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

Health Plan Identifier (HPID) Implementation

Integrated Billing (IB)
Release Notes/ Installation Guide/ Rollback Plan

IB*2*519

November 2014
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1 Introduction

This Integrated Billing (IB) patch introduces changes to VistA's Insurance Company file (#36) and electronic Insurance Verification (eIV) 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*519

This patch (IB*2*519) is being released in the Kernel Installation and Distribution System (KIDS) distribution.

1.1 Documentation and Distribution

Updated documentation describing the new functionality introduced by this patch is available using the File Transfer Protocol (FTP).

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

Hines        ftp.fo-hines.med.va.gov

Salt Lake City ftp.fo-slc.med.va.gov

The documentation will be in the form of Adobe Acrobat files.

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

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<td>IB User Manual</td>
<td>ib_2_0_um_r1114.pdf</td>
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(This page included for two-sided copying.)
2 Patch Description and Installation Instructions

2.1 Patch Description

Run Date: DEC 16, 2014
Designation: IB*2*519
Package: INTEGRATED BILLING
Priority: MANDATORY
Version: 2
Status: RELEASED

Associated patches: (v)IB*2*211 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*400 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*457 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*488 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*494 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*497 <<= must be installed BEFORE \`IB*2*519'
(v)IB*2*506 <<= must be installed BEFORE \`IB*2*519'

Subject: IB/NATIONAL INSURANCE FILE (NIF) INTERFACE, eIV AND eBILLING FIXES
Category: ROUTINE
          ENHANCEMENT
          DATA DICTIONARY
          OTHER

Description:
==========

Please install this patch at your earliest convenience. When you install this patch, an extract of insurance company data will be transmitted to the eBusiness Solutions group of the Chief Business Office (CBO). Once received, this extract will be combined with extracts from other VAMC sites -- a time-consuming process. In order to allow the eBusiness team adequate time to consolidate this data, it would be appreciated if this patch could be installed closer to the beginning of the compliance window rather than toward the end of it.

After installing this patch, you must enable the logical link for the HL7 interface to the NIF. Instructions for doing this are included in the post-install instructions below.

The Health Plan Identifier (HPID) project implements a new national standard of having a single identifier to use on electronic transmissions pertaining to health care. All entities that are financially responsible for care are assigned a HPID or Other Entity Identifier (OEID), used for entities that aren't traditional health plans. This new standard increases interoperability by replacing clearinghouse-specific identifiers for health plans.

This patch updates the Integrated Billing (IB) package to enable it to store these new HPIDs and OEIDs, and to associate the entries in the local INSURANCE COMPANY file (#36) with a new National Insurance File (NIF). The
NIF is housed at the Financial Services Center (FSC), which will centrally manage distribution of HPID/OEID data.

This patch introduces a new Health Level Seven (HL7) interface for exchanging insurance information with the NIF. Included with this new interface is a logging function which generates transaction records, facilitating troubleshooting. These records are periodically purged by the software itself.

When installed, this patch will transmit a flat-file extract to the FSC in order to assist in the setup of the NIF.

Additional patch items:

1) If a user selects the option PROCESS INSURANCE BUFFER[IBCN INSURANCE BUFFER PROCESS] and they have neither of the security keys (IB INSURANCE COMPANY EDIT and IB GROUP PLAN EDIT), then the only insurance buffer records that are displayed to them would be entries for Electronic Insurance Verification (eIV) confirmed active policies ("+" entries) when the patient in that record has an active policy on file in VistA. This patch increases the number of potential active policies that users may process.

2) Corrected a problem that occurs on some insurance buffer entries. With the menu option PROCESS INSURANCE BUFFER [IBCN INSURANCE BUFFER PROCESS], a user can select to Expand Entry (action 'EE'). Some records, when expanded, are showing that the eIV response is based on an unknown Service Date and unknown Service Type. This is being corrected to report the correct service date and type. This data is only available to those buffer entries that were processed by eIV.

3) Corrected a problem that occurs with the option PROCESS INSURANCE BUFFER [IBCN INSURANCE BUFFER PROCESS]. If a user selects the Expand Entry action ('EE') followed by the Response Report action ('RR'), when the user exits the eIV Response Report the display does not show the detail of the record and page 0 of 0 is displayed. The software has been updated so that the display is correct when a user exits the eIV Response Report.

4) Corrected a problem where the Total Charges dollar amount (BOX24F) and the Days/Unit (BOX24G) were printing one character too far over to the right on the CMS-1500 form and causing BOX24G’s data to run into BOX24H. To support this, the IB FORM SKELETON DEFINITION (#364.3) entry for BOX24F (record 1487) had its Length field (#.09) changed from 9 to 8.

5) Corrected a problem where the Total Charges dollar amount was dropping the last number in the cents field on the TPJI->BC (Bill Charges) display screen.

Patch Components
================

Files & Fields Associated:

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<th>File Name (Number)</th>
<th>Field Name (Number)</th>
<th>New/Mod/Del</th>
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<tbody>
<tr>
<td>INSURANCE COMPANY (#36)</td>
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</table>
HPID/OEID (#8.01) NEW
CHP/SHP (#8.02) NEW
PARENT CHP (HPID) (#8.03) NEW
NIF ID (#8.04) NEW

IB FORM SKELETON DEFINITION (#364.6) MOD ENTRY
Screen: I Y=1487

HPID/OEID RESPONSE (#367)
MESSAGE CONTROL ID (#.01) NEW
TRANSMISSION QUEUE (#.02) NEW
RESPONSE TYPE (#.03) NEW
INSURANCE COMPANY (#.04) NEW
PROCESSING STATUS (#.05) NEW
STATUS DATE/TIME (#.06) NEW
VISTA UNIQUE ID (#.07) NEW
PARENT CHP (HPID) (#.08) NEW
CHP/SHP (#.09) NEW
DATE OF FUTURE PURGE (#.1) NEW

HPID/OEID RESPONSE (#367) Subfile IDENTIFIERS (#1)
INSURANCE COMPANY ID TYPE (#.01) NEW
ID (#.02) NEW
SECONDARY ID QUALIFIER (#.03) NEW

HPID/OEID TRANSMISSION QUEUE (#367.1)
TRANSACTION NUMBER (#.01) NEW
INSURANCE COMPANY (#.02) NEW
DATE/TIME CREATED (#.03) NEW
TRANSMISSION STATUS (#.04) NEW
STATUS DATE/TIME (#.05) NEW
RESPONSE (#.07) NEW
STREET ADDRESS [LINE 1] (#2.01) NEW
STREET ADDRESS [LINE 2] (#2.02) NEW
CITY (#2.03) NEW
STATE (#2.04) NEW
ZIP CODE (#2.05) NEW
BILLING COMPANY NAME (#2.06) NEW
TYPE OF COVERAGE (#2.07) NEW
PHONE NUMBER (#2.08) NEW

HPID/OEID TRANSMISSION QUEUE (#367.1) Subfile IDENTIFIERS (#1)
INSURANCE COMPANY ID TYPE (#.01) NEW
ID (#.02) NEW
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INSURANCE COMPANY ID TYPE (#367.11)
NAME (#.01) NEW
DESCRIPTION (#1) NEW

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Remote Procedure

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Additional Information:

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New Service Requests (NSRs):

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2.2 Pre/Post Installation Overview

This patch should be installed during a period of low system activity with IB users off the system. After this patch is installed, a task will be scheduled to send an extract of the INSURANCE COMPANY file (#36) to the FSC to aid in setting up the NIF. By default, the task will begin immediately after the installation is complete, but this can be delayed until a later time if necessary. Since this patch should be installed during a period of low system activity, the chance of this extract impacting users' sessions is low. This should be taken into account when deciding on the timing of this extract.

Don’t forget to enable the logical link for the HL7 interface (step 3 of the post install instructions) immediately after installing the patch.

2.3 Installation Instructions

Choose the PackMan message containing this patch.

2. Choose the INSTALL/CHECK MESSAGE PackMan option.

3. From the Kernel Installation and Distribution System (KIDS) 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*519):
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, data dictionaries, templates, etc.). Note: Because of a typo in the previous patch, you may see the message "*** WARNING, you are missing one or more Patches ***" when comparing IBCNEHL4. You may safely ignore this warning, and the typo that caused KIDS to display this message has been fixed.

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. Enter IB*2.0*519.

5. When prompted for 'Enter the Coordinator for Mail Group 'NIFQRY'":", respond with the name of the Mail Group Coordinator for the Integrated Billing package or a facility Mail Group Coordinator.

6. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond NO.

7. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//', respond NO.

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

9. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

Post-Installation Instructions
-------------------------------
1. You will be prompted 'Requested Start Time: NOW//'  
   At this prompt, you may enter a time to run the data extract after installation, with a default of immediately. If you wish to delay the extract until a later time, enter that time at this prompt. This prompt will be skipped if the install is queued. In that case, the extract will be executed at the time the install is performed.

2. If you chose to delay the extract, then you will see 'Task #' followed by the number of your scheduled task. You will need this number if you want to confirm that your task has been scheduled to run. To confirm this, from the Taskman Management menu, select List Tasks, then Your future tasks. Check the output from that option for an entry matching your task number, and verify that it is scheduled for the appropriate time.

3. Enable the logical link for the HL7 interface to the NIF.
   a. From the HL7 Main Menu [HL MAIN MENU], select Filer and Link Management Options [HL MENU FILER LINK MGT].
   b. Select Start/Stop Links [HL START].
   c. When prompted to "Select HL LOGICAL LINK NODE:" enter "IB NIF TCP" and press ENTER.
d. The system will display "This LLP has been enabled!" to confirm that it has successfully started.

Routine Information:
====================
The second line of each of these routines now looks like:
V ;;2.0;INTEGRATED BILLING;**[Patch List]**;21-MAR-94;Build 56

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

Routine Name: IBAMTC
   Before: B26047773   After: B26484499  **34,52,70,93,100,118,115,132, 150,153,137,176,215,275,321, 312,457,519**

Routine Name: IBCEU3
   Before: B105297417  After: B106673839  **51,137,155,323,348,371,400, 432,488,519**

Routine Name: IBCNBLE
   Before: B105786784  After: B108261556  **82,231,184,251,371,416,435, 452,497,519**

Routine Name: IBCNBLL
   Before: B138729075  After: B139954762  **82,149,153,183,184,271,345, 416,438,435,506,519**

Routine Name: IBCNBMN
   Before: B7906645     After: B8591639  **82,211,519**

Routine Name: IBCNEHL4
   Before: B174792299   After: B176214857  **300,416,438,497,506,519**

Routine Name: IBCNERPE
   Before: B65900140    After: B70614398  **271,300,416,438,497,506,519**

Routine Name: IBCNHHLI
   Before: **n/a**      After: B10645426  **519**

Routine Name: IBCNHHL0
   Before: **n/a**      After: B10205311  **519**

Routine Name: IBCNHSLRV
   Before: **n/a**      After: B2517223   **519**

Routine Name: IBCNHUT1
   Before: **n/a**      After: B19672959  **519**

Routine Name: IBCNHUT2
   Before: **n/a**      After: B47011114  **519**

Routine Name: IBCNFS01
   Before: B57572758    After: B59075221  **52,137,191,184,232,320,349, 371,399,416,432,494,519**

Routine Name: IBCNFS1

Routine Name: IBCNSJ3
   Before: B19317542    After: B20256950  **28,497,506,519**

Routine Name: IBY519PO
   Before: **n/a**      After: B40291795  **519**

Routine list of preceding patches: 211, 457, 488, 494, 506
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3 Backout and Rollback Procedures

3.1 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-on patch. The development team recommends 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.

3.2 Backout Procedure
During the VistA Installation Procedure of the KIDS build, the installer hopefully backed up the modified routines by the use of 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-on 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 product development team 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 product development team 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.

3.3 Rollback Procedure
The rollback procedure for VistA patches is complicated and may require a follow-on 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.
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4 Enhancements

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

4.1 System Feature: HL7 Messages Inbound

4.1.1 HL7 Messages Inbound – Maintain the Insurance Company Name in the Insurance Company file (#36)
The insurance company name in the Insurance Company File (#36) is NOT updated using the data from the NIF.

4.1.2 HL7 Messages Inbound – The HPID/OEID Field to Be Viewable Only in the Insurance Company file (#36)
The HPID/OEID field is viewable but non-editable in VistA in the Insurance Company file (#36). Any changes to HPID/OEID are made in the NIF so that they may be distributed to all VAMCs.

4.1.3 HL7 Messages Inbound – Store the HPID in the Insurance Company file (#36)
The system stores the HPID in the Insurance Company file (#36). The HPID is a 10-digit, all-numeric identifier which follows the ISO (International Organization for Standardization) Standard 7812 format with a Luhn check-digit as the tenth digit. The start digit of the HPID signals whether the identifier has been provided to a health plan or to an “other entity”. If the start digit is a seven (7) then it identifies a health plan, a six (6) indicates an “other entity”.

4.1.4 HL7 Messages Inbound – Store the Other Entity Identifier (OEID) in the Insurance Company file (#36)
The system stores the Other Entity Identifier (OEID) in the Insurance Company file (#36). The OEID serves as the identifier for entities that are not health plans, healthcare providers, or individuals (persons) who are not eligible for the HPID or National Provider Identifier (NPI), yet they need to be identified in standard transactions and for other lawful purposes. The Other Entity Identifier begins with a six (6).

4.1.5 HL7 Messages Inbound – Distinguish Between HPID and OEID
The system maintains a field to distinguish between an HPID identifier and an OEID identifier. **Note:** HPID is used for patient specific health plan product or benefit plan; OEID is used for organizations that perform the health plan function or other entity that performs certain administrative or contracting functions on behalf of the health plan.

4.1.6 HL7 Messages Inbound – Ability to Define the HPID as Either a Controlling Health Plan (CHP) or Subhealth Plan (SHP)
The system defines the VistA Insurance Company file (#36) entry as either the Controlling Health Plan (CHP) or Subhealth Plan (SHP).

**Note:** CHP is a health plan that controls its own business activities, actions, or policies. Can have 0 to many subhealth plans associated to it. SHP is a health plan whose business activities, actions, or policies are directed by a CHP.
4.1.7 HL7 Messages Inbound – Associate the Legacy Identifiers to the New HPID/ OEID
The system associates the new HPID/OEID data element with the legacy identifiers representing a given health plan so there will be a linkage between old and new.

Note: A HPID/OEID may be linked to more than one legacy ID and there may be multiple HPID/OEID entries linked to a single legacy ID.

4.1.8 HL7 Messages Inbound – Retain Patient Policy Functionality with Respect to the Patient File (#2)
The system retains the functionality to associate patients to their policies, and maintain the necessary information on electronic transmissions so that FSC retains the ability to route files to the correct payer system.

4.1.9 HL7 Messages Inbound – Maintain the Existing EDI Professional and EDI Institutional Legacy 20-Byte Fields
The system provides the ability for VistA to maintain the existing (legacy) 20 byte data field, for the EDI Professional and the EDI Institutional.

Note: Fields are as follows: File #36, field #3.02 EDI ID NUMBER-PROF and File #36 field #3.04 EDI ID NUMBER-INST.

4.1.10 HL7 Messages Inbound – Continue to Store the Legacy Electronic Payer ID
The system provides the ability for VistA to continue to store the legacy electronic Payer ID.

4.1.11 HL7 Messages Inbound – Load the HPID/OEID into the local Insurance Company File (#36)
The system loads the HPID into the local Insurance Company file (#36) based on the INSID from the original seeding of the NIF from VistA.

Note: INSID is a unique insurance company ID from VistA. It is a combination of the site’s number and the internal record number in file #36.

4.1.12 HL7 Messages Inbound – Receive and Process a HPID/OEID from FSC
The system provides the ability for VistA to receive and process HPID/OEID into file #36 upon receipt of an update from FSC based on changes to the NIF. An INSID consisting of a site ID and IEN is used so that updates are only stored at sites with systems already containing a given payer.

4.1.13 HL7 Messages Inbound – Modify the Insurance Company View Screen to Include the HPID/OEID
The Insurance Company View Screen includes the HPID/OEID. This field is view only.

4.2 System Feature: HL7 Messages Outbound

4.2.1 HL7 Messages Outbound - Allow Messages to be Exchanged between VistA and the NIF
The system provides the ability for VistA to use an interface to send and receive messages to/from the NIF, regardless of who initiates the message.
Note: VistA receives and stores a NIFID (National Insurance File ID).

4.2.2 HL7 Messages Outbound - Send Updates to the NIF for New Group/Plans Entered in VistA

The system provides the ability for VistA to use an interface to send a message containing insurance company information to the NIF, when a new Group/Plan is entered into VistA, and it is a new Insurance Company.

Note: VistA receives and stores a NIFID.

4.2.3 HL7 Messages Outbound - Send Updates to the NIF for Insurance Companies Modified in VistA

The system provides the ability for VistA to use an interface to send a message containing insurance company information to the NIF, when a VistA/NIF exchanged field associated with an insurance company is modified in VistA.

4.3 System Feature: Data Extract

4.3.1 Data Extract - Create Data Extract Files from Each VAMC to FSC for Initial Seeding of NIF

Data extracts are created from each VAMC’s VistA system using data from the Insurance Company (#36) file and sent to the FSC for initial seeding of the NIF. VistA only sends active insurance companies.