

IIS Staff:

During	After
• Provide general coordination/project management, communication, and customer service. • Provide specific contacts with technical and programmatic expertise. • Provide an appropriate testing/validation platform. • Communicate details about the onboarding process and thresholds for success. • Make onboarding documentation easily accessible/readily available and ensure that it is up to date at all times. • Provide timely feedback on message conformance/performance and data quality. • Assist with issue identification and troubleshooting. • Manage expectations about process, milestones, and timelines. • Inform stakeholders of any system updates/changes.	• Provide appropriate training for providers and communicate ongoing expectations for a production interface. • Provide continued communication and coordination. • Monitor data feeds for errors. • Notify providers of any changes to CT WiZ or outages that may impact existing interfaces. • Continue to post updated documentation as requirements and standards evolve.

EHR Vendor:

During	After
• Provide project management and technical expertise (testing and development) on behalf of the EHR team. • Be an active participant in all elements of the onboarding process and attend all meetings/conference calls. • Ensure the EHR system aligns with HL7 transport and messaging standards. • Work with IIS to identify, troubleshoot, and quickly resolve any issues with the interface or submitted messages. • Help IIS manage expectations about process, milestones, and timelines with the provider. • Assist providers with proper configuration of their EHR.	• Assist providers with proper configuration of their EHR. • Train providers on how to monitor their interface (performance and ACKs) and resolve issues or seek assistance as needed. • Facilitate transition from the onboarding/implementation team to the long-term support team. • Assist with maintaining the connection and monitoring the interface for performance and errors. • Provide technical support to the provider and resolve any technical issues. • Maintain conformance with HL7 transport and messaging standards. • Notify providers (and possibly IIS) of any changes to the EHR or outages that may impact existing interfaces.

Provider:

During	After
• Complete all necessary enrollment forms/paperwork and engage the EHR vendor to get onboarding resources assigned. • Identify a primary sponsor to be an active participant in all elements of the onboarding process and attend meetings/conference calls as appropriate. • Provide production or production-quality data for testing and validation. • Coordinate appropriate staff for end user testing and troubleshooting. • Identify and resolve issues caused by improper workflows or poor data entry that adversely impact data quality. • Work with EHR vendor or provider technical staff to resolve issues with the interface or submitted messages.	• Verify initial setup is correct and data from the EHR is successfully populating the production IIS. • Monitor ACK interface and appropriate EHR/IIS reports to identify changes in volume or quality of messages or anything else that raises red flags about the interface. • Immediately report issues to the IIS and EHR contacts for assistance in troubleshooting. • Correct data entry errors and establish appropriate policies/procedures to address issues with workflow and data quality; train staff as needed. • Communicate with IIS about any system changes/updates or outages that may impact existing interfaces. • Provide updated contact information for staff changes at either the provider or EHR vendor. • Notify the IIS of any mergers, acquisitions, or closures. • Perform a complete inventory reconciliation each time a vaccine order is submitted through CT WiZ. • Review the Patient Reminder/Recall Report under the Patient Management section in CT WiZ to: ○ Mange patients that may need to be inactivated from the clinic or jurisdiction (CT). ○ Identify patients who are due or overdue for immunizations. • Review the Invalid Doses Report under the Coverage Statistics section in CT WiZ and correct any data entry errors in both the EHR and CT WiZ. • Review the Patients with Possible Duplicate Vaccinations Report under Data Quality-User section in CT WiZ and correct the information in the patient's record in CT WiZ. • If the EHR does not specifically prevent users from recording a vaccination date that precedes the date of birth, review the Shots before Date of Birth Report under the Data Quality-User section in CT WiZ and correct the information in both the EHR and CT WiZ. • Keep vaccinating!