RESOURCE AND PATIENT MANAGEMENT SYSTEM

Contract Health Services Management Information System

(ACHS)

Addendum to User Manual

Version 3.1 Patch 29
September 2021

Office of Information Technology
Division of Information Technology

Table of Contents

1.0   Introduction

Review these changes and add a copy of them to any printed documentation your site is using for CHS v3.1. These changes will be integrated into future versions of the software and user manuals. These changes will no longer be considered an addendum at the time of the next version release.

1.1   System of Award Management (SAM) Unique Entity Identifier Changes

By March 25, 2022, the Data Universal Numbering System (DUNS) number will be phased out as the Unique Entity Identifier (UEI) for entity record in favor of a new, non-proprietary identifier generated and assigned by SAM.gov. Integrated Award Environment (IAE) systems such Unified Financial Management System (UFMS) will need to be modified to accommodate this new change.

CHSMIS change includes three (3) new fields.

- 12-character UEI

- 4-character EFT indicator

- Object Class code field increased to 5 characters

1.2   Summary of Changes

Patch 29 includes these changes:

- Implementation of UEI for UFMS Transmissions

- Vendor UEI reports

- New options of Export Files

    – Electronic Purchase Order verification from the FI
    – Exported Purchase Order detail view
    – Export summary of purchase orders

- Automated new fiscal year setup

- New UFMS directory for direct transmission

- CHS application banner display Preferred Name

- Social Security Redaction on printed Purchase Order

Bug Fixes

- Do not allow re-export of paid claims to the FI – Tribal site related

- Leading zeros in the facility code causing endless loop issue

- Fix Vendor Usage report for blanket purchase orders

2.0   Patch 29 Changes

2.1   Implementation of UEI for UFMS Transmissions

The new UEI and EFT fields will be captured in the Vendor File. The UEI effective date will be March 25, 2022, but UFMS will accept the new record format September 29, 2021. A vendor file has been provided by UFMS to match against the DUNS and will populate the UEI on installation.

1. Go to the CHS Menu – VEN Provider/Vendor Data menu option.

2. Select **Vendor** to update UEI.

   - Item **#14 UEI** (alphanumeric 12-character excluding letter O and I)

   - Item **#16 for EFT** (4-character)

```
PROVIDER/VENDOR UPDATE

********************************************************************************
 1) PHYSICIAN/MED/CTR\HOSPITAL                 2) EIN No: 1880100295
 3) Status: ACTIVE                             4) Contracts: NONE
 5) UPIN:                                      6) Rate Quotation: NONE ACTIVE
 7) Type of Business:                          8) Agreement: NONE
 9) Medicare Provider: No entry               10) BPA: NONE
11) E-Mail:                                   12) DUNS: 999999999
13) Direct Participant:                       14) UEI:
15) Direct E-Mail:                            16) EFT:

**** MAILING/BILLING ADDRESS ****          **** PROVIDER LOCATION ADDRESS ****
15) Street: 1060 HIGHWAY 95                 16) Street:
     City: RIVERA                               City:
    State: ARIZONA       Zip: 86442            State:
    Phone:            Fax:                  Zip Code:
     Attn:
17) Vendor Type: PHYSICIAN                  18) Fed/Non-Fed:
19) Specialty:                              20) Geographic Loc:
  Last Payment Date:                        Current FYTD Paid:
```

2.2   Vendor UEI Reports (Matched/Possible/Unmatched)

New reports to assist sites of the matched, possible matched and unmatched Vendors in the database from the UFMS provided file. The matched report is determined on the DUNS matching the UFMS file and will update the UEI field. The possible matched report is determined on the EIN matching the UFMS file and will not update the UEI field. The unmatched did not match either the DUNS or EIN and will not update the UEI field for any of the vendors in the database. This unmatched list contains UFMS vendors and may be used as a reference. These reports should be reviewed to verify the most used Vendors have a UEI populated.

1. Go to the CHS | PR | VRPT | VUEI menu.

2. Select the **VUEI** option.

3. Select 1 – Matched Vendor, 2 – Possible Matched Vendor, 3 – Unmatched Vendor.
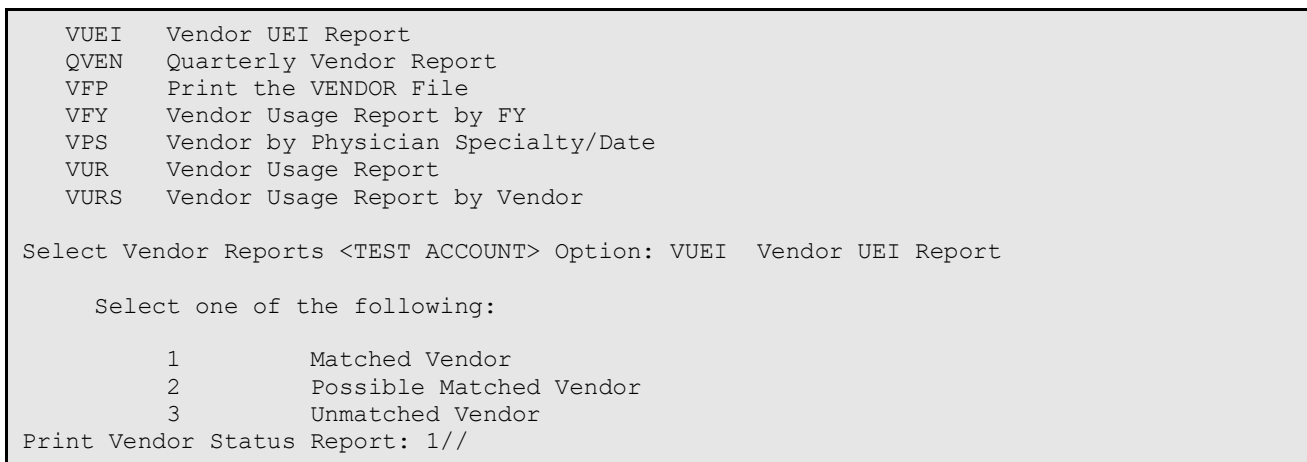
4. Select the option to Print or Browse.

```
    VUEI    Vendor UEI Report
    QVEN    Quarterly Vendor Report
    VFP     Print the VENDOR File
    VFY     Vendor Usage Report by FY
    VPS     Vendor by Physician Specialty/Date
    VUR     Vendor Usage Report
    VURS    Vendor Usage Report by Vendor

Select Vendor Reports <TEST ACCOUNT> Option: VUEI  Vendor UEI Report

     Select one of the following:

          1          Matched Vendor
          2          Possible Matched Vendor
          3          Unmatched Vendor
Print Vendor Status Report: 1//
```

Figure 2-1: Vendor UEI Report

```
                          CHS VENDOR UEI REPORT              Page: 1
                           For Matched Vendors
===============================================================================
RPMS VENDOR                  UFMS VENDOR                 UEI          DUNS
---------------------------- ---------------------------- ------------ ---------
SONORA QUEST LABORATORIES     SONORA QUEST LABORATORIES LL N4EWM4KT4PH7 014438001
ARTISAN PROSTHETICS           ARTISAN PROSTHETICS LLC 1427 SLH3JM9XWBW4 019923783
BANNER DESERT MED CTR         BANNER HEALTH 341417         KTJVB9J49868 027021448
PONGRATZ ORTHO & PROSTHETICS PONGRATZ ORTHOTICS & PROSTHE KQBNELSBJZX7 036780401
===============================================================================
Total Vendor UEI
     Total Matched: 30
```

Figure 2-2: Vendor UEI Matched Report

```
                        CHS VENDOR UEI REPORT              Page: 1
                       For Possible Matched Vendors
==============================================================================
RPMS VENDOR                    UFMS VENDOR                 EIN        UEI
---------------------------    ------------------------    ---------- ------------
YAKIMA VALLEY RADIOLOGY        YAKIMA VALLEY RADIOLOGY 946 2910861108 PCMANGYLFZJ4
CLINICAL PARTNERS PA MT VIST   CLINICAL PARTNERS, P.A. 123 2010672601 U18BH235LN51
SHARED IMAGING LLC             SHARED IMAGING LLC 1085810  2261730120 JC1NF9H7RNK5
==============================================================================
Total Vendor UEI
     Total Possible Matched: 3
```

Figure 2-3: Vendor UEI Possible Report

```
                        CHS VENDOR UEI REPORT              Page: 38
                       For Unmatched Vendors
==============================================================================
UFMS VENDOR                                    EIN        UEI          DUNS
---------------------------------------------  ---------- ------------ --------
BIOSCRIP, INC 686171                           2050489664 MXXML7T3VK51 957126931
SURGERY CENTER OF LAWTON PLLC 1158604          2731579076 RPLREKCXA9J4 959564113
VITALITY MEDICAL INC 1444941                   2412116102 GK8FSUJMQBT6 961195539
MYRIAD GENETICS LABORATORIES, INC. 376578      2870514323 H7C7T3D6ZSB8 962592424
BIGHORN VALLEY HEALTH CENTER INC 1575313        2273113428 GALQGCNCE367 963704577
==============================================================================
Total Vendor UEI
     Total Not Matched: 531
```

Figure 2-4: Vendor UEI Unmatched Report

2.3   Electronic Purchase Order Verification from the FI

This option is for Areas and Sites with Direct transmission to the view the Electronic Purchase Order Verification (EPOV) receipt for tracking of exported files received at the Fiscal Intermediary (FI). Sites have reported issues with files not being received at the FI, this option provides a receipt file from the FI that the file has been received.

The option is locked with security key (ACHSZTXEPOV). The option is only available to Area Offices or Direct Transmission sites. The option looks in the c:\usr\spool\chsdata\epov directory for window servers and /usr/spool/chsdata directory for Unix servers.

Area option

1. Go to the ACHS | EPOV menu.

2. Select the **EPOV** option.

3. Select the item # from the list.

4. The EPOV receipt is displayed in browser view.

Site option

1. Go to the CHS | MGT | XPOR| EPOV menu.

2. Select the **EPOV** option.

3. Select the item # from the list.

4. The EPOV receipt is displayed in browser view.

```
    ACON    Area CHS Consolidate/Splitout Data From Facilities
    DHRL    Print AO CHS DHR Data
    EOBP    Area CHS Process EOBR DATA ...
    VEPO    View FI EPOV file
    AOPO    AO PO Transactions ...
    PAR     Edit Area Office CHS Parameters
    SVRP    AO Special Vendor Report

Select Area Office CHS Data Processing <TEST ACCOUNT> Option: VEPO  View FI EPOV file
```

Figure 2-5: Area VEPO menu option

```
    CDPE    CHS data - prepare for export
    RETD    Re-Export CHS Transmission Data
    XPT     Mark Patient For Export
    XVEN    Mark Vendor For Export
    CEXS    CHS Export Summary
    EDID    Export Document View   VEPO   View FI EPOV file

Select Data Export <TEST ACCOUNT> Option:  VEPO  View FI EPOV file
```

Figure 2-6: Site VEPO menu option

```
EPOV Files available:

Item    File Name                  Run Date
====    ========================   ========
   1    epov.001.364120006.txt     12/29/20
   2    epov.001.365113004.txt     12/30/20
   3    epov.001.366113004.txt     12/31/20


Choose Item #:  (1-3):

OUTPUT BROWSER                    Aug 02, 2021 14:11:47         Page:    1 of    2

xx1REPORT:  IHSCF424:                                 IHS/PRC FISCAL INTERMEDIA
                                      PAGE     1
xx RUN DATE 12/29/20                                    AREA RECORD COUNT TOTAL
                                      TIME 11:28:03


xx PROCESSED FACILITY 999401 FROM 122420 TO 122820 BATCH 122820         864
xx PROCESSED FACILITY 999601 FROM 122820 TO 122920 BATCH 122920         256
xx PROCESSED FACILITY 999510 FROM 122820 TO 122920 BATCH 122920         306
xx PROCESSED FACILITY 999101 FROM 122820 TO 122920 BATCH 122920         142

xx0  TOTAL FACILITIES READ =       1,568
xx0  BATCH HEADER/TRAILOR  =           3
xx0  TOTAL RECORDS READ    =       1,571
xx0  INVALID OBLIGATIONS   =           0
xx0  VALID OBLIGATIONS     =           0
xx0  TOTAL OBLIGATIONS     =           0 (OBLIGATION RECORDS)
xx0  TOTAL PATIENT RECORDS =         962 (PATIENT RECORDS)
xx0  TOTAL PROVIDER RECORDS=           2 (PROVIDER RECORDS)
xx0  TOTAL PURCHASE ORDERS =         600 (PURCHASE ORDER RECORDS)
xx0  TOTAL RECORDS BYPASSED=           7

+        Enter ?? for more actions                                       >>>
+    NEXT SCREEN        -    PREVIOUS SCREEN      Q    QUIT
Select Action: +//
```

Figure 2-7: EPOV FI receipt file view

2.4   Exported Purchase Order Detail View

New purchase order detail view. The detail includes the date/time PO exported (may be multiple) and export file name the PO is contained in. In addition, the display includes the referral number and preferred name, only if entered in the Registration application.

1. Go to the CHS | MGT | XPOR | EDID menu.

2. Select the **EDID** option.

3. Select purchase order document.

4. The detail view of the PO is displayed.

```
    CDPE    CHS data - prepare for export
    RETD    Re-Export CHS Transmission Data
    XPT     Mark Patient For Export
    XVEN    Mark Vendor For Export
    CEXS    CHS Export Summary
    EDID    Export Document View
    VEPO    View FI EPOV file


Select Data Export Option: EDID  Export Document View
```

Figure 2-8: EDID menu option

```
Select Document:  1-00010        07-29-21     OPEN     1

Form # 64                                     REF TYPE     Order No.
Jul 29, 2021                    Outpatient Service     2      1-H01-00010
                                           HHS Order No:  HHSI2472021H0100010U
-------------------------------------------------------------------------------
Export: Jul 29, 2021@16:17          FILE: ACHS232101.20210729_161724


-------------------------------------------------------------------------------
IHS#: 99935 Ref #: 2321012100024      | Fac: 232101
TREE,BANANA - YELLOW*                  | Est. date-of-svc.: Jul 29, 2021
11-30-1955 F                           | MEDICAL EVAL
MCR=414124444A MCD=123456 PVT INS      | Hosp Ord #:  ---
NAVAJO TRIBE, AZ NM AND UT             | Estimated Charge: $350.00
-------------------------------------------------------------------------------
Auth. From Jul 29, 2021 to Aug 08, 2021 |  LTD ARTHRITIS CENTER
SCC: 25.2L                             | 3330 N. 2ND ST, #601
DCR Acct. = OTHER                      | PHOENIX, AZ  85012
CAN/OBJ: J400774 / 25.6R   ---         | 1860432015    Open Market
Actual DOS: ---   DESTINATION: FI      |
-------------------------------------------------------------------------------
    Initial Obligation         350.00
    Amount Canceled:             0.00  ( Items)
    Amount Of Supplements        0.00  ( )
                              --------
CURRENT OBLIGATION BALANCE     350.00       (IHS) (3rd PARTY)
```

Figure 2-9: Export Document Detail View

2.5   Export Summary of Purchase Orders

New report of exported files. Detailed report to assist sites with batch date exported, export type, file name, PO number, Destination, Document Type, Patient Name, Vendor, estimated cost and number of POs.

1. Go to the CHS | MGT | XPOR | CEXS menu.

2. Select the **CEXS** option.

3. Select the beginning and ending export timeframe.

4. Select the Print or Browse option.

```
    CDPE    CHS data - prepare for export
    RETD    Re-Export CHS Transmission Data
    XPT     Mark Patient For Export
    XVEN    Mark Vendor For Export
    CEXS    CHS Export Summary
    EDID    Export Document View
    VEPO    View FI EPOV file


Select Data Export Option: CEXS    CHS Export Summary
```

Figure 2-10: CHS Export Summary menu option

```
CHS EXPORT SUMMARY

Select beginning export:  T-4  (JUL 29, 2021)

Select ending export:  T  (AUG 02, 2021)

ITM# EXPORT DATE          FILE NAME                    # RECORDS  EXPORT TYPE

   1 Jul 29, 2021@16:17 ACHS232101.20210729_161724       31    Re-export UFMS
   2 Jul 29, 2021@12:53 ACHS232101.20210729_125356       19    Re-export UFMS

Choose Item #:  (1-2): 1


     Select one of the following:

         P          PRINT Output
         B          BROWSE Output on Screen

Do you wish to: P// RINT Output
DEVICE: HOME//
```

Figure 2-11: CHS Export beginning/ending export selection

```
                         CHS EXPORT SUMMARY              Page: 1

BATCH DATE:  Jul 29, 2021@16:17
EXPORT:  Re-export UFMS
FILE NAME:  ACHS232101.20210729_161724
================================================================================
P.O. NUMBER DEST TYPE PATIENT                  VENDOR                 EST COST
----------- ---- ---- ------------------------ ---------------------- --------
1-H01-00008 FI   64-I TREE,ALMOND              PHYSICIAN GROUP OF ARIZ  500.00
1-H01-00009 FI   64-I TREE,ASPEN               ARIZONA ALLERGY ASSOCIA  700.00
1-H01-00010 FI   64-I TREE,BANANA              ARTHRITIS CENTER, LTD    350.00
1-H01-00011 FI   64-I * BLANKET                MEDICAL SERVICE SUPPLY  1500.00
                                                ===============================
BATCH TOTAL:                                   4  POs                  3050.00

E N D   O F   R E P O R T
```

Figure 2-12: CHS Summary report

2.6   Automated Fiscal Year Setup

The new Automated Fiscal Year setup assists sites with the yearly process. The option runs through closing current registers and printing DCRs, initializes new registers, saves CHS Facility global, saves CHS CHEF global, deletes the 10 year data from the ACHSF global, CAN setup, and Advice of Allowance setup.

Federal site FY setup is October 1 and Tribal sites will be based on their setup. The process will start once the user selects the CHS menu. A message will present to the user if the Annual Global save directory is not set to save the 10 year files. This allows the user to exit the process to set up the directory. The user can select no and continue with process. If the user proceeds without the directory setup, the user will need to run the CHS utility to delete FY documents from the Utility option #13.

The process will then proceed to delete the 10-year data. Next the CANs will be setup for the new FY and last the user is prompted for the Advice of Allowance setup. The Advice of Allowance can be bypassed and entered later using the ALU option.

New FY setup is complete.

> **Note**:   The ANNUAL GLOBAL save directory must be a secure
>   directory set up by the Site Manager or IT Manager at the site.

```
THE CHS SYSTEM HAS NOT BEEN INITIALIZED FOR THE CURRENT FISCAL YEAR

SETTING UP NEW FISCAL YEAR.  PLEASE WAIT........

                          ***ATTENTION***
The ANNUAL GLOBAL SAVE DIRECTORY is not set.  To complete automated setup,
including saving and deleting the 10 year files (ACHSF, ACHSCHEF), specify
the directory in the CHS Facility File.

Do you want to exit to complete the directory? Y//
```

Figure 2-13: Annual Global save directory not set message

```
Select VA FileMan <TEST ACCOUNT> Option: ENTER or Edit File Entries

INPUT TO WHAT FILE: RPMS SITE// CHS FACILITY     (7 entries)
EDIT WHICH FIELD: ALL// ANNUAL GLOBAL SAVE DIRECTORY
THEN EDIT FIELD:

Select CHS FACILITY NAME:   2020 DEMO HOSPITAL
ANNUAL GLOBAL SAVE DIRECTORY: H:\CHS10YR//
```

Figure 2-14: FileMan CHS Facility Annual Global save directory

```
THE CHS SYSTEM HAS NOT BEEN INITIALIZED FOR THE CURRENT FISCAL YEAR

SETTING UP NEW FISCAL YEAR.  PLEASE WAIT........

Closing Current Registers And Printing 'DCRs'.  Please Wait.....

The following REGISTERS have been CLOSED:

            FY        REG #
          2009        215
          2012         92
          2013         42
          2014         17
          2015         14
          2016          9
          2017          7
          2018          6
          2019          4
          2020          3
          2021          1


ENTER DEVICE TO PRINT DCR: HOME//   Virtual

  Your DCR will begin to print in a moment.
...SORRY, THIS MAY TAKE A FEW MOMENTS...

Initializing New Registers.  Please Wait...

FINISHED....
```

Figure 2-15: Close and Initialize New Registers

```
    Saving the CHS FACILITY file global, ^ACHSF(.
     This could take 'awhile'.

DOS File Being Created'
Please Standby - Copying Data to DOS File H:\RPMS\ACHSF.SAV.FY2012

    Remember that if you have to restore the global, the cross references
    on the entire file will not be there because XBGSAVE stops when the
    first subscript is not a numeric.  So, use FileMan to re-cross
    index the entire CHS FACILITY file, if you really have to restore the
    global.
```

Figure 2-16: Save CHS Facility global with Annual Global save directory

```
    Saving the CHS CHEF file global, ^ACHSCHEF(.

DOS File Being Created'
Please Standby - Copying Data to DOS File H:\RPMS\ACHSCHEF.SAV.FY2012
```

Figure 2-17: Save CHS CHEF global with Annual Global save directory

```
   OK.  Here we go with the deletion
   This could take awhile.....................................................
..........................................................................
8826 FY 2012 documents permanently deleted.

Deleting FY 2012 from the CHS DATA CONTROL FILE.
...SORRY, LET ME THINK ABOUT THAT A MOMENT...
```

Figure 2-18: Deleting FY 2012 documents

```
CAN's set up for New FY.
```

Figure 2-19: CAN setup for FY

```
We will set up the Advice of Allowance....
Enter Advice of Allowance for FISCAL YEAR: 2022

YTD allowance for 2022 is:             $ 0.00
   Unobligated Balance is:             $ 0.00


Enter new YTD Advice of Allowance: 100000

For Fiscal Year 2022 the new Allowance is   100,000.00


Are you sure this NEW ALLOWANCE is CORRECT? NO// y  YES

                   ******  ALLOWANCE UPDATED  ******

Your Initial Register Balances don't = your Advice of Allowance.

Do you want to update the Initial Register Balances? Y// ES
INITIAL REG-1: 0// 20000
INITIAL REG-2: 0// 20000
INITIAL REG-3: 0// 20000
INITIAL REG-4: 0// 10000
INITIAL REG-5: 0// 10000
INITIAL REG-6: 0// 10000
INITIAL REG-7: 0// 10000

A NEW FISCAL YEAR 2022 HAS BEEN SET UP.
```

Figure 2-20: Advice of Allowance setup

2.7   New UFMS Directory for Direct Transmission

A new UFMS Directory field has been added to the CHS Facility file for sites transmitting directly to UFMS. The directory is the path to store UFMS files.

Windows: **c:\usr\spool\chsdata\ufms**

AIX: **/usr/spool/chsdata/ufms**

```
Select VA FileMan Option: ENTER or Edit File Entries

INPUT TO WHAT FILE: CHS FACILITY//
EDIT WHICH FIELD: ALL// .06  UFMS DIRECTORY
THEN EDIT FIELD:

Select CHS FACILITY NAME:   2021 DEMO HOSPITAL (INST)
UFMS DIRECTORY:
```

Figure 2-21: UFMS Directory in CHS Facility file

2.8   CHS application banner display Preferred Name

The preferred name will display in the CHS application if a preferred name has been entered in Patient Registration. The application can also perform a lookup by preferred name. The preferred name will not display in reports or on the Purchase Orders. The display shows as **Demo, Patient – Preferred***.

```
   Select RCIS REFERRAL by Patient or by Referral Date or #: DEMO,PREFERRED
M  ** SENSITIVE **       TST 999345
Form # 64                                        REF TYPE     Order No.
Jul 23, 2021                   Outpatient Service    2       2-H01-00001
                                          HHS Order No:  HHSI2472022H0100001U
-------------------------------------------------------------------------------
            Patient                   |     Ordering Facility & Provider
Fac: 232101  IHS#: 999404             | 2020 DEMO HOSPITAL
DEMO,PATIENT - PREFERRED*             | 4700 LINCOLN RD NE
ALBUQUERQUE, NM  87110                | ALBUQUERQUE NM 87110
12-04-1977  M  084  001 242-23-35     | 232101
-------------------------------------------------------------------------------
Est. date-of-svc.: Jul 15, 2021       | PHYSCIANS PROFESSIONAL CORP
MEDICAL CONSULT                       | 550 W THOMAS RD #211B
PVT INS                               | PHOENIX, AZ  85013
Hosp Ord #:  ---                      | 1860178942-00 Open Market
                                      |
-------------------------------------------------------------------------------
Auth. From Jul 15, 2021 to Jul 25, 2021   ---  SCC: 25.4C
DCR Acct. = PHYSICIAN OUTPT               CAN/OBJ: J407K20 / 25.6T  TESTP29
 Estimated Charge: $300.00               Hosp Order No:  ---
    Initial Obligation         300.00
    Amount Canceled:             0.00  ( Items)
    Amount Of Supplements        0.00  ( )
                               --------
CURRENT OBLIGATION BALANCE      300.00       (IHS) (3rd PARTY)
```

Figure 2-22: Document display with Preferred Name

```
Select Document: DEMO,PREFERRED
  DEMO,PATIENT - PREFERRED*             M 12-04-1977  106120477P   TST 999404

   Choose from:
   1200001      000012-H01-00001(66910)OUTPATIENTOPEN
   1200002      000022-H01-00002(66911)OUTPATIENTOPEN
```

Figure 2-23: Preferred Name lookup

2.9   Social Security Redaction on Printed Purchase Order

The Social Security Number Fraud Prevention Act of 2017 restrictions states to not include the social security number of an individual on any document sent by mail. The SSN will be removed from the printed PRC purchase order that contains the SSN and is mailed by sites. The SSN will still be included in the export files sent to the NDW and the FI.

Acronym List

Acronym	Term Meaning
CHS	Contract Health Services
CHSMIS	Contract Health Services Management Information System
DUNS	Data Universal Numbering System
EFT	Electronic Funds Transfer
EOBR	Explanation of Bill Review
EPOV	Electronic Purchase Order Verification
FI	Fiscal Intermediary
ICD	International Classification of Diseases
IHS	Indian Health Service
PO	Purchase Order
PRC	Purchase Referred Care
PRCO	Purchase Referred Care Officer
SAM	System of Award Management
UFMS	Unified Financial Management System
UEI	Unique Entity Identifier

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