CT Onboarding: Starting All Over Again After a Migration

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Keeping Connecticut Healthy

Our Presentation

- Ground Zero
- Discovery/Planning
- Standard Operating Procedures
- Communication
- Registration Phase
- Testing Phase
- Production Approval
- Managing the Queue
- Monitoring
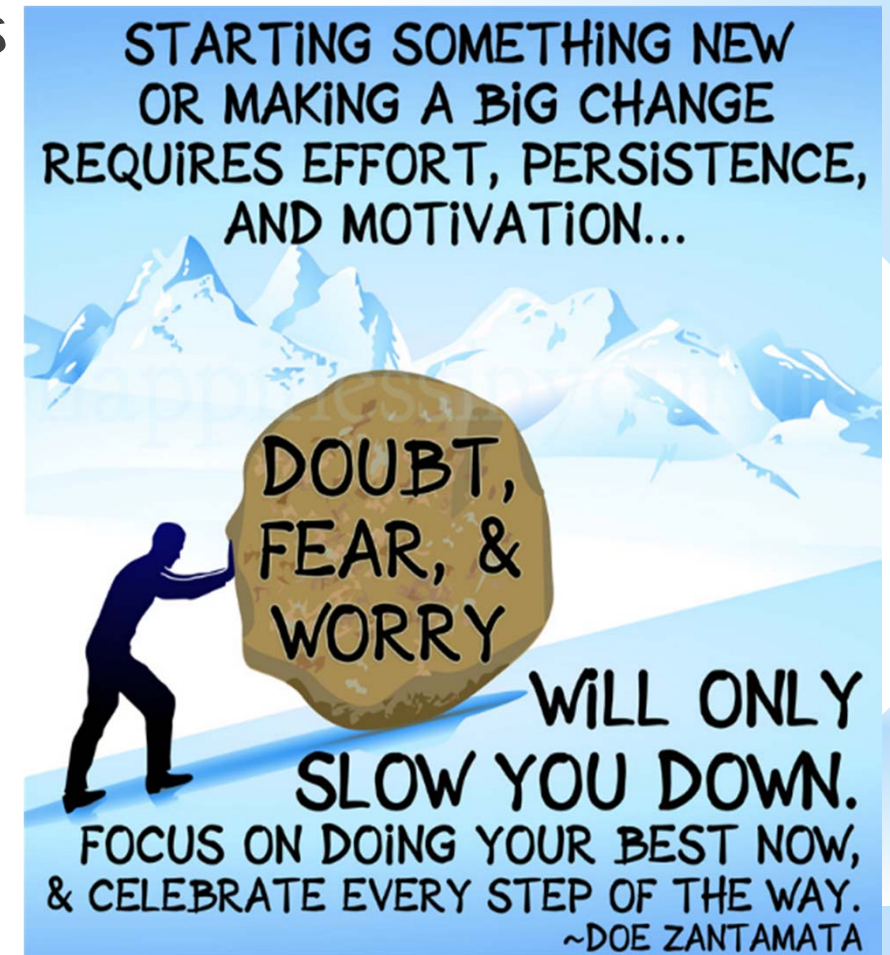- Challenges
- Support
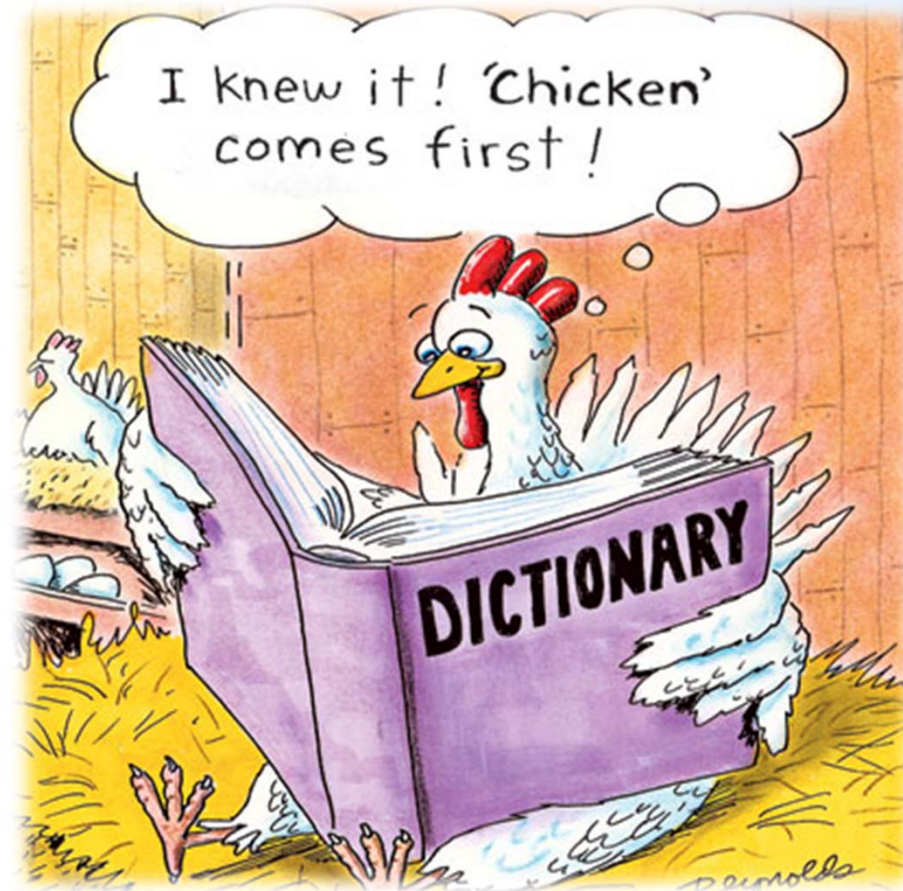
Ground Zero...

CT WiZ went live September 17, 2018!

- Migrated: 873,111 patients and 14,400,475 records
- Re-onboarding: ALL providers from scratch!
- Replaced: 'CIRTS' with 'WebIZ'
- 716: CT Vaccine Program (CVP) Clinics loaded

Progress 11 months later...

Phase 1 Goal by June 30, 2020 (20%)

- 123: Onboarding Queue (17%)
- 30: Testing Phase
- 9:   Production
- 54: Usernames ordering CVP vaccines in CT WiZ

STARTING SOMETHING NEW OR MAKING A BIG CHANGE REQUIRES EFFORT, PERSISTENCE, AND MOTIVATION...

DOUBT, FEAR, & WORRY WILL ONLY SLOW YOU DOWN. FOCUS ON DOING YOUR BEST NOW, & CELEBRATE EVERY STEP OF THE WAY.
~DOE ZANTAMATA

Onboarding Prep

In November 2018, AIRA released the *Onboarding Consensus-Based Recommendations* guide to improve and standardize the onboarding process.

CT DPH shares the following priorities:

- Streamline onboarding activities
- Apply support tools and technologies
- Maximize limited staffing resources
- Increase number of interfaces in production

Workflow

Following the AIRA Onboarding Consensus Based Recommendations:
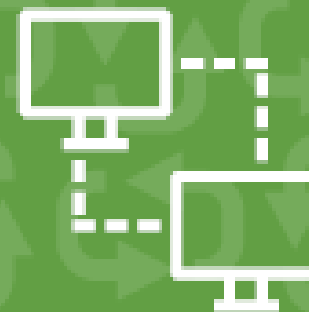

STEP 1: DISCOVERY & PLANNING

STEP 2: DEVELOPMENT AND TESTING

STEP 3: PRODUCTION APPROVAL

STEP 4: ONGOING MONITORING

SPECIAL: QUERY/ RESPONSE

Discovery/Planning

Assessed Each Onboarding Phase, Created Standard Documentation, and Posted step-by-step process on our Website:

- 1) VXU Reporting
- 2) Query/Response

Assessed Implementation Needs:

- Communication!
- Establishing Expectations/Roles & Responsibilities
- Managing Queue/Leveraging Onboarding Tools
- Developing Data Quality
- Training Materials and Help Desk on our website

STEP 1:
DISCOVERY
& PLANNING

Standard Operating Procedures (SOPs)

- Document and detail each step of the onboarding process
- Guide the training of onboarding staff and contractors
- Ensure all staff can uniformly facilitate the entire onboarding process

Communication

Kick-off Call and Go-Live Call:
- What to expect while onboarding
- How to receive a passing grade
- Support Resources
- Next Steps After Go-Live

Promotion/Recruitment:
- Roles and Responsibilities
  - (before, during, after onboarding)
- Webinars, Newsletters, Advisory Meetings, Website

Registration Phase

- Getting Started – Transport and NIST
- Onboarding Readiness Checklist
- CT WiZ HL7 Application Form
- Help Desk

1. Getting Started

Before you start your application, review the following documents.

Onboarding Terms & Acronyms describes common terms that will be used throughout the onboarding process.

The **HL7 Instructions Document** walks you through the entire onboarding process. It describes:
- The onboarding application and NIST reports
- Waiting for testing to begin
- Meetings throughout the process
- The configuration and connection of your EHR to CT WiZ
- The testing and validation of HL7 messages
- Data quality review of HL7 messages
- Going Live in Production

The **Transport Layer Protocol Recommendation Formal Specification** provides guidance on connectivity and transport. CT WiZ only accepts submission through SOAP Web Services using the CDC WSDL.

The **CT WiZ Local Implementation Guide for HL7 2.5.1 Immunization Messaging Release 1.5** and the following documents define what fields and segments the Immunization Information System will and will not accept in an HL7 message.
- **CT WiZ HL7 Segments VXU**
- **Quick Reference to Fix VXU Errors**
- **CVP Patient Eligibility Screening**
- **Vaccines Supplied by CVP** (Jan 2019)

The **NIST Cases Validation Instructions** provides guidance on performing the necessary testing and validation of messages in the NIST Tool in order to demonstrate that your EHR System complies with the requirements of HL7 Version 2.5.1 for Immunization Messaging, Release 1.5.

2. Complete the Application

Ready to apply? Remember, you must successfully complete the NIST tests and save the reports.

Review the **Onboarding Readiness Checklist** to ensure you are ready to apply.

Complete the **CT WiZ HL7 Application Form** . Review the 1st tab and complete the other 4 tabs in the spreadsheet.

Email the Application Form and the NIST Reports to **Helpdesk.dph@ct.gov**. In the email's subject line, please type "Intent to submit data electronically to CT WiZ".

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Testing Phase

Formalized Kick-off Call and Presentation

- Defined Roles and Responsibilities of all stakeholders (Before, During and After Onboarding)
- Legacy Data process

4. Testing Phase

When you are ready, "live" patient immunization data (Production) will be submitted in real-time from your EHR system to the CT WiZ QA (Test) environment to test the interface connection and message data quality. Acknowledgement (ACK) message will be returned to your EHR system in response.

The organization (or their designee) should monitor the ACKs and take actions to correct submissions as needed until errors no longer occur.

Phase 1: Confirm that CT WiZ can accept a test message from your EHR System.
Phase 2: Validate messages from your EHR to confirm that required fields are populated with proper codes.
Phase 3: Assess data quality of message content to ensure accurate patient data has been sent.

There must be 2 weeks of error and warning free messages before moving into the Production environment.

STEP 2: DEVELOPMENT AND TESTING

Production Approval

Formalized Go-Live Kick Off Call & Checklist

- Roles and Responsibilities Review
- Production Support Contacts

STEP 3: PRODUCTION APPROVAL

5. In Production

When the EHR interface goes into Production, and the clinic is actively exchanging data with CT WiZ, the clinic (or their designee) must continue to review the ACK messages to ensure ongoing submission and data quality. Failed submissions or error messages should be corrected and resubmitted to CT WiZ.

Review the **Roles & Responsibilities** for who should be handling which tasks.

Follow and complete the **Onboarding Go-Live Checklist** in order to successfully enter and remain in the CT WiZ Production environment for HL7 messaging.

- Integrated 'Traceability Spreadsheet' and 'Track-It' application to manage statuses and phases: Registration, Testing and Implementation

Monitoring

- 2-week probationary monitoring period in Production
- Expectation for provider self-monitoring using CT WiZ reports
- SOPs for Production and Data at Rest:
  - Interface performance (counts and errors)
  - Review of prioritized data quality elements

STEP 4: ONGOING MONITORING

hl7_facility_d	hl7_fa	vendo	Softwa	HL7_A	severi	Segme	field	Field	iz_usa	Error_Code	constraints	user_message	Total	MRN_	Action	comments	Start_Per	End_Per
CT0040	WHEELER	NextGen	NextGen	AE	W	PID	PID.11.7	PatientA	RE	Required observation mis	The first repetition in an incon	PID-11 (PatientAddress[1]): Has a conditionally required element [AddressType]. Expectation: value in XAD-7 (Address Type) is required when XAD is populated.	174	3E+07	Vendor/Clinics need	Needs to be in correct format and type of address always should be sending, CT WiZ will updated the address according with the type of address with below values: BR=Loaded as the Patient's Physical address C=Loaded as the Patient's Mailing address H=Loaded as the Patient's Physical address L=Loaded as the Patient's Mailing address M=Loaded as the Patient's Mailing address P=Loaded as the Patient's Physical address BDL=Birth Delivery Location - City and State portions will be loaded into the Birth City and Birth State fields N=Birth (nee) - City and State portions will be loaded into the Birth City and Birth State fields	4/22/2019	5/15/2019
CT0040	WHEELER	NextGen	NextGen	AE	W	NK1	NK1.25.1	Religion	X	Required observation mis	WebIZ will not load this field i	NK1-25 (Religion): Has a conditionall	61	3E+07	Leave this field blank		4/22/2019	5/15/2019
CT0040	WHEELER	NextGen	NextGen	AE	E	OBX	OBX.5.	Observat	R	Table value not found	This is the observation value a	OBX-5 (ObservationValue): Unrecogni	55	3E+07	Vendor/Clinics need	This field is required when reporting administered immunizations. CT WiZ only will allow the below values for the vaccine funding source HL7 Code PHC70^Private	4/22/2019	5/15/2019

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CT WIZ HL7 ONBOARDING DQA FEEDBACK

Generation Date:

Start Date of Generation:
End Date of Generation:

Clinic Name:

EHR Clinic Status
General Comments

Total Messages Received: — Please verify that the counts match with the total of messages that your clinic sent in the selected period.
Total Patients: — Please verify that the counts match with the total of patients that your clinic sent in the selected period.
Total Immunizations: — Please verify that the counts match with the total of immunizations that your clinic sent in the selected period.

Category	Description	Status	MRN Examples	DPH Comments	Vendor/Clinic Comments
Completeness	Measures how many required and expected fields have been received in CT WiZ. **Completeness of the demographics** **- Required "R" Fields:** Patients with MRN, Patients with First Name, Patients with Last Name, Patients with DOB, Patients with Gender, Patients with Address 1, Patients with City, Patients with Postal Code, Patients with State				
Duplicate shots	Identifies the patients that have multiple vaccinations within the specified number of days within the same vaccine group that were sending by the EHR system.				
Lot Number with issues	Identifies patients that have one or more invalid lot numbers (same lot number for different brands).				
Revision of the VFC	Identifies patients that have: - One or more invalid vaccine funding source (invalid code or it is missing) - Vaccine funding program eligibility and Vaccine Funding source are populated. - Vaccine funding program eligibility and Vaccine Funding source are populated with the codes that CT WiZ allows to use. - The "V00" Vaccine funding program eligibility code is not used for the patients with less than 19 years old. - Vaccine funding program eligibility Code is not the same for all patients that were sent it.				
Shots before DOB	Identifies patients who have a vaccination before their DOB				

Timeliness	Measures the number of days between the date a record was created in CT WiZ and the administered given date of the vaccination indicated.
Historical Immunizations	Identifies that the EHR system is sending the historical immunizations that were created in the daily basis in the EHR System, for example if a patient arrives at your clinic, where he is given a vaccine that is entered into your system with all the information as current immunization, but also your staff identifies that other vaccines were applied to the patient in another clinic and your staff performs the creation of these vaccines in your EHR system, these vaccines should be sent to our system as historical vaccines.
Immunizations with updates and/or deletes	Identifies the immunizations that were updated or deleted in the EHR System, this information should be sent to CT WiZ to have both systems in sync, to determine the type of the update, the EHR system should use the "Action Code" element, located in the RXA segment position number 21. A=Add U=Update D=Delete
Completion Status of the immunization	Identifies how the immunization was administered to the patient, this information should be sent to CT WiZ to have both systems in sync, to determine the type of the administration, the EHR system should use the "Completion Status" element, located in the RXA segment position number 20. Acceptable values in the incoming message are: - CP for (Complete) Vaccine - PA for (Partially Administered) Vaccine - NA for (Not Administered) Vaccine - RE for Refused Vaccine
Misc.	Other clinic level issues.

Challenges

Legacy Loads

- Load into QA environment after working hours
- Run DQA report/Manual Clean-Up

Vendors charging for interfaces

- IIS following national standards for onboarding, promote benefits of IIS, option for manually reporting doses administered

Vendors not prioritizing onboarding

- Contact provider (the customer) with defined tracking process
- Conducted EHR Survey (targeting rollout by Vendor)
- Increase outreach/promotion/recruitment (statewide)

Training & Technical Support

Quick Links:

Training Materials

Technical Support

CT WiZ Training

This page consists of training materials for CT WiZ users. Some of these trainings are only for full access users. A full access user belongs to a clinic that orders CVP vaccines and administer doses in CT WiZ. These trainings are marked with an asterisk (*).

Quick Links CT WiZ Technical Support   HL7 Interface   For Healthcare Providers

CT WiZ

- What is CT WiZ and what does it do?
- What happens when I log in for the first time?
- How do I reset my password?
- How do I navigate in CT WiZ?
- How do I update the VIS?
- How do I change information about my clinic (update staff, email, clinic)?

Patient Record

- How do I print an official immunization record?
- How do I search for, view, and modify a patient's record?
- How do I change a patient's name and/or date of birth?
- How do I add a patient to my clinic?
- How do I remove a patient from my clinic?
- How do I correct data entry errors?
- How do I report/correct duplicate patient records?

CT WiZ Technical Support

How can we help you?

CT WiZ System

- I can't log into CT WiZ (existing user)
- I need to reset my password
- CT WiZ is down
- CT WiZ is running slow
- I'm getting a system error
- I'm getting unstable behavior

Data/ Patient Records

- I have data errors I need to correct
- How do I report/correct duplicate patient records?
- How do I run reports related to Patients/Clinic/Data Quality?

HL7 Interface

- I'm having issues with my HL7 interface

Vaccine Inventory and Ordering

- I'm unable to place my CVP vaccine order

Contact

Connecticut

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About CT WiZ Website:

https://portal.ct.gov/DPH/Immunizations/ALL-ABOUT-CT-WiZ

Quick Links

Healthcare Provider Login

Training Materials

Technical Support

EHR Data Exchange