550\*\*

Routine Name: IBCNRHLU

 Before: B7442206 After: B8116443 \*\*251,550\*\*

Routine Name: IBCNRMFE

 Before: B8335815 After: B7262621 \*\*251,276,550\*\*

Routine Name: IBCNRMFK

 Before: B5880062 After: B5869085 \*\*251,550\*\*

Routine Name: IBCNRP

 Before: B23991821 After: B23991702 \*\*251,516,550\*\*

Routine Name: IBCNRPM2

 Before: B20488193 After: B20472874 \*\*251,276,550\*\*

Routine Name: IBCNRRP3

 Before: B58110020 After: B58130731 \*\*251,276,516,550\*\*

Routine Name: IBCNRU1

 Before: B36756107 After: B30407184 \*\*251,276,435,550\*\*

Routine Name: IBCNRZCM

 Before: B3893703 After: B3870682 \*\*251,550\*\*

Routine Name: IBCNRZP0

 Before: B925392 After: Delete

Routine Name: IBCNRZPL

 Before: B7494348 After: B6548655 \*\*251,550\*\*

Routine Name: IBCNRZPP

 Before: n/a After: B13594389 \*\*550\*\*

Routine Name: IBCNRZRX

 Before: B13620171 After: Delete

Routine Name: IBNCPBB1

 Before: B4732084 After: B4476268 \*\*384,550\*\*

Routine Name: IBNCPDP

 Before: B5636694 After: B14785713 \*\*223,276,363,383,384,411,435,

 452,550\*\*

Routine Name: IBNCPDP1

 Before:B164054794 After:B179115393 \*\*223,276,339,363,383,405,384,

 411,434,437,435,455,452,473,

 494,534,550\*\*

Routine Name: IBNCPDP2

 Before: B84172572 After: B82759628 \*\*223,276,342,347,363,383,405,

 384,411,435,452,526,550\*\*

Routine Name: IBNCPDPU

 Before:B125879968 After:B126640808 \*\*223,276,347,383,405,384,437,

 435,452,511,534,550\*\*

Routine Name: IBNCPDR

 Before: B7723137 After: B9280847 \*\*384,550\*\*

Routine Name: IBNCPDR1

 Before: B4262134 After: B3213258 \*\*384,550\*\*

Routine Name: IBNCPDR2

 Before: B8736079 After: B9323055 \*\*384,550\*\*

Routine Name: IBNCPDR4

 Before: B32682440 After: B31809366 \*\*384,550\*\*

Routine Name: IBNCPDRA

 Before: n/a After: B35956392 \*\*550\*\*

Routine Name: IBNCPDRB

 Before: n/a After: B19609001 \*\*550\*\*

Routine Name: IBNCPEV

 Before:B102192248 After: B98081615 \*\*342,363,383,384,411,435,452,

 521,516,550\*\*

Routine Name: IBNCPEV1

 Before: B67774383 After: B78796257 \*\*342,339,363,411,435,452,516,550\*\*

Routine Name: IBNCPLOG

 Before: B83304395 After: B86545576 \*\*342,339,363,383,411,435,452,

 534,550\*\*

Routine Name: IBNCPUT1

 Before: B20040520 After: B21678012 \*\*342,363,384,550\*\*

Routine Name: IBTRKR3

 Before: B54376358 After: B54454971 \*\*13,43,121,160,247,275,260,

 309,336,312,339,347,405,384,

 550\*\*

Routine Name: IBY550PO

 Before: n/a After: B5495891 \*\*550\*\*

Routine list of preceding patches: 416, 516, 526, 534

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

# Backout and Rollback Procedures

## Overview of Backout and Rollback Procedures

The rollback plan for VistA applications is complex and not able to be a “one size fits all.” The general strategy for VistA rollback is to repair the code with a follow-up patch. The development team recommends that sites log a ticket if it is a nationally released patch; otherwise, the site should contact the Enterprise Program Management Office (EPMO) directly for specific solutions to their unique problems.

## Backout Procedure

During the VistA Installation Procedure of the KIDS build, the installer can back up the modified routines using the ‘Backup a Transport Global’ action. The installer can restore the routines using the MailMan message that were saved prior to installing the patch. The backout procedure for global, data dictionary and other VistA components is more complex and will require issuance of a follow-up patch to ensure all components are properly removed. All software components (routines and other items) must be restored to their previous state at the same time and in conjunction with restoration of the data. This backout may need to include a database cleanup process.

Please contact the EPMO for assistance if the installed patch that needs to be backed out contains anything at all besides routines before trying to backout the patch. If the installed patch that needs to be backed out includes a pre or post install routine please contact the EPMO before attempting the backout.

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 #.

    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.

## Rollback Procedure

The rollback procedure for VistA patches is complicated and may require a follow-up patch to fully roll back to the pre-patch state. This is due to the possibility of Data Dictionary updates, Data updates, cross references, and transmissions from VistA to offsite data stores.

Please contact the product development team for assistance if needed.

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

# Enhancements

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

## System Feature: ROI Expiration Date

The Patient Release of Information [IBCNR RELEASE OF INFORMATION] action allows the user to enter any date for the expiration date. However, the expiration date cannot be earlier than the effective date. There is also a new ROI Expiration Report [IBCNR ROI EXPIRATION REPORT] available to users and is sorted by expiration date in reverse chronological order.

## System Feature: TRICARE Copay

The system does not create a TRICARE copay for a prescription if a TRICARE copay already exists.

## System Feature: Display VA Plan ID

Several options display the VA Plan ID instead of the Pharmacy Plan: Group Plan Worksheet Report [IBCNR GROUP PLAN WORKSHEET], Match Multiple Group Plans [IBCNR GROUP PLAN MATCH], and Match Group Plan to a Pharmacy [IBCNR PLAN MATCH].

## System Feature: Billing Determination

IB Billing Determination uses the ePharmacy Billable fields to assess billable status and the Sensitive Diagnosis Drug field to assess sensitive diagnosis instead of using the DEA, Special HDLG field.

## System Feature: Date of Service

The back billing processes uses the same date of service algorithm used in outpatient pharmacy.

## System Feature: Billing Event Log

The IB Billing Event Log contains new drug file fields in the finish event for billing events that do not generate a claim because of non-billable determination.