

WYIR ONBOARDING GUIDE

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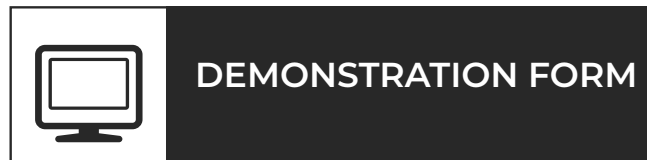
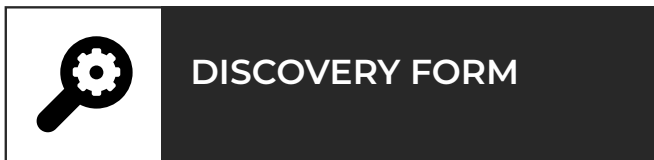
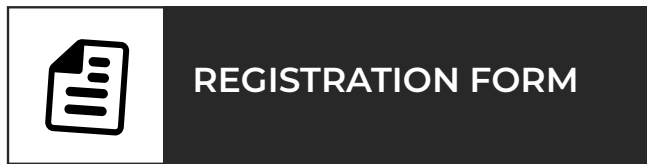
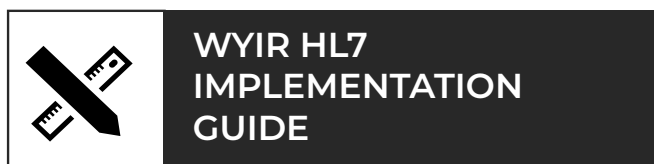


INTRODUCTION

Onboarding is the term used to describe the process that establishes an interface connection between a healthcare facility's electronic medical record (EMR) system and the Wyoming Immunization Registry, otherwise known as the WylR. An established interface automatically transmits immunization data to the WylR when vaccination events are recorded in the EMR. Interfaces can be unidirectional or bidirectional. Unidirectional connections report vaccination events to the WylR only. Bidirectional connections report vaccination events to the WylR, and return patient histories and vaccination forecasts to the facility's EMR. A unidirectional interface that does not report immunizations to the registry, but returns patient information to the facility's EMR upon request is referred to as a "query only" connection, additional information about this connection type can be found on page 10.

Onboarding begins when the facility expresses intent to initiate an interface with the WylR. Onboarding activities end after the interface has transitioned to the WylR production environment. Each step of the onboarding process will be discussed in detail following this section. The onboarding process will take several weeks up to several months to complete, dependent on the challenges faced and level of facility staff engagement. It is the expectation that the facility staff remain actively engaged throughout the entire process. If facility staff is non-responsive, does not act in a timely manner, or does not complete the necessary steps to progress, it is likely that the onboarding project will cease and the facility will be returned to the waitlist. Please see the registration section for details about the onboarding waitlist.

DOCUMENTATION



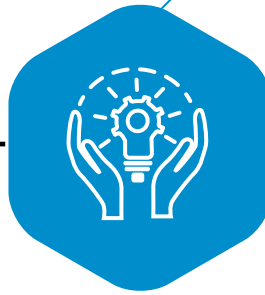
This document includes information from the publicly-available Onboarding Consensus-Based Recommendations — November 2018 guide by the American Immunization Registry Association (AIRA).

PROCESS OVERVIEW

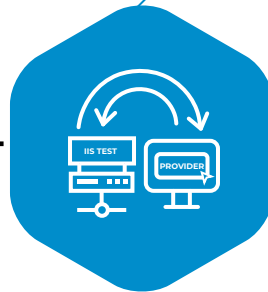
**PHASE 1:
REGISTRATION TO ONBOARD**



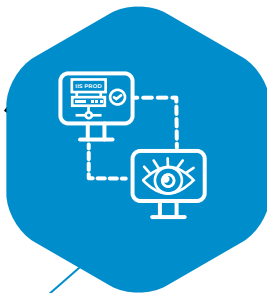
**PHASE 2:
DISCOVERY & KICK OFF**



**PHASE 3:
TESTING & DATA VALIDATION**

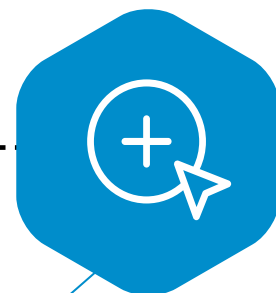


**PHASE 4:
APPROVAL TO PRODUCTION
& DATA MONITORING**



OTHER SCENARIOS:

- ADDING FACILITIES TO A LIVE INTERFACE
- QUERY ONLY INTERFACES





PHASE 1: REGISTRATION TO ONBOARD

OVERVIEW

For facilities that wish to establish a connection to the WylR, the first step is to register their intent to do so. Registration to onboard can be done on our [website](#). Once WylR staff is made aware of a facility's intent to onboard, the facility will be added to the waitlist. Due to limited state resources, high demand for connectivity, and the variability among onboarding projects, there is likely to be a brief waiting period before onboarding begins. Once a facility is invited to begin onboarding, it is the expectation they they maintain active engagement throughout the process. If facility staff is unable to provide active engagement at that time, they should delay onboarding until the resources or time is available. Failure to maintain engagement throughout the process is likely to result in demotion to the waitlist.



ESTABLISHING THE ONBOARDING TEAM



WYIR STAFF

From the WylR, the Interoperability Specialist will assist the team with all steps of the process and act as the main point of contact. Other representatives from the WylR team will assist with various parts of the process.



EMR VENDOR

The facility's EMR system should also be represented throughout onboarding, and be available to assist the team with establishing connectivity and resolving any issues that arise. The EMR should also provide technical assistance and training directly to facility staff.



FACILITY

Finally, *the facility should be appropriately represented. This is likely to include multiple staff members.* First, the Responsible Authority (RA) for the organization will be considered a contact for the interface, and should be present for part of the onboarding process. The RA is defined as the individual that signed the WylR Information Sharing Agreement. They are the only

member of the onboarding team that will *not* be required to be present throughout the entire onboarding process, but we do ask they are present for the kick off call. Kick off call details are found in the next section. If the facility/organization has IT or technical staff, they should be part of the onboarding team in support of the connection. Additionally, clinical staff representation is required. Onboarding is often assumed to be a job for technical staff, however, immunization data is produced by clinical staff and the interface has the potential to impact their daily work. For example, during the EMR demonstration, facility staff will be asked to walk through their vaccine administration workflow and vaccine inventory practices. It is also a requirement that facility staff fix any messaging errors that occur throughout the life of the connection, which may require clinical knowledge of the patient encounter. The best onboarding teams include both the technical perspective and the clinical perspective. For those facilities enrolled in a Public Vaccine Program (PVP), at least one of the Vaccine Coordinators will be required to be part of the onboarding team. It is the expectation that all members of the onboarding team are present for calls/meetings, and remain actively engaged in the process, with the exception of the RA.

If the onboarding entity is a large organization that contains several individual facilities, each facility site should be represented by at least one team member. It does not suffice to have one organizational representative, as each facility will be expected to take responsibility for the data they produce and any messaging errors.



PHASE 2: DISCOVERY & KICK OFF

OVERVIEW

Once WylR staff is prepared to begin onboarding work with a facility, a kick off call will be scheduled. This call will be scheduled for an hour. The kick-off call gives the different partners of the onboarding team an opportunity to be introduced and familiarize themselves with roles and responsibilities. The onboarding process will be reviewed, and details will be discussed. Facility staff should come prepared with any questions they have. The WylR team will provide all necessary materials at this time, including the Discovery Form. The Discovery Form is used to convey and collect important information that can be referenced throughout the onboarding process. Accurate and complete answers can help prepare the team for onboarding and expedite the process. A portion of the form will be completed during the kick off call, and the remainder will need to be completed by facility staff and then returned to WylR staff. The Discovery Form must be completed in full in order to continue the onboarding process. The form can be located on our website, and a link is provided in the documentation section of this document. Finally, connectivity details and credentials will be shared between WylR staff and the EMR vendor in order to begin building the interface.

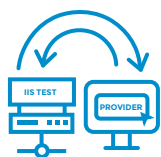
EMR DEMONSTRATION

Once the Discovery Form has been received by WylR staff, an EMR demonstration will be scheduled. This call will be scheduled utilizing a web platform, such as Google Hangouts, in order to give facility staff the ability to share their computer screen with the remainder of the team. The expectation is that facility staff shares a view of their EMR system, and demonstrates a variety of tasks and data fields at the instruction of WylR staff. Facility staff should come prepared to demonstrate their vaccine administration workflow, from the time the patient walks in, to the time they leave. This demonstration phase creates a common understanding between the facility and WylR staff of how to best utilize the EMR system and interface. This step is critical to minimizing the potential for problems, and educating WylR staff to better assist with troubleshooting.



IMPORTANT NOTE:

For facilities that are moving to a brand new EMR system, the system must be live and fully accessible to staff in order to schedule the demonstration. If the “go-live” date for the EMR system is in the future, the facility will be required to wait until after that date to proceed with onboarding.



PHASE 3: TESTING & DATA VALIDATION

OVERVIEW

Once the EMR demonstration is complete, connectivity has been established, and any potential findings have been resolved, the facility may proceed to the testing phase. The initial goal of the testing phase is to ensure that messages are sent and received appropriately, with no fatal errors. This may require the EMR vendor to make adjustments to message structure, or collaboration between team members to ensure connectivity details are successfully aligned. Brief meetings are occasionally necessary during this phase in order to troubleshoot issues.

```
3 require File.expand_path("../test/runner", __FILE__)
4 # Prevent database truncation if the environment is test
5 abort("The Rails environment is running in production mode!")
6 require 'spec_helper'
7 require 'rspec/raails'
```

When messages are being sent and received successfully, the goal then becomes data validation. Incoming data to the WyIR is always evaluated for:



COMPLETENESS



ACCURACY



VALIDITY

If messages fail to meet standards, they can result in an error or a warning. Additional information about data standards can be found in the WyIR Data Entry Requirements for Interface Messaging guide or the implementation guide, both found on [our website](#).

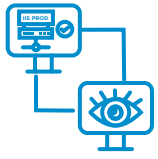
```
26 # run twice. It
27 # end with _spec.rb. The
28 # action on the command line
29 No results found for 'mongoid'
```


TESTING PHASE GRADUATION CHECKLIST

In order to graduate from the testing phase, the facility must meet the following conditions:

- *10 business days/2 weeks of data with no critical errors or failures.*
- *Complete a one-day data comparison/chart audit. WylR staff will send facility staff a report that contains one full day of the immunization data that was submitted to the WylR. Facility staff will then need to run a similar report in the EMR system and compare the data for any discrepancies. If this type of report does not exist in the EMR, facility staff will need to manually ensure that all patients and vaccinations administered on that day were accounted for in the WylR. This process ensures that 100% of immunization data is being accurately received by the WylR. If multiple facilities are onboarding at the same time, separate reports can be provided to each facility, or one large comprehensive report for the entire organization, dependent on the facility's preference. This audit may be repeated dependent on results.*
- *Incoming data must include messages from all facilities, if more than one is being onboarded.*
- *Data must be real, live patient data in order for the facility to graduate to the production environment. Mock data or test cases will not be accepted as a true test of the interface. Use of test patients is strictly prohibited. If the facility or vendor feels the need to utilize a test scenario, they MUST obtain approval from WylR staff prior to doing so.*
- *Provide an appropriate recipient for ongoing error reports. This staff member must prove their ability to complete error correction. If this person leaves the facility at any point in the future, they must be replaced in a timely manner and new contact information should be provided to WylR staff.*

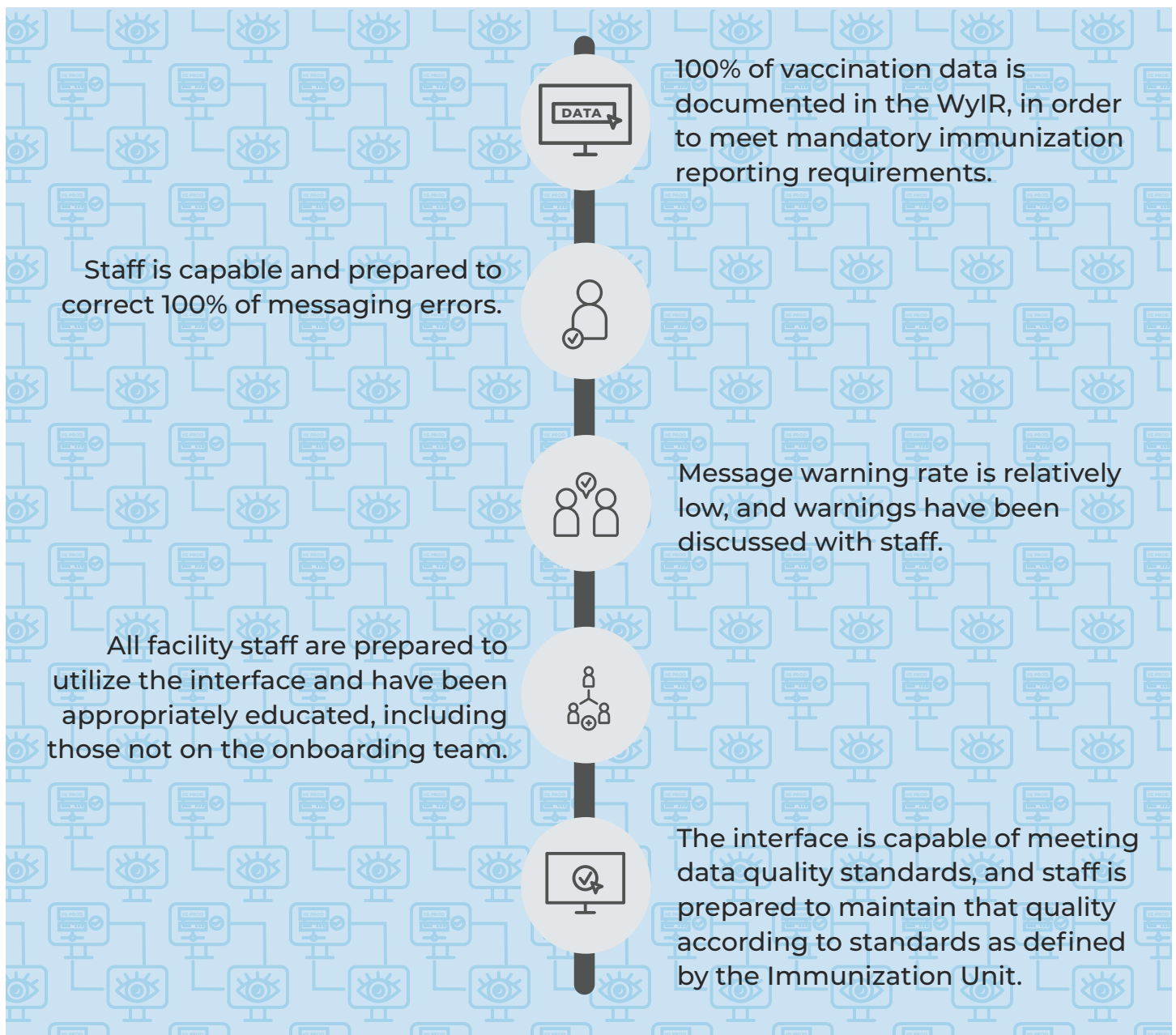
It is the expectation that facility staff remain engaged throughout the testing phase, and take necessary action to graduate to production. It is also facility staff's responsibility to dictate any work that needs to be done by their EMR vendor, and ensure that work is completed in a timely fashion. ***If progress is not being made to meet the above conditions, the interface will be considered for demotion to the waitlist.***



PHASE 4: APPROVAL TO PRODUCTION & DATA MONITORING

OVERVIEW

Ultimately, WylR staff must feel confident that a facility's connection will be successful in the production environment in order to be approved for the final transition into production. The purpose of the interface is to better serve the facility and their patients; an interface that does not meet the necessary conditions will not serve that purpose and will not be approved. Success is defined by several factors:



DATA MONITORING

Once WylR staff approves the transition into production, the entire onboarding team will be alerted. Collaboration between team members may be necessary to complete this work; brief meetings are occasionally held. When the interface is finally considered live in production, the facility moves into the final phase: Data Monitoring.

Data monitoring will be conducted by WylR staff throughout the life of the connection. The expectation is that the facility maintains the interface and their data quality. This means that the interface still meets all of the conditions that were required for approval into production, and aligns with data quality standards as defined by the Immunization Unit. Facility staff that was included in the onboarding team will be listed as contacts for the interface, and can expect to receive monthly error reports as well as any necessary communication about their interface. It is the expectation that the facility keep their interface contacts current, and alert WylR staff of any updates. Audits may be conducted on the data at rest in the WylR, checking for validity, accuracy, and completeness. In the event that WylR staff identifies problems with interface functionality, data quality, or error correction, notice will be given to the facility's interface contacts and the facility's Responsible Authority (RA). It is the expectation that facility staff take appropriate, immediate action to address any issues. Failure to maintain the interface and data quality may result in the interface being evaluated for disconnection. All possible efforts will be made to rectify an interface prior to considering disconnection, however, in the event that a connection is considered for disconnection, a disconnect notice will be sent to interface contacts and the RA.





SPECIAL SCENARIOS

ADDING FACILITIES TO A LIVE INTERFACE

It is the norm that several affiliated facilities onboard as a larger organization. In that scenario, steps have to be taken in order to allow messages to flow from each individual facility within the larger organization. In the event that an organization has an established, live interface with the WyIR, but requests to add additional facilities, those facilities will be required to complete the onboarding process before joining the remainder of the organization in the production environment.

QUERY ONLY INTERFACES

A query only interface is one that does not report vaccination events to the WyIR, but does provide patient histories and vaccination forecasts to another system. This type of connection is often used in facilities that can utilize the data to improve patient care, but do not necessarily administer vaccines. For example, long term care facilities, rehabilitation centers, or schools. Occasionally a healthcare facility that immunizes will also opt for a query only connection, however, in that scenario the facility would still be expected to meet mandatory immunization reporting requirements by directly entering vaccination events in the WyIR via user login.

While a query only interface will still require facility staff, EMR vendor, and WyIR staff to work together to establish connectivity, the onboarding process is abbreviated. More specifically, the testing and data validation phase is waived. While facility staff and WyIR staff will work together to ensure that patient information flows into the receiving application with ease, there are no specific testing requirements that the facility must pass in order to be approved into the production environment. Query only connections will be live in production as soon as connectivity is established. If the facility requests to add the reporting functionality at a later date, they will be required to go through the full onboarding process including the testing phase.