U.S. Department of Veterans Affairs

Office of Information and Technology
Product Development

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

eIV Provider Operating Rules

Integrated Billing (IB)

Release Notes/Installation Guide
IB*2*497

January 2014

Contents

(This page included for two-sided copying.)

1 Introduction

This Integrated Billing (IB) patch introduces substantial changes to VistA's electronic Insurance Verification (eIV) Eligibility Inquiry and Response Processing 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*497
```

This patch (IB*2*497) is being released in the Kernel Installation and Distribution System(KIDS) distribution.

1.1 Documentation Distribution

Updated documentation describing the new and modified 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 elect to retrieve software directly from a specific server as follows:

```
Albany           REDACTED      REDACTED
Hines            REDACTED      REDACTED
Salt Lake City   REDACTED      REDACTED
```

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

Title	File Name	FTP Mode
Release Notes/Installation Guide	ib_2_p497_rn.pdf	Binary
eIV User Guide	ib_2_p497_eIV_ug.pdf	Binary
EIV Technical Manual/Security Guide	ib_2_p497_eIV_tm.pdf	Binary
IB User Manual	ib_2_p497_um.pdf	Binary
IB Technical Manual	ib_2_p497_tm.pdf	Binary

(This page included for two-sided copying.)

2 Patch Description and Installation Instructions

2.1 Patch Description

```
VistA Patch Display                                             Page: 1
==========================================================================
Run Date: JAN 14, 2014                    Designation: IB*2*497  TEST v24
Package : INTEGRATED BILLING               Priority   : MANDATORY
Version : 2                                 Status     : UNDER DEVELOPMENT
==========================================================================


Associated patches: (v)IB*2*62     <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*141    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*263    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*359    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*444    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*458    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*467    <<= must be installed BEFORE `IB*2*497'
                    (v)IB*2*473    <<= must be installed BEFORE `IB*2*497'



Subject:  E-IV PROVIDER OPERATING RULES

Category:  DATA DICTIONARY
           ROUTINE
           ENHANCEMENT
           OTHER


Description:
==========================================================================
**************************************************************************
**************************************************************************
**************************************************************************

Please read this patch description in its entirety before installing.

The post installation routine of this patch contains significant data
conversions.  A purge of some of the eIV data files, IIV RESPONSE (#365)
and IIV TRANSMISSION QUEUE (#365.1), greatly reduces the conversion time.
When the purge was run at test sites prior to the install, the
installation of this patch took between 1-4 hours.  When the files were
not purged prior to the install, the installation did not complete in a
reasonable amount of time.

Some sites have not purged eIV data in a long time, if ever.  There is an
option, Purge eIV Transactions [IBCNE PURGE IIV DATA] option, built into
eIV to purge data.  It allows old data to be purged, but retains at least
the last 6 months.  Data older than 6 months in these files is not current
enough to be useful. There are instructions on how to run the purge later
in this patch description.  If the files have not been recently
purged, this purge may result in significant journaling activity that
could fill up journal disks.  System managers should be made aware so
that journal growth can be monitored and managed accordingly.
```

Unless your site routinely runs the purge, it is CRITICAL that the purge is executed prior to the install! The purge should NOT be run on the same night as the installation of this patch.

If for some reason the installer does not run the purge, the conversions will take significantly longer and potential for journaling and installation issues increase.

Finally, since the post installation takes quite a while depending on the site, it is IMPERATIVE that this patch is queued for installation. This is also explained in greater detail in the patch installation instructions later in this patch description.

```
**************************************************************************
**************************************************************************
**************************************************************************
```

This Integrated Billing (IB) patch introduces substantial changes to VistA's electronic Insurance Verification (eIV) Eligibility Inquiry and Response Processing in order to meet the Committee on Operating Rules for Information Exchange (CORE) Operating Rules.

Complete list of patch items:

1.   Allow VistA to accept all X12N/5010 codes and qualifiers without validation since they have already been validated by the Eligibility Communicator (EC) at the Financial Services Center (FSC) in Austin prior to transmission to the VA Medical Centers (VAMC).

2.   Allow Vista to accept, store and display additional policy/benefit information sent from payers which include Military Personal Information (X12N/5010 MPI), Provider Information (X12N/5010 PRV) and Health Care Diagnosis Code Information (X12N/5010 HI).

3.   Provide the ability for users to view the AAA Error Reporting Codes and corresponding textual description in the Response Report View of Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS] when an Error Reporting Code is received in response to an X12N/5010 Health Care Eligibility Benefits Inquiry (270).

4.   Transmit additional statistical information in the daily eIV registration message (HL7 MFN message) to the FSC.

5.   Transmit the NAME OF INSURED (#17) Field of the INSURANCE TYPE SUB-FILE (#2.312) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is a value in the NAME OF INSURED (#17) field.

6.   Allow VistA to receive, store and display the AAA additional Error Message Text on the Response Report View of the Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS] when received in an X12N/5010 Health Care Eligibility Benefits Response.

7.   A new option, Update Subscriber Info [IBCN UPDATE SUBSCRIBER INFO], required to be scheduled upon installation, which updates

subscriber fields in the INSURANCE TYPE SUB-FILE (#2.312), with the values stored in the PATIENT FILE (#2), when the PT. RELATIONSHIP - HIPAA (#4.03) field is self (18) and the field is blank and the insurance policy is Active. The option will then be added to the MCCR SYSTEM DEFINITION MENU [IB SYSTEM DEFINITION MENU] and require the IB SUPERVISOR key for future periodic use.

8.   Remove Data from 11 Default Service Types codes stored in the IB SITE PARAMETERS FILE (#350.9) and replace with the default SERVICE TYPE CODE 30 - Health Benefit Plan Coverage.

9.   Remove any site selected service type codes from the IB SITE PARAMETERS FILE (#350.9).

10.   Remove Medicare Insurance Intake option [IBCN MEDICARE INSURANCE INTAKE].

11.   A new Worklist/report, Medicare Potential COB Worklist [IBCNE POTENTIAL COB LIST], of those patients whom Medicare has identified in a 271 HL7 response message as having insurance subsequent to their Medicare insurance.

12.   Provide the ability for users to select an eligibility date for the Request Electronic Insurance Inquiry [IBCNE REQUEST INQUIRY] that is within the last 12 months or the end of the current month, defaulting to today's date if left blank.

13.   Creation of Data Dictionary fields to allow the storage of X12N/5010 Health Care Eligibility Benefits Response (271) data elements to better align with HIPAA data lengths. Since many of the requested fields part of Integration Control Registration Agreements (DBIA) with other VistA Packages, the use of the larger storage capabilities will be unavailable until the subscribing packages have sufficient time to be remediated.

14.   Reports and screen displays were modified to allow the display of increased field lengths above. Even though most of the increased field lengths will not be available until other packages using these fields are remediated, the reports and screen needed to be changed to allow for that eventuality.

Patch Components
==

The following is a list of field modifications included in this patch:

 Files & Fields Associated:

| File Name (#) | | New/Modified/ |
Sub-file Name (#)	Field Name (Number)	Deleted
PATIENT (#2)		Modified
INSURANCE TYPE sub-file (#2.312)		Modified
	*SUBSCRIBER ID (#1)	Modified
	INSURED'S STREET 1 (#3.06)	Modified
	INSURED'S STREET 2 (#3.07)	Modified

```
                          INSURED'S CITY (#3.08)            Modified
                          NAME OF INSURED (#7.01)           New
                          SUBSCRIBER ID (#7.02)             New
                          MILITARY INFO STATUS CODE (#12.01) New
                          MILITARY EMPLOYMENT STATUS (#12.02) New
                          MILITARY GOVT AFFILIATION CODE    New
                             (#12.03)
                          MILITARY PERSONNEL DESCRIPTION    New
                             (#12.04)
                          MILITARY SERVICE RANK CODE (#12.05) New
                          DATE TIME PERIOD FORMAT QUAL      New
                             (#12.06)
                          DATE TIME PERIOD (#12.07)         New
                          *NAME OF INSURED (#17)            Modified
   HEALTH CARE CODE INFORMATION sub-file (#2.31211)         New
   GROUP REFERENCE INFORMATION sub-file (#2.3129)           New
   ELIGIBILITY/BENEFIT sub-file (#2.322)                    Modified
                          ELIGIBILITY/BENEFIT INFO (#.02)   Modified
                          COVERAGE LEVEL (#.03)             Modified
                          INSURANCE TYPE (#.05)             Modified
                          TIME PERIOD QUALIFIER (#.07)      Modified
                          MONETARY AMOUNT (#.08)            Modified
                          QUANTITY QUALIFIER (#.1)          Modified
                          AUTHORIZATION/CERTIFICATION (#.12) Modified
                          IN PLAN (#.13)                    Modified
                          PROCEDURE CODING METHOD (#1.01)   Modified
                          ENTITY ID CODE (#3.01)            Modified
                          ENTITY TYPE (#3.02)               Modified
                          ENTITY ID QUALIFIER (#3.05)       Modified
                          ENTITY RELATIONSHIP CODE (#3.06)  New
                          LOCATION QUALIFIER (#4.08)        Modified
                          PROVIDER CODE (#5.01)             Modified
                          REFERENCE ID QUALIFIER (#5.03)    Modified
 CONTACT INFORMATION sub-file (#2.3226)                     Modified
                          *COMMUNICATION NUMBER (#.03)      Modified
                          COMMUNICATION QUALIFIER (#.04)    Modified
                          COMMUNICATION NUMBER (#1)         New
 HEALTHCARE SERVICES DELIVERY sub-file (#2.3227)            Modified
                          QUANTITY QUALIFIER (#.03)         Modified
                          UNITS OF MEASUREMENT (#.05)       Modified
                          TIME PERIOD QUALIFIER (#.07)      Modified
                          DELIVERY FREQUENCY (#.08)         Modified
                          DELIVERY PATTERN (#.09)           Modified
 SUBSCRIBER DATES sub-file (#2.3228)                        Modified
                          DATE QUALIFIER (#.03)             Modified
                          DATE FORMAT (#.04)                Modified
 SUBSCRIBER ADDITIONAL INFO sub-file (#2.3229)              Modified
                          PLACE OF SERVICE (#.02)           Modified
                          QUALIFIER (#.04)                  Modified
                          NATURE OF INJURY CODE (#.05)      New
                          NATURE OF INJURY CATEGORY (#.06)  New
                          NATURE OF INJURY TEXT (#.07)      New
 SUBSCRIBER REFERENCE ID sub-file (#2.32291)                Modified
                          REFERENCE ID QUALIFIER (#.03)     Modified
 SERVICE TYPES sub-file (#2.32292)                          Modified
                          SERVICE TYPES (#.01)              Modified
 GROUP PROVIDER INFO sub-file (#2.332)                      New
```

```
IB SITE PARAMETERS (#350.9)                                     Modified
                DEFAULT SERVICE TYPE CODE 2            Modified
                    (#60.02)
                DEFAULT SERVICE TYPE CODE 3            Modified
                    (#60.03)
                DEFAULT SERVICE TYPE CODE 4            Modified
                    (#60.04)
                DEFAULT SERVICE TYPE CODE 5            Modified
                    (#60.05)
                DEFAULT SERVICE TYPE CODE 6            Modified
                    (#60.06)
                DEFAULT SERVICE TYPE CODE 7            Modified
                    (#60.07)
                DEFAULT SERVICE TYPE CODE 8            Modified
                    (#60.08)
                DEFAULT SERVICE TYPE CODE 9            Modified
                    (#60.09)
                DEFAULT SERVICE TYPE CODE 10           Modified
                    (#60.1)
                DEFAULT SERVICE TYPE CODE 11           Modified
                    (#60.11)
                LIMIT LENGTH OF EIV FIELDS?            New
                    (#62.01)
GROUP INSURANCE PLAN (#355.3)                                   Modified
                *GROUP NAME (#.03)                     Modified
                *GROUP NUMBER (#.04)                   Modified
                GROUP NAME (#2.01)                     New
                GROUP NUMBER (#2.02)                   New
INSURANCE BUFFER (#355.33)                                      Modified
                SERVICE DATE (#.18)                    New
                *GROUP NAME (#40.02)                   Modified
                *GROUP NUMBER (#40.03)                 Modified
                *SUBSCRIBER ID (#60.04)                Modified
                *NAME OF INSURED (#60.07)              Modified
                PT. RELATIONSHIP - HIPAA (#60.14)      Modified
                GROUP NAME (#90.01)                    New
                GROUP NUMBER (#90.02)                  New
                SUBSCRIBER ID (#90.03)                 New
                NAME OF INSURED (#91.01)               New
IIV RESPONSE (#365)                                            Modified
                *NAME OF INSURED (#1.01)               Modified
                *SUBSCRIBER ID (#1.05)                 Modified
                *GROUP NAME (#1.06)                    Modified
                *GROUP NUMBER (#1.07)                  Modified
                PT. RELATIONSHIP - HIPAA (#8.01)       Modified
                MILITARY INFO STATUS CODE (#12.01)     New
                MILITARY EMPLOYMENT STATUS (#12.02)    New
                MILITARY GOVT AFFILIATION CODE         New
                    (#12.03)
                MILITARY PERSONNEL DESCRIPTION         New
                    (#12.04)
                MILITARY SERVICE RANK CODE (#12.05)    New
                DATE TIME PERIOD FORMAT QUAL           New
                    (#12.06)
                DATE TIME PERIOD (#12.07)              New
                NAME OF INSURED (#13.01)               New
                SUBSCRIBER ID (#13.02)                 New
```

```
                        GROUP NAME   (#14.01)               New
                        GROUP NUMBER (#14.02)               New
HEALTH CARE CODE INFORMATION sub-file (#365.01)            New
ELIGIBILITY/BENEFIT sub-file (#365.02)                     Modified
                        ELIGIBILITY/BENEFIT INFO (#.02)     Modified
                        COVERAGE LEVEL (#.03)               Modified
                        INSURANCE TYPE (#.05)               Modified
                        TIME PERIOD QUALIFIER (#.07)        Modified
                        MONETARY AMOUNT (#.08)              Modified
                        QUANTITY QUALIFIER (#.1)            Modified
                        AUTHORIZATION/CERTIFICATION (#.12)  Modified
                        IN PLAN (#.13)                      Modified
                        PROCEDURE CODING METHOD (#1.01)     Modified
                        ENTITY ID CODE (#3.01)              Modified
                        ENTITY TYPE (#3.02)                 Modified
                        ENTITY ID QUALIFIER (#3.05)         Modified
                        ENTITY RELATIONSHIP CODE (#3.06)    New
                        LOCATION QUALIFIER (#4.08)          Modified
                        PROVIDER CODE (#5.01)               Modified
                        REFERENCE ID QUALIFIER (#5.03)      Modified
CONTACT PERSON sub-file (#365.03)                          Modified
                        *COMMUNICATION NUMBER #1 (#.03)     Modified
                        *COMMUNICATION NUMBER #2 (#.05)     Modified
                        *COMMUNICATION NUMBER #3 (#.07)     Modified
                        COMMUNICATION NUMBER #1 (#1)        New
                        COMMUNICATION NUMBER #2 (#2)        New
                        COMMUNICATION NUMBER #3 (#3)        New
GROUP PROVIDER INFO sub-file (#365.04)                     New
REJECT REASONS sub-file (#365.06)                          Modified
                        REJECT REASON (#.03)               Modified
                        ACTION CODE (#.04)                 Modified
ADDITIONAL MSGS sub-file (#365.061)                        New
SUBSCRIBER DATES sub-file (#365.07)                        Modified
                        DATE QUALIFIER (#.03)              Modified
GROUP REFERENCE INFORMATION sub-file (#365.09)            New
CONTACT INFORMATION sub-file (#365.26)                     Modified
                        *COMMUNICATION NUMBER (#.03)        Modified
                        COMMUNICATION QUALIFIER (#.04)      Modified
                        COMMUNICATION NUMBER  (#1)          New
HEALTHCARE SERVICES DELIVERY sub-file (#365.27)            Modified
                        QUANTITY QUALIFIER (#.03)           Modified
                        UNITS OF MEASUREMENT (#.05)         Modified
                        TIME PERIOD QUALIFIER (#.07)        Modified
                        DELIVERY FREQUENCY (#.08)           Modified
                        DELIVERY PATTERN (#.09)             Modified
SUBSCRIBER DATES sub-file (#365.28)                        Modified
                        DATE QUALIFIER (#.03)               Modified
                        DATE FORMAT (#.04)                  Modified
SUBSCRIBER ADDITIONAL INFO sub-file (#365.29)              Modified
                        PLACE OF SERVICE (#.02)             Modified
                        QUALIFIER (#.04)                    Modified
                        NATURE OF INJURY CODE (#.05)        New
                        NATURE OF INJURY CATEGORY (#.06)    New
                        NATURE OF INJURY TEXT (#.07)        New
SUBSCRIBER REFERENCE ID sub-file (#365.291)                Modified
                        REFERENCE ID QUALIFIER (#.03)       Modified
SERVICE TYPES sub-file (#365.292)                          Modified
```

```
                      SERVICE TYPES (#.01)              Modified
X12 271 REFERENCE IDENTIFICATION (#365.028)            Modified
X12 271 UNITS OF MEASUREMENT (#365.029)                New
X12 271 ENTITY RELATIONSHIP CODE (#365.031)            New
X12 271 DATE FORMAT QUALIFIER (#365.032)               New
X12 271 YES/NO RESPONSE CODE  (#365.033)               New
X12 271 LOCATION QUALIFER (#365.034)                   New
X12 271 PROCEDURE CODING METHOD (#365.035)             New
X12 271 DELIVERY PATTERN (#365.036)                    New
X12 271 PATIENT RELATIONSHIP (#365.037)                New
X12 271 INJURY CATEGORY (#365.038)                     New
X12 271 MILITARY PERSONNEL INFO STATUS CODE (#365.039) New
X12 271 MILITARY GOVT SERVICE AFFILIATION (#365.041)   New
X12 271 MILITARY SERVICE RANK (#365.042)               New
X12 271 ENTITY TYPE QUALIFIER (#365.043)               New
X12 271 CODE LIST QUALIFIER (#365.044)                 New
X12 271 NATURE OF INJURY CODES (#365.045)              New
X12 271 MILITARY EMPLOYMENT STATUS CODE (#365.046)     New
IIV TRANSMISSION QUEUE (#365.1)                        Modified
                      SERVICE TYPE CODE (#.2)           New
IIV RESPONSE REVIEW (#365.2)                           New
```

Bulletins Associated:

| | New/Modified/ |
Bulletin Name	Deleted
N/A	

Dialogs Associated:

| | New/Modified/ |
Dialog Name	Deleted
N/A	

Forms Associated:

Form Name	File Name (Number)	New/Modified/ Deleted
N/A		

Functions Associated:

| | New/Modified/ |
Function Name	Deleted
N/A	

HL Logical Link:

```
                                               New/Modified/
HL Logical Name                                 Deleted
---------------                                -------------
N/A




HL7 Application Parameters:
                                               New/Modified/
HL7 Parameter Name                              Deleted
------------------                             -------------
N/A




HLO Application Registry:
                                               New/Modified/
HLO Registry Name                               Deleted
-----------------                              -------------
N/A




Help Frames Associated:
                                               New/Modified/
Help Frame Name                                 Deleted
---------------                                -------------
N/A




Mail Groups Associated:
                                               New/Modified/
Mail Group Name                                 Deleted
---------------                                -------------
N/A




Options Associated:
                                               New/Modified/
Option Name               Type                  Deleted
-----------               ----                 -------------
MCCR System Definition Menu  menu              Mofified
[IB SYSTEM DEFINITION MENU]
Medicare Insurance Intake    run routine       Delete
[IBCN MEDICARE INSURANCE
INTAKE]
Update Subscriber Info       run routine       New
[IBCN UPDATE SUBSCRIBER
INFO]
eIV Menu[IBCNE IIV MENU]     menu              Modified
Medicare Potential COB       run routine       New
Worklist[IBCNE POTENTIAL
COB LIST]
```

```
Parameter Definitions:
                                                    New/Modified/
Parameter Name                                       Deleted
--------------                                      -------------
N/A



Parameter Template:
                                                    New/Modified/
Template Name                                        Deleted
-------------                                       -------------
N/A



Protocols Associated:

                                                    New/Modified/
Protocol Name                                        Deleted
-------------                                       -------------
IBCNE MEDICARE COB                                  New
IBCNE MEDICARE COB AC                               New
IBCNE MEDICARE COB CS                               New
IBCNE MEDICARE COB DISP                             New
IBCNE MEDICARE COB EE                               New



Remote Procedures Associated:
                                                    New/Modified/
Remote Procedure Name                                Deleted
---------------------                               -------------
N/A



Security Keys Associated:
                                                    New/Modified/
Security Key Name                                    Deleted
-----------------                                   -------------
N/A



Templates, Input Associated:
                                                    New/Modified/
Template Name     Type       File Name (Number)      Deleted
-------------     ----       ------------------     -------------
IBCN PATIENT      Input      PATIENT (#2)            Modified
INSURANCE
IBCNE GENERAL     Input      IB SITE PARAMETERS (#350.9)  Modified
PARAMETER EDIT



Templates, List Associated:
                                                    New/Modified/
Template Name     Type                                Deleted
```

```
-------------          ----                             -------------
IBCNE                  List                             Modified
ELIGIBILITY/BENEFIT
INFO
IBCNE MEDICARE         List                             New
COB DISPLAY
IBCNE MEDICARE         List                             New
COB LIST


Templates, Print Associated:
                                                     New/Modified/
Template Name          Type       File Name (Number)    Deleted
-------------          ----       ------------------   -------------
N/A



Templates, Sort Associated:
                                                     New/Modified/
Template Name          Type       File Name (Number)    Deleted
-------------          ----       ------------------   -------------
N/A



Additional Information:
N/A



New Service Requests (NSRs)
---------------------------
20110503 -  Electronic Data Interchange (EDI) New Standards and Operating
            Rules (Veterans Health Administration) VHA Provider-Side TCRs



Patient Safety Issues (PSIs)
----------------------------
N/A



Remedy Ticket(s) & Overview
---------------------------
N/A



Test Sites:
----------
REDACTED
```

2.2 Pre/Post Installation Overview

```
**********************************************************************
**********************************************************************
```

```
****************************************************************************

Please read this patch description in its entirety before installing.

The post installation routine of this patch contains significant data
conversions.  A purge of some of the eIV data files, IIV RESPONSE (#365)
and IIV TRANSMISSION QUEUE (#365.1), greatly reduces the conversion time.
When the purge was run at test sites prior to the install, the
installation of this patch took between 1-4 hours.  When the files were
not purged prior to the install, the installation did not complete in a
reasonable amount of time.

Some sites have not purged eIV data in a long time, if ever.  There is an
option, Purge eIV Transactions [IBCNE PURGE IIV DATA] option, built into
eIV to purge data.  It allows old data to be purged, but retains at least
the last 6 months.  Data older than 6 months in these files is not current
enough to be useful. There are instructions on how to run the purge later
in this patch description.  If the files have not been recently
purged, this purge may result in significant journaling activity that
could fill up journal disks.  System managers should be made aware so
that journal growth can be monitored and managed accordingly.

Unless your site routinely runs the purge, it is CRITICAL that the purge
is executed prior to the install!  The purge should NOT be run on the same
night as the installation of this patch.

If for some reason the installer does not run the purge, the conversions
will take significantly longer and potential for journaling and
installation issues increase.

Finally, since the post installation takes quite a while depending on the
site, it is IMPERATIVE that this patch is queued for installation. This is
also explained in greater detail in the patch installation instructions
later in this patch description.

****************************************************************************
****************************************************************************
****************************************************************************

Pre/Post Installation Overview
------------------------------------------------------------------------


1.      As part of the requirement to accept all X12 codes and qualifiers
already validated prior to being sent to VistA in the 271 transaction
from FSC's Eligibility Communicator, a number of data elements contained
in entries in the IIV RESPONSE file (#365) and in the INSURANCE TYPE
sub-file (#2.312) of the PATIENT file (#2) need to be converted from a
SET OF CODES to POINTERS to specific code entries in the various X12
files.   The post-install implements this data conversion.  It first
converts the entries the IIV RESPONSE (#365) file and then continues with
the entries in the INSURANCE TYPE (#2.312) sub-file.

Although entries in the INSURANCE TYPE (#2.312) file CANNOT be purged, it
is strongly recommended that any entries in the IIV RESPONSE file (#365)
that are older than 6 months be purged.  This purge can have a
significant impact on how long it takes to run the install with respect
to the data conversion depending when the last time this file was
```

purged. In some cases it has never been purged and contains almost ten
years of response data. Please refer to the pre-installation
instructions for performing the purge.

2.   In order to satisfy the requirement of being able to store longer
fields, a number of fields needed to be duplicated and the post-install
will copy data from the shorter fields to the new, longer fields.

3.   A one-time subscriber update utility must be scheduled upon
installation of the patch. Unless the installation is queued, the
post-install will prompt the installer of the patch to schedule this
activity for off-hours. If the installation is queued, the new update
utility will be scheduled for Tomorrow at 9 PM.   This is in order to
give the conversions time to complete. NOTE: This part of the process
does NOT require that IB users be off the system, or un-scheduling of
the eIV Nightly Process [IBCNE IIV BATCH PROCESS] option.

4.   The eIV Nightly Process [IBCNE IIV BATCH PROCESS] option will
need to be unscheduled before performing the installation of the patch.
Once the installation and post-install conversion procedures are
completed, the option will need to be rescheduled.

2.3   Installation Instructions

Pre-Installation Instructions

The following 2 tasks should be performed before installing IB*2*497.

1.   Purge eIV Transactions [IBCNE PURGE IIV DATA] option

To help reduce the time it takes to perform the installation due
to the data conversion, it is strongly recommended that a day or
two before installing the patch, the Purge eIV Transactions [IBCNE PURGE
IIV DATA] option should be run in order to purge the eligible response
records. This option schedules the purge to run at 8 pm TODAY. If it
is already past 8 PM today, it should start up almost immediately.

Note: Please make sure the purge has completed prior to running the
install. The purge process does NOT require that IB users be off the
system, or un-scheduling of the eIV Nightly Process [IBCNE IIV BATCH
PROCESS] option.

Example of running the eIV option below:

Select OPTION NAME: IBCNE PURGE IIV DATA   Purge eIV Transactions
Purge eIV Transactions

        Purge Electronic Insurance Verification (eIV) Data Files

 This option will allow you to purge data from the eIV Response File
(#365) and the eIV Transmission Queue File (#365.1). The data must be at

least six months old before it can be purged. Only insurance transactions
that have a transmission status of "Response Received", "Communication
Failure", or "Cancelled" may be purged. You will be allowed to select a
date range for this purging. The default beginning date will be the date
of the oldest eligible record in the system. The default ending date will
be six months ago from today's date. You may modify this default date
range. However, you may not select an ending date that is more recent
than six months ago.

Enter the purge begin date: 10/10/2003//   (OCT 10, 2003)

  Enter the purge end date: 03/05/2013//   (MAR 05, 2013)

 You want to purge all eIV data created between 10/10/2003 and 03/05/2013.

 OK to continue? NO// YES

 Task# 155226 has been scheduled to purge the eIV data tonight at 8:00 PM.

2.   eIV Nightly Process [IBCNE IIV BATCH PROCESS] option

Since the installation of this patch could take a number of hours
to complete due to the conversion procedures, it will be necessary to
unschedule the eIV Nightly Process [IBCNE IIV BATCH PROCESS] option
before installing the patch. An example of unscheduling this task
below:

Select Taskman Management <TEST ACCOUNT> Option: SCHEDule/Unschedule
Options

Select OPTION to schedule or reschedule: IBCNE IIV BATCH PROCESS
eIV NIGHT LY PROCESS
        ...OK? Yes//   (Yes)   (R)
                        Edit Option Schedule
    Option Name: IBCNE IIV BATCH PROCESS
    Menu Text: eIV NIGHTLY PROCESS   TASK ID: 279418
_____

    QUEUED TO RUN AT WHAT TIME: SEP 4,2013@07:00 @ ? Enter the '@' sign.
                            This will automatically delete the date/time
 DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

      RESCHEDULING FREQUENCY: 1D

            TASK PARAMETERS:

          SPECIAL QUEUEING:
_____
 Exit   Save   Next Page   Refresh

 Enter a command or '^' followed by a caption to jump to a specific field.

```
       Edit Option Schedule
       Option Name: IBCNE IIV BATCH PROCESS
       Menu Text: eIV NIGHTLY PROCESS                        TASK ID:

  _____

   QUEUED TO RUN AT WHAT TIME:

 DEVICE FOR QUEUED JOB OUTPUT:

  QUEUED TO RUN ON VOLUME SET:

       RESCHEDULING FREQUENCY: 1D

            TASK PARAMETERS:

            SPECIAL QUEUEING:

  _____
 Exit      Save      Next Page      Refresh

 Enter a command or '^' followed by a caption to jump to a specific field.


 COMMAND: S ? Save the work                      Press <PF1>H for help
 Insert

       Edit Option Schedule
       Option Name: IBCNE IIV BATCH PROCESS
       Menu Text: eIV NIGHTLY PROCESS                        TASK ID:

  _____


 QUEUED TO RUN AT WHAT TIME:

 DEVICE FOR QUEUED JOB OUTPUT:

  QUEUED TO RUN ON VOLUME SET:

       RESCHEDULING FREQUENCY: 1D

            TASK PARAMETERS:

            SPECIAL QUEUEING:

  _____
 Exit      Save      Next Page      Refresh

 Enter a command or '^' followed by a caption to jump to a specific field.


 COMMAND: E  ? Exit, You're done                 Press <PF1>H for
 help     Insert
```

```
Installation Instructions
------------------------------------------------------------------------


It is *strongly* recommended that this patch be installed outside of
normal working hours.  This patch contains multiple file/field conversions
and running time depends on a number of factors. Running time could be
anywhere from a couple hours to numerous hours to install.  Instructions
are provided for running install in background.

**** NO INTEGRATED BILLING USERS SHOULD BE ON THE SYSTEM DURING
INSTALLATION OF THIS PATCH. ****

**** Do not install this patch when the eIV NIGHTLY PROCESS [IBCNE IIV
BATCH PROCESS] background job is running or scheduled to run. Please refer
to the Pre-installation instructions for the unscheduling of this
option.****

There are no additional menu options to disable.

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, you may elect to use the
    following option. When prompted for the INSTALL enter the patch #(
    IB*2.0*497):

    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, DD's, 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 'Want KIDS to Rebuild Menu Trees Upon Completion of
    Install? YES//'

    Options are being added as well as removed, so Rebuilding Menu Trees
    is recommended.

6.  When prompted 'Want KIDS to INHIBIT LOGONs during the install?
    NO//'

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

    Again, no Integrated Billing Users should be on the system and install
    Should occur outside of normal working hours.
```

8. A one-time subscriber update utility must be scheduled upon
    installation of the patch. During installation, the post-install
    routine prompts for the installer to schedule the one time subscriber
    update utility and will not complete installation until it is
    scheduled. If the install is queued to run, it will automatically
    schedule this utility to run TOMORROW @ 9PM. ***Queuing install is
    strongly recommended***

******** INSTRUCTION FOR QUEUEING INSTALL ************************

8a. At the 'DEVICE:' prompt, enter 'Q' for Queue to run this in
     background. You will then be prompted for 'DEVICE:' again. This is
     for where you would like the output from the Queued install to be
     directed. You may enter NULL, HFS, or any other DEVICE that allows
     it to be accessed from a Queued job.   If you choose not to queue the
     install, there is a good chance that this install will not complete
     without experiencing a network timeout and will need to be
     restarted. While it was written so that the post-install could pick
     up where it left off, the post-install conversion needs to complete
     as close to the install which includes the data dictionary changes as
     possible.

******** INSTRUCTION FOR RUNNING INSTALL IN FOREGROUND **************

8b. At the 'DEVICE' prompt, hit the return key which will enable the
     Install to run in the foreground. Installation results are displayed
     to the screen. The prompt to schedule the one-time subscriber update
     utility is issued to the installer. The following shows an example
     of the message and then the date/time prompt that is generated:

Creating Task to update the Insurance Type File...
*************************** IMPORTANT!! *******************************
This option will scan through the entire Patient File for patients with
insurance where the relationship to insured is self. Certain fields in
Insurance Type sub-file will be updated to match the patient data if it
does not already exist. This will take a while and must be queued to run
in the background when there are few users on the system. The default is
Tomorrow at 9:00 p.m. AGAIN PLEASE NOTE: This tasked job does NOT require
that IB users be off the system, or un-scheduling of the eIV NIGHTLY
PROCESS [IBCNE IIV BATCH PROCESS] option when it runs.

Enter date/time to queue the option: T+1@2100//

Update Subscriber Information Scheduled for SEP 06, 2013@21:00

Post-Installation Instructions
----

1. In order to verify the post-install routine was run successfully,
   please examine the patch entry in the INSTALL file and report any error

```
   messages to Product Support.

2. After the installation has completed, and if allowed by your Kernel
   site parameter configuration, confirm the post-install routine,
   IBY497PO, was removed.

3. Once the patch has COMPLETED INSTALLATION, which can take several
   hours, reschedule the eIV NIGHTLY PROCESS [IBCNE IIV BATCH PROCESS]
   option that was unscheduled at pre-installation.


Routine Information:
====================


The second line of each of these routines now looks like:
 ;;2.0;INTEGRATED BILLING;**[Patch List]**;21-MAR-94;Build 120

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

Routine Name: IBCNBAC
    Before: B51548829   After: B51549169   **184,497**
Routine Name: IBCNBAR
    Before: B44012684   After: B44889067   **82,240,345,413,416,497**
Routine Name: IBCNBCD
    Before: B87228703   After: B99276499   **82,251,361,371,416,438,452,497**
Routine Name: IBCNBEE
    Before: B46620313   After: B45711543   **82,184,252,251,356,361,371,
                                             377,416,438,452,497**
Routine Name: IBCNBES
    Before:  B7989957   After:  B8711337   **82,184,345,438,497**
Routine Name: IBCNBES1
    Before:  B5819262   After:  B5819713   **141,497**
Routine Name: IBCNBLE
    Before: B85092127   After:B105786784   **82,231,184,251,371,416,435,
                                             452,497**
Routine Name: IBCNBLP
    Before: B24695524   After: B25507553   **82,497**
Routine Name: IBCNBMI
    Before: B90850379   After: B91864404   **82,184,246,251,299,345,361,
                                             371,413,416,438,452,497**
Routine Name: IBCNBU1
    Before: B33733092   After: B34498281   **82,184,263,438,497**
Routine Name: IBCNEBF
    Before: B46987961   After: B46385823   **184,271,361,371,416,438,497**
Routine Name: IBCNEDE
    Before: B19636990   After: B34057908   **184,271,300,416,438,497**
Routine Name: IBCNEDE1
    Before: B43189276   After: B44623085   **184,271,416,438,435,467,497**
Routine Name: IBCNEDE5
    Before: B26929333   After: B28666402   **184,271,416,497**
Routine Name: IBCNEDE6
    Before: B32927570   After: B32414593   **184,271,345,416,497**
Routine Name: IBCNEDE7
    Before: B24645310   After: B27880444   **271,416,438,497**
Routine Name: IBCNEDST
```

```
      Before:      n/a   After: B52803166  **497**
Routine Name: IBCNEHL1
      Before:B244020766   After:B206919324  **300,345,416,444,438,497**
Routine Name: IBCNEHL2
      Before: B62824990   After: B70236887  **300,345,416,438,497**
Routine Name: IBCNEHL3
      Before: B72667613   After:B168485042  **300,416,497**
Routine Name: IBCNEHL4
      Before:B136544352   After:B174356077  **300,416,438,497**
Routine Name: IBCNEHL5
      Before:      n/a   After: B11250093  **497**
Routine Name: IBCNEHLM
      Before: B21127231   After: B26579443  **184,251,300,416,438,497**
Routine Name: IBCNEHLQ
      Before: B43557440   After: B44383583  **184,271,300,361,416,438,467,497**
Routine Name: IBCNEHLU
      Before: B53561238   After: B88168048  **184,300,416,438,497**
Routine Name: IBCNEQU
      Before:B109122026   After:B126099513  **184,271,416,438,497**
Routine Name: IBCNERPE
      Before: B42391865   After: B60593817  **271,300,416,438,497**
Routine Name: IBCNERPI
      Before:      n/a   After: B43723857  **497**
Routine Name: IBCNERTQ
      Before: B45372080   After: B44184624  **438,467,497**
Routine Name: IBCNES
      Before: B25439392   After: B28429551  **416,438,497**
Routine Name: IBCNES1
      Before:B120790247   After:B145502085  **416,438,497**
Routine Name: IBCNES3
      Before:      n/a   After: B25873283  **497**
Routine Name: IBCNESI
      Before:      n/a   After: B17756591  **497**
Routine Name: IBCNESI1
      Before:      n/a   After: B73077962  **497**
Routine Name: IBCNESI2
      Before:      n/a   After: B50676612  **497**
Routine Name: IBCNEUT1
      Before: B33603643   After: B35326232  **184,497**
Routine Name: IBCNEUT4
      Before: B50167663   After: B50266196  **184,271,345,416,497**
Routine Name: IBCNSC4
      Before: B17661433   After: B18086570  **43,85,103,251,416,497**
Routine Name: IBCNSEVT
      Before: B2530934   After:  B4726698  **6,497**
Routine Name: IBCNSJ3
      Before: B16975505   After: B17659726  **28,497**
Routine Name: IBCNSM31
      Before: B20882944   After: B21224087  **6,28,68,413,497**
Routine Name: IBCNSM5
      Before: B20324152   After: B21379064  **28,497**
Routine Name: IBCNSMM1
      Before: B25964261   After: B27818840  **103,359,497**
Routine Name: IBCNSOK
      Before: B25432692   After: B26943633  **497**
Routine Name: IBCNSOK1
      Before: B12417789   After: B13344891  **497**
```

```
Routine Name: IBCNSP
    Before: B42954824   After: B48468493
**6,28,43,52,85,251,363,371,416,497**
Routine Name: IBCNSP0
    Before: B34211643   After: B37737467  **28,43,52,85,93,103,137,229,
                                            251,363,371,399,438,458,497**
Routine Name: IBCNSP01
    Before: B38322308   After: B52258890
**43,52,85,251,371,377,416,452,497**
Routine Name: IBCNSP1
    Before: B59835347   After: B60114361  **6,28,40,43,52,85,103,361,371,
                                            377,497**
Routine Name: IBCNSP3
    Before: B35837178   After: B38854605  **28,52,85,251,371,497**
Routine Name: IBCNSU2
    Before: B19118425   After: B19732446  **28,62,497**
Routine Name: IBCNSU41
    Before: B21365764   After: B22019975  **52,211,240,497**
Routine Name: IBCNUPD
    Before:       n/a   After: B15205533  **497**
Routine Name: IBJPI5
    Before: B37149088   After:  B4489364  **438,497**
Routine Name: IBJTCA1
    Before: B53091604   After: B52135617  **39,80,106,137,223,276,363,
                                            384,432,452,473,497**
Routine Name: IBY497PO
    Before:       n/a   After:B137982293  **497**

Routine list of preceding patches: 62, 141, 359, 458, 467, 473
```

(This page included for two-sided copying.)

3 Enhancements

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

3.1 Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS]

- **AAA Errors – Response Report**

Provides the ability for users to view the Error Reporting Codes and corresponding textual description in the Response Report View of the Insurance Buffer when an error Reporting Code is received in response to an X12N/5010 Health Care Eligibility Benefits Inquiry (270).

- **X12N/5010 271 Code Sets – Expanded Benefits**
  Provides the ability to receive the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.

- **X12N/5010 271 Code Sets – Expanded Benefits**
  Provides the ability to store the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.

- **X12N/5010 271 Code Sets – Expanded Benefits**
  Provides the ability to display the all Codes and Qualifiers in Expanded Benefits when received in an X12N/5010 Health Care Eligibility Benefits Response (271) without validation.

3.2 HL7 Transactions Related to 270/271 Transactions/Daily Registration Messages

- **Daily Statistics to FSC**
  Transmits additional statistical information in the daily eIV registration message (HL7 MFN message) to the FSC in Austin, Texas.

- **270 - Transmit Insured Name – Patient Subscriber**
  Transmits the NAME OF INSURED Field (2.312:17) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is a value in the NAME OF INSURED field.

- **270 - Transmit Patient Name – Patient Subscriber**
  Transmits the NAME Field (2: .01) in the PID segment of the 270 HL7 message when the patient is the subscriber and there is no value in the Name of Insured field.

- **270 - Transmit Patient Name – Patient Not Subscriber**
  Continues to transmit the NAME Field (2: .01) in the PID segment and the NAME OF INSURED field in the GT1 segment (2.312:17) of the 270 HL7 message when the patient is not the subscriber.

- **270 - Extract – Default Service Type Codes**
  Automatically includes the 30-Health Benefit Plan Coverage default Service Type code replacing the current list of codes in the NTE segment of the 270 HL7 messages transmitted automatically through the buffer extract.

- **270 – Receive EB*V~MSG*additional Error Message Text~ – AAA Error Message Text**
  Provides the ability to receive the AAA additional Error Message Text when received in an X12N/5010 Health Care Eligibility Benefits Response.

- **270 – Store EB*V~MSG*additional Error Message Text~ – AAA Error Message Text**
  Provides the ability to store the AAA additional Error Message Text when received in an X12N/5010 Health Care Eligibility Benefits Response.

- **270 – Display EB*V~MSG*additional Error Message Text~ – AAA Error Message Text**
  Provides the ability to display the AAA additional Error Message Text on the Response Report View of the Insurance Buffer when received in an X12N/5010 Health Care Eligibility Benefits Response.

- **270 – Transmit Registration Message after initial installation of the Patch**
  Transmits a registration message upon initial installation of the software into production at each VAMC informing FSC of the upgrade to the new interface version.

3.3   Patient Insurance Info View/Edit [IBCN PATIENT INSURANCE]

- **Update Subscriber Information**
  Includes a new option required to be scheduled to update the subscriber fields in the Insurance Type file, with the values stored in the Patient file, upon installation of the software at a site when the patient's relationship to the insured is self (18) and the field is blank and the insurance policy is Active.

3.4   MCCR System Definition Menu [IB SYSTEM DEFINITION MENU]

- **Add New Option for Subscriber Information**
  Includes a new option to provide the ability for users holding the IB SUPERVISOR KEY to update subscriber fields in the Insurance Type sub-file for all patients, with the values stored in the Patient file, when the patient's relationship to the insured is self (18) and the field is blank and the insurance policy is Active.
- **Store Default Service Type Codes**
  Stores only Service Type Code 30 – Health Benefit Plan Coverage in the IB Site Parameters file accessible from [MCCR Site Parameter Display/Edit].
- **Site-defined Service Type Codes**
  No longer allow users to define Service Type codes by site, to be included automatically in 270 HL7 messages.
- **Remove Existing Site-defined Service Type Codes**
  Updates the IB Site Parameters file (350.9) to remove all site-defined Service Type codes after the software is installed.

- **Site-defined Service Type Codes Screen Display**
  No longer contains a section on the [MCCR Site Parameter Display/Edit] ListManager screen to display Service Type codes by site.

3.5   Medicare Insurance Intake [IBCN MEDICARE INSURANCE INTAKE]

- **Remove Medicare Insurance Intake Option**
  No longer provides the ability for users to enter Patient Insurance information through the Medicare Insurance Intake option, [IBCN MEDICARE INSURANCE INTAKE].

3.6 Integrated Billing Reports

- **Third Party Joint Inquiry [IBJ THIRD PARTY JOINT INQUIRY]**
- **Claims Tracking Edit [IBT EDIT BI TRACKING ENTRY]**
- **Patient Insurance Info View/Edit [IBCN PATIENT INSURANCE]**
- **Process Insurance Buffer [IBCN INSURANCE BUFFER PROCESS]**
- **eIV Response Report [IBCNE IIV RESPONSE REPORT]**
- **eIV Ambiguous Policy Report [IBCNE IIV AMBIGUOUS POLICY RPT]**
- **eIV Inactive Policy Report [IBCNE IIV INACTIVE POLICY RPT]**

3.7 Request Electronic Insurance Inquiry [IBCNE REQUEST INQUIRY]

- **Eligibility Date Criteria**
- **Eligibility Date Default**
- **Eligibility Date Transmission**
- **270 Individual Request - Default Service Type Codes**
- **270 Individual Request - Default Service Type Codes**