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
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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: 9999999999
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.
4. Select the option to Print or Browse.

**Figure 2-1: Vendor UEI Report**

<table>
<thead>
<tr>
<th>CHS VENDOR UEI REPORT</th>
<th>Page: 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Matched Vendors</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>RPMS VENDOR</td>
<td>UFMS VENDOR</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>SONORA QUEST LABORATORIES</td>
<td>SONORA QUEST LABORATORIES LLC</td>
</tr>
<tr>
<td>ARTISAN PROSTHETICS</td>
<td>ARTISAN PROSTHETICS LLC</td>
</tr>
<tr>
<td>BANNER DESERT MED CTR</td>
<td>BANNER HEALTH 341417</td>
</tr>
<tr>
<td>PONGRATZ ORTHO &amp; PROSTHETICS</td>
<td>PONGRATZ ORTHOTICS &amp; PROSTHE</td>
</tr>
<tr>
<td>Total Vendor UEI</td>
<td></td>
</tr>
<tr>
<td>Total Matched: 30</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 2-2: Vendor UEI Matched Report**
2.3 Electronic Purchase Order Verification from the FI

This option is for Areas and Sites with Direct transmission to 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.

<table>
<thead>
<tr>
<th>ACON</th>
<th>Area CHS Consolidate/Splitout Data From Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>DHRL</td>
<td>Print AO CHS DHR Data</td>
</tr>
<tr>
<td>EO8P</td>
<td>Area CHS Process EOBR DATA</td>
</tr>
<tr>
<td>VEPO</td>
<td>View FI EPOV file</td>
</tr>
<tr>
<td>AOPO</td>
<td>AO PO Transactions</td>
</tr>
<tr>
<td>PAR</td>
<td>Edit Area Office CHS Parameters</td>
</tr>
<tr>
<td>SVRP</td>
<td>AO Special Vendor Report</td>
</tr>
</tbody>
</table>

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

**Figure 2-5: Area VEPO menu option**

<table>
<thead>
<tr>
<th>CDPE</th>
<th>CHS data - prepare for export</th>
</tr>
</thead>
<tbody>
<tr>
<td>RETD</td>
<td>Re-Export CHS Transmission Data</td>
</tr>
<tr>
<td>XPT</td>
<td>Mark Patient For Export</td>
</tr>
<tr>
<td>XVEN</td>
<td>Mark Vendor For Export</td>
</tr>
<tr>
<td>CEEX</td>
<td>CHS Export Summary</td>
</tr>
<tr>
<td>EDID</td>
<td>Export Document View VEPO View FI EPOV file</td>
</tr>
</tbody>
</table>

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

**Figure 2-6: Site VEPO menu option**
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.
4. The detail view of the PO is displayed.
Figure 2-8: EDID menu option

<table>
<thead>
<tr>
<th>Select Document:</th>
<th>1-00010</th>
<th>07-29-21</th>
<th>OPEN</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form # 64</td>
<td>07-29-21</td>
<td>OPEN 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jul 29, 2021</td>
<td>Outpatient Service</td>
<td>2</td>
<td>1-H01-00010</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>HHS Order No: HHSI2472021H0100010U</td>
<td></td>
</tr>
<tr>
<td>Export: Jul 29, 2021@16:17</td>
<td>FILE: ACHS232101.20210729_161724</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IHS#: 99935 Ref #: 2321012100024</td>
<td>Fac: 232101</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TREE,BANANA - YELLOW*</td>
<td>Est. date-of-svc.: Jul 29, 2021</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-30-1955 F</td>
<td>MEDICAL EVAL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MCR=414124444A MCD=123456 PVT INS</td>
<td>Hosp Ord #: ---</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NAVAJO TRIBE, AZ NM AND UT</td>
<td>Estimated Charge: $350.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auth. From Jul 29, 2021 to Aug 08, 2021</td>
<td>LTD ARTHRITIS CENTER</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCC: 25.2L</td>
<td>3330 N. 2ND ST, #601</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DCR Acct. = OTHER</td>
<td>PHOENIX, AZ 85012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAN/OBJ: J400774 / 25.6R ---</td>
<td>1860432015 Open Market</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actual DOS: ---</td>
<td>DESTINATION: FI</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
**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)

<table>
<thead>
<tr>
<th>ITM#</th>
<th>EXPORT DATE</th>
<th>FILE NAME</th>
<th># RECORDS</th>
<th>EXPORT TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jul 29, 2021@16:17</td>
<td>ACHS232101.20210729_161724</td>
<td>31</td>
<td>Re-export UFMS</td>
</tr>
<tr>
<td>2</td>
<td>Jul 29, 2021@12:53</td>
<td>ACHS232101.20210729_125356</td>
<td>19</td>
<td>Re-export UFMS</td>
</tr>
</tbody>
</table>

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

BATCH DATE:  Jul 29, 2021@16:17
EXPORT:  Re-export UFMS
FILE NAME:  ACHS232101.20210729_161724

<table>
<thead>
<tr>
<th>P.O. NUMBER</th>
<th>DEST TYPE</th>
<th>PATIENT</th>
<th>VENDOR</th>
<th>EST COST</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-H01-00008</td>
<td>FI</td>
<td>TREE,ALMOND</td>
<td>PHYSICIAN GROUP OF ARIZ</td>
<td>500.00</td>
</tr>
<tr>
<td>1-H01-00009</td>
<td>FI</td>
<td>TREE,ASPEN</td>
<td>ARIZONA ALLERGY ASSOCIA</td>
<td>700.00</td>
</tr>
<tr>
<td>1-H01-00010</td>
<td>FI</td>
<td>TREE,BANANA</td>
<td>ARTHRITIS CENTER, LTD</td>
<td>350.00</td>
</tr>
<tr>
<td>1-H01-00011</td>
<td>FI</td>
<td>* BLANKET</td>
<td>MEDICAL SERVICE SUPPLY</td>
<td>1500.00</td>
</tr>
</tbody>
</table>

BATCH TOTAL: 4 POs 3050.00

END OF REPORT

**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:

<table>
<thead>
<tr>
<th>FY</th>
<th>REG #</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>215</td>
</tr>
<tr>
<td>2012</td>
<td>92</td>
</tr>
<tr>
<td>2013</td>
<td>42</td>
</tr>
<tr>
<td>2014</td>
<td>17</td>
</tr>
<tr>
<td>2015</td>
<td>14</td>
</tr>
<tr>
<td>2016</td>
<td>9</td>
</tr>
<tr>
<td>2017</td>
<td>7</td>
</tr>
<tr>
<td>2018</td>
<td>6</td>
</tr>
<tr>
<td>2019</td>
<td>4</td>
</tr>
<tr>
<td>2020</td>
<td>3</td>
</tr>
<tr>
<td>2021</td>
<td>1</td>
</tr>
</tbody>
</table>

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

Addendum to User Manual Patch 29 Changes September 2021
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
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**.

```
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     | PHYSICIANS PROFESSIONAL CORP
Dcr Acct. = PHYSICIAN OUTPT         | 550 W THOMAS RD #211B
Estimated Charge: $300.00           | PHOENIX, AZ 85013
Initial Obligation 300.00           | Hosp Order No: ---
Amount Canceled: 0.00 (Items)       | 1860178942-00 Open Market
Amount Of Supplements 0.00 ( )       |

CURRENT OBLIGATION BALANCE 300.00   (IHS) (3rd PARTY)
```

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
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

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

If you have any questions or comments regarding this distribution, please contact the IHS IT Service Desk.

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