VistA Financial Annual Enhancements #1 eII

**RELEASE NOTES**

IB\*2\*457



June 2012

Department of Veterans Affairs

VISTAHealth
Systems Design & Development

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# Introduction

The purpose of this patch is to automate the Extract file transfer created by the HMS data extractor at the VAMCs, sending the data to the HMS Inc. server via the AITC DMI Queue.

The data sent will be used to identify patients' current, active insurance.

There is one extract file for each of four different insurance services. Each VAMC may contract individually with HMS Inc. to receive up to four different insurance services:

HMS\_NOINSUR - pulls patient information when there is no insurance on file

HMS\_ENHNOIN - pulls patient information when the records reflect Medicare but no other commercial insurance.

HMS\_NORXINS - pulls patient information when there is no "Prescription Only" insurance on file.

HMS\_NONVERINS - pulls patient information for re-verification purposes.

A site may only run the extracts identified in the current contract and must disable any extract in the event it is not included in a subsequent contract renewal. The CPAC IV Manager is the COTR for each contract and is expected to communicate any changes in contract status to the IRM's.

HMS Inc., after processing the extract files, sends the result file back through AITC DMI to the VAMC site so it can be uploaded to the Insurance Buffer file by the HMS Data Extractor. eII software alleviates the administrative burden to the IRM and HMS staff that manually transfer and collect data files from SharePoint, providing a more efficient and secure insurance identification process.

HMS/VEHM software must already be installed at the site for the extract process to work. Pre-installation instructions will describe how to check if the HMS software is on the system.

|  |  |
| --- | --- |
| **APPLICATION/VERSION** | **PATCH** |
| Integrated Billing | IB\*2\*312 |
| Integrated Billing  | IB\*2\*457 |
|  |  |

This patch is dependent on the IB\*2\*312 patch. Patch IB\*2\*312 must be installed prior to patch IB\*2\*457.

The Electronic Insurance Identification (eII) software automates the existing manual eII process:

1. The HMS extracts from VistA will be routed automatically to a central server at AITC as MailMan messages, with no manual intervention from IRM or HMS. Each file is sent as one or more MailMan messages.

1. AITC will route the HMS results to the VAMC that initiated the extract, as MailMan messages.

1. Extract the returning HMS results data from the MailMan messages, and place the file in the designated VMS directory.

1. Send the IRM a notification when the results are in the directory. The IRM is able to upload the results to the VistA insurance buffer file.

1. HMS data is converted into an XML file format. HMS data has two additional fields: Patient Relationship to Insured ID and Patient ID. These fields are included in the XML file.

1. The existing HMS extract file will continue to be produced as scheduled.

1. Automated notification messages will be sent to the IBCNF EII IRM mail Group at the VAMC site if an HMS extract file is not generated by the HMS data extractor software at the site when expected, as defined in the IB SITE PARAMETERS file.

1. Automated acknowledgement messages are sent from AITC to the VAMCs, acknowledging that the extract file message(s) are received by AITC. If the confirmation message(s) are not received within the expected time (usually 24 hours) as defined in the IB configuration parameter, the IBCNF EII IRM mail group is notified. For each message that no confirmation message is received, a new extract message will be send to AITC.

1. The eII Edit Configuration [IBCNF EDIT CONFIGURATION] option is used to enable/disable file transfer and/or set other parameters for eII software.

# Patch Description and Installation Instructions

## Patch Description

VistA Patch Display

**=============================================================================**

Run Date: JUN 04, 2012 Designation: IB\*2\*457

Package : INTEGRATED BILLING Priority : MANDATORY

Version : 2 Status : COMPLETE/NOT RELEASED

**=============================================================================**

Associated patches: (v)IB\*2\*312 <<= must be installed BEFORE `IB\*2\*457'

Subject: Electronic Insurance Identification

Category: ROUTINE

 ENHANCEMENT

 INPUT TEMPLATE

 DATA DICTIONARY

 OTHER

Description:

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1. The eII Edit Configuration [IBCNF EDIT CONFIGURATION] option is used to enable/disable file transfer and/or set other parameters for eII software.

Patch Components

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N/A

Files & Fields Associated:

File Name (Number) Field Name (Number) New/Modified/Deleted

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IB SITE PARAMETERS (#350.9) Modified

 HMS DIRECTORY (#13.01) New

 EII ACTIVE (#13.02) New

 RESULT FILE NAME (#13.03) New

 DAY OF MONTH RESULT FILE DUE (#13.04) New

 DAYS BEFORE LATE MESSAGE SENT(#13.05) New

 MAX EXT FILE QUE CONFIRM TIME(#13.06) New

 MAX NUM OF RECORDS PER MESSAGE(#13.07) New

 EXTRACT FILES sub-file (#350.9006) subfile New

 EXTRACT FILE TYPE (#.01) New

 EXTRACT FILE ACTIVE (#.02) New

 FILE NAME (#.03) New

 AITC DMI QUEUE EMAIL ADDRESS(#.04) New

 DAY OF MONTH EXTRACT FILE DUE (#.05) New

 DAYS BEFORE LATE MESSAGE SENT (#.06) New

HMS EXTRACT FILE STATUS FILE(#355.35) New

 EXTRACT FILE TYPE(#.01) New

 PROCESS DATE/TIME(#.02) New

 MESSAGES(#355.3503) subfile New

 MESSAGE\_ID(#.01) New

 SEND DATE/TIME(#.02) New

 AUSTIN ID(#.03) New

 AITC CONFIRMATION NUMBER(#.04) New

 ACTIVITY LOG(#355.3505) New

 PROCESS DATE/TIME(#.01) New

 MESSAGES(#355.35051) New

 MESSAGE ID(#.01) New

 SEND DATE/TIME(#.02) New

 AUSTIN ID(#.03) New

 AITC CONFIRMATION NUMBER(#.04) New

HMS RESULT FILE STATUS FILE(#355.351) New

 FILE NAME(#.01) New

 CREATION DATE/TIME(#.02) New

 MESSAGES(#355.35103) subfile New

 MESSAGE\_ID(#.01) New

 RECEIVED DATE/TIME(#.02) New

 ACTIVITY LOG(#355.3511)subfile New

 CREATION DATE/TIME(#.01) New

 MESSAGES(#355.35111) New

 MESSAGE ID(#.01) New

 RECEIVED DATE/TIME(#.02) New

Forms Associated:

Form Name File # New/Modified/Deleted

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N/A

Mail Groups Associated:

Mail Group Name New/Modified/Deleted

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IBN New

IBK New

IBX New

IBH New

IBCNF EII IRM New

IBCNF EII XML READY New

Options Associated:

Option Name Type New/Modified/Deleted

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IB SITE MGR MENU menu Modified

IBCNF EDIT CONFIGURATION run routine New

IBCNF EII GET SERVER server New

Protocols Associated:

Protocol Name New/Modified/Deleted

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N/A

Security Keys Associated:

Security Key Name New/Modified/Deleted

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IBCNF EDIT New

Templates Associated:

Template Name Type File Name (Number) New/Modified/Deleted

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IBCNF EDIT INPUT IB SITE PARAMETERS(#350.9) New

CONFIGURATION

Additional Information: N/A

New Service Requests (NSRs)

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Electronic Insurance Identification (HMS Extracts) (20080502)

Patient Safety Issues (PSIs)

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N/A

Remedy Ticket(s) & Overview

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N/A

Problem:

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N/A

Resolution:

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N/A

Test Sites:

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REDACTED

Documentation Retrieval Instructions

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Updated documentation describing the new functionality introduced by this patch is available.

The preferred method is to FTP the files from REDACTED

This transmits the files from the first available FTP server. Sites may also select to retrieve software directly from a specific server as follows:

 Albany REDACTED REDACTED

 Hines REDACTED 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 FTP Mode

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eII User Manual IB\_2\_P457\_UM.PDF (binary)

Release Notes IB\_2\_P457\_RN.PDF (binary)

Technical Manual (IB\*2\*457) IB\_2\_P457\_TM.PDF (binary)

## Installation Instructions

Patch Installation:

Pre/Post Installation Overview

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Before installing this software:

1. Be sure IB\*2.0\*312 patch is installed at your VAMC.
2. Check if the HMS Data Extractor Software is installed at your VAMC by doing a FileMan **Inquire** into the INSTALL file. If your site has HMS software, there will be an entry for VEHM.
3. Be sure the IB MT NIGHT COMP option is already scheduled to run at your site.

Identify the mail group coordinator (most likely the person who is installing the patch) to be assigned to IBN, IBK,IBX, IBH, IBCNF EII IRM and IBCNF EII XML READY mail groups when installing the patch.

As part of post-routine's patch installation, the following configuration will be set up. Verify that the fields denoted by "\*" match the HMS Data Extractor parameters (if your site is running the HMS Data Extractor software). Extract/Result File names contain station ID (<id>) of the VAMC site where the eII software is installed.

\*HMS DIRECTORY: USER$:[HMS] \*EII ACTIVE: NO

\*RESULT FILE NAME:VA<id>.TXT \*DAY OF MONTH RESULT FILE DUE: 31

\*DAYS BEFORE LATE MESSAGE SENT: 2 MAX EXT FILE QUE CONFIRM TIME: 24

 MAX NUM OF RECORDS PER MESSAGE: 100

 EXTRACT FILE TYPE: NOINSUR \*EXTRACT FILE ACTIVE: YES

\*FILE NAME: VEHMN<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

\*DAY OF MONTH EXTRACT FILE DUE:1 \*DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: ENHNOIN \*EXTRACT FILE ACTIVE: YES

\*FILE NAME:VEHMH<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

\*DAY OF MONTH EXTRACT FILE DUE:1 \*DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: NORXINS \*EXTRACT FILE ACTIVE: YES

\*FILE NAME: VEHMX<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

\*DAY OF MONTH EXTRACT FILE DUE:1 \*DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: NONVERINS \*EXTRACT FILE ACTIVE: YES

\*FILE NAME: VEHMK<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

\*DAY OF MONTH EXTRACT FILE DUE:0 \*DAYS BEFORE LATE MESSAGE SENT: 2

Based on the HMS Data Extractor parameters, the above parameters need to be modified.

Note: For each of the extracts running at the site it is recommended that you set the expected day to 22 (twenty-two) and the days before late message is sent to 0 (zero); **th**e exception to this is the NONVERINS extract, which is run as needed.

In addition verify that the REDACTED domain is defined in DOMAIN file. The patch installation will then create the following entries in the DOMAIN file:

NAME: REDACTED FLAGS: S

 RELAY DOMAIN: REDACTED DISABLE TURN COMMAND: YES

NAME: REDACTED FLAGS: S

 RELAY DOMAIN: REDACTED DISABLE TURN COMMAND: YES

NAME: REDACTED FLAGS: S

 RELAY DOMAIN: REDACTED DISABLE TURN COMMAND: YES

NAME: REDACTED FLAGS: S

 RELAY DOMAIN: REDACTED DISABLE TURN COMMAND: YES

After the eII software is installed and activated, the communication between the AITC DMI Queue and your VAMC should already be established and AITC should be able to transfer Extract and Result files between VAMC and HMS Inc. server too.

Installation Instructions

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This patch may be installed with users on the system. But, be sure the IB MT NIGHT COMP is not running at the time of software install. This patch should take less than 5 minutes to install.

Pre-Installation Instructions

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1. Choose the PackMan message containing this patch.

1. Choose the INSTALL/CHECK MESSAGE PackMan option.

1. 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 #IB\*2.0\*457:

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 DD's 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, DD's, 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.

1. From the Installation Menu, select the Install Package(s) option and choose the patch IB\*2.0\*457 to install.

1. When Prompted to
2. Enter the Coordinator for Mail Group 'IBN':
3. Enter the Coordinator for Mail Group 'IBH':
4. Enter the Coordinator for Mail Group 'IBX':
5. Enter the Coordinator for Mail Group 'IBK':
6. Enter the Coordinator for Mail Group 'IBCNF EII IRM':
7. Enter the Coordinator for Mail Group 'IBCNF EII XML READY':

 Enter the coordinator name for each of the above mail groups.

1. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//' Accept the default to rebuild the menu.

1. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//' Accept the default to not inhibit the logons.

1. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' Accept the default of NO.

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

Post-Installation Instructions

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IF THERE IS NO HMS DATA EXTRACTOR SOFTWARE INSTALLED, STOP HERE. Otherwise continue as follow:

1. Assign the responsible personnel to the following mail groups:

1. IBCNF EII XML READY - Assign Business Office Users who needs to get HMS XML files.
2. IBCNF EII IRM - IRM should be assigned to this mail group so the he/she can be notified of any extracted files not found or result files not received within the expected due day.

1. Run the Core --> IB --> IRM --> eII Edit Configuration to match their values with HMS Data Extractor parameters.

Depending on how the HMS Data Extractor parameters are set up, you may accept or change the default values. Also, be sure to set the EII ACTIVE field to "YES". In the following list <id> postfix is the station id of the VAMC site where the eII software is installed.

Note: For each of the extracts running at the site, it is recommended that you set the expected day of month extract file due to 22 (twenty-two), and the days before late message is sent to 0 (zero). The exception to this is the NONVERINS extract which is run as needed.

 EXTRACT FILE TYPE: NOINSUR EXTRACT FILE ACTIVE: YES

 FILE NAME:VEHMN<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

 DAY OF MONTH EXTRACT FILE DUE: 1 DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: ENHNOIN EXTRACT FILE ACTIVE: YES

 FILE NAME:VEHMH<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

 DAY OF MONTH EXTRACT FILE DUE: 1 DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: NORXINS EXTRACT FILE ACTIVE: YES

 FILE NAME: VEHMX<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

 DAY OF MONTH EXTRACT FILE DUE: 1 DAYS BEFORE LATE MESSAGE SENT: 2

 EXTRACT FILE TYPE: NONVERINS EXTRACT FILE ACTIVE: YES

 FILE NAME:VEHMK<id>.TXT

 AITC DMI QUEUE EMAIL ADDRESS: XXX@REDACTED

 DAY OF MONTH EXTRACT FILE DUE: 0 DAYS BEFORE LATE MESSAGE SENT: 2

1. Be sure that the DOMAIN file entries are created correctly by viewing the XM\*DBA\*176 patch description. For the test accounts use the following instruction:

 \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

 \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\* TEST ACCOUNTS ONLY \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

 \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

To prevent inadvertent transmissions to the four new domains, verify that the 'REDACTED' domains FLAGS field are set to "C" in the test accounts.

 Example:

 Select OPTION: ENTER OR EDIT FILE ENTRIES

 INPUT TO WHAT FILE: DOMAIN//

 EDIT WHICH FIELD: ALL// FLAGS

 THEN EDIT FIELD:

 Select DOMAIN NAME: REDACTED

 FLAGS: S// C

 \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

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Routine Information:

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

;;2.0;INTEGRATED BILLING;\*\*[Patch List]\*\*;21-MAR-94;Build 30

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

Routine Name: IB20P457

 Before: n/a After: B18868248 \*\*457\*\*

Routine Name: IBAMTC

 Before: B25558065 After: B26047773 \*\*34,52,70,93,100,118,115,132,

 150,153,137,176,215,275,321,

 312,457\*\*

Routine Name: IBCNFCON

 Before: n/a After: B917921 \*\*457\*\*

Routine Name: IBCNFRD

 Before: n/a After: B53860378 \*\*457\*\*

Routine Name: IBCNFRD2

 Before: n/a After:B155001370 \*\*457\*\*

Routine Name: IBCNFSND

 Before: n/a After:B150963134 \*\*457\*\*

# Enhancements

The IB\*2\*457 patch automates the Extract file transfer created by HMS data extractor at the VAMCs to the HMS Inc server via AITC DMI Queue and retrieval of result file back from the HMS Inc. server through AITC DMI Queue so it can be uploaded to Insurance Buffer file by HMS Data Extractor software. This would alleviate the administrative burden to the IRM and HMS staff that manually transfer and collect data files from SharePoint providing a more efficient and secure insurance identification process.

The Electronic Insurance Identification (eII) software automates the existing manual eII process:

1. The HMS extracts from VistA will be routed automatically to a central server at AITC as MailMan messages, with no manual intervention from IRM or HMS. Each file is sent as one or more MailMan messages.

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1. The existing HMS extract file will continue to be produced as scheduled.

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1. The eII Edit Configuration [IBCNF EDIT CONFIGURATION] option is used to enable/disable file transfer and/or set other parameters for eII software.

## Issue Resolutions

There are no Remedy Tickets associated with this patch.

New Service Requests (NSRs) associated with this patch

* Electronic Insurance Identification (HMS Extracts) (20080502)