Income Verification Match (IVM) Setup Checklist
Verification of Communications with ESR

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
External Dependency Verification(s)			
1. Station Activation Date set. (Allow 45-60 days for prep work).			
2. Verification of FORUM institution updates.			
3. Verification of institution updates are made in Standard Data Service (SDS) tables and are active. Table: SDSADM.STD_INSTITUTION			
4. Verification of Local VIE setup to support ESR Messaging traffic.			
5. Verification of National VIE setup (AITC) to support ESR traffic from facility.			
IVM Package Setup			
6. Verify Registration (DG) package is fully patched in patch sequence order. Verify that any patches containing pre or post installation instructions have been executed if appropriate to site situation.			
7. Verify Enrollment Application System (EAS) package is fully patched in patch sequence order. Verify that any patches containing pre or post installation instructions have been executed if appropriate to site situation.			
8. Verify Income Verification (IVM) package is fully patched in patch sequence order. Verify that any patches containing pre or post installation instructions have been executed if appropriate to site situation.			
9. Using option IVM Parameter Enter/Edit [IVM SYS PAR ENTER/EDIT] set up in the package parameters. It may be helpful to use a copy of the parameter from another facility as a guide or refer to the IVM V2.0 User Manual.			
10. Assign Staff IVM menu options and associated security keys as appropriate. See top level menu IVM MAIN MENU and submenus.			
A. IVM SYS – To lock the IVM SYS MGR MENU.			
B. IVM UPLOAD – To assist in controlling who can upload or reject data from the Health Eligibility Center (from ESR).			
11. Enroll end users in the following IVM mail groups as needed.			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
A. IVM MESSAGES – This mail group will receive messages pertaining to erroneous data transmitted to the ESR and for data to be uploaded from ESR.			
B. IVM ADDR UPDT REPORT – This mail group will receive the IVM Address Updates Pending. (New with patch IVM*2*93).			
C. IVM TRANSMISSIONS – This mail group will receive IVM HL7 transmissions.			
D. DGEN ELIGIBILITY ALERT – This mail group is used to notify the local site of problems discovered during the upload of enrollment/eligibility data received from ESR. It is also used by HEC to communicate directly with the local site about a patient's enrollment and eligibility.			
E. DGMT MT/CT UPLOAD ALERTS – This mail group is used to notify the local site of detailed changes about the patient's Means and Copay Test status changes including hardships.			
Facility Messaging Protocol Activation			
12. Verify the DENTVHLAAC HL7 Logical Link is present in File #870 and that the IP address/port combination points to the local VIE Server.			
13. Ensure the LLESROUT link is in a shutdown state. If not, use standard HL7 options to shutdown the logical link.			
14. Enable ESR messaging by running the following line of code:			
A. F MODE=1 D TAG^EAS1071A(.ZZRET,MODE) W !,MODE,?15,ZZRET			
B. Result should be:			
C. 1 ESR messaging enabled.			
15. Follow steps delineated in patch EAS*1*95 to change the port of the LLESROUT link to point to port 8911 on the local VIE server.			
16. Set ESR as the System of Record using the following line of code:			
A. F MODE=2 D TAG^EAS1071A(,ZZRET,MODE)			
B. Result should be:			
C. 2 ESR set as SOR			
17. Determine if patch EAS*1*96 has been released and installed in the facility's database. This patch will disable messaging to the HEC Legacy system. If the patch has been released and installed, no further action is required. If the patch is released, it must be installed. If the patch has not been released, no action is required.			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
18. Use standard HL7 options to restart the LLESROUT link.			
19. Verify connectivity of the LLESROUT link with the local VIE server.			
20. IRM staff should schedule the IVM BACKGROUND JOB run once a day (1D) during non-peak hours (generally after midnight). This background job will transmit data to the ESR who have had trigger events occur since the last time the option ran. This option should be scheduled to run daily after midnight and at least two hours prior to normal business hours.			