



Immunization Interface Onboarding Process Steps for HL7 Electronic Data Exchange



Phase	Pre-Establishing Readiness	Establishing Readiness	Connectivity	Testing & Validation	Pre-Go Live	Post Go Live Maintenance
Activities	<p>Organization indicates interest in electronic data exchange (EDE)</p> <p>Interface development survey is completed by organization</p> <p>Organization is placed in onboarding queue</p> <p>Inform organization of status in queue</p> <p>Determine organization's readiness</p>	<p>Send official invitation to onboard</p> <p>Hold kickoff meeting</p> <p>Hold EHR system demonstration meeting</p> <p>Provide data requirements information</p>	<p>Provide technical information for IIS TEST</p> <p>Establish a connection between EHR and imMTrax</p> <p>Begin sending organization's PRODUCTION data</p>	<p>Baseline data review</p> <p>Regular data reviews</p> <p>Provide data quality feedback to organization and EHR vendor</p> <p>Adjust clinical workflows as needed</p>	<p>Organization staff receive merge queue training</p> <p>Organization staff receive VFC/inventory training</p> <p>Select go live date</p> <p>Hold project wrap up call</p> <p>Provide technical information for IIS PRODUCTION</p>	<p>Send live interface follow up communication</p>
Goals	<p>Ensure onboarding queue is prioritized with approximate project start dates</p>	<p>Establish open communication between all project participants</p> <p>Ensure communication of necessary project information</p>	<p>Ensure technical aspects of data exchange: connectivity is established, HL7 messages are flowing as expected</p>	<p>Ensure data quality meets IIS standards</p> <p>Ensure that organization staff take responsibility for data quality</p>	<p>Ensure all project participants are well informed about the impact of interface going live, and expectations of the live interface</p>	<p>Ensure that all post live expectations are communicated appropriately and in a timely manner</p>
Tools	<p>Ranking worksheet (internal)</p> <p>Getting started checklist (external)</p>	<p>Onboarding invitation (external)</p> <p>Required data elements for EDE document (external)</p> <p>MT 2.5.1 HL7 Implementation Guide (internal/external)</p> <p>System demo checklist (internal/external)</p> <p>State data thresholds document (external)</p>	<p>Connectivity Document (external)</p>	<p>Project template (internal)</p> <p>Error & Warning report (internal)</p> <p>ACK messages</p>	<p>Go live form (internal)</p>	<p>Post live email (external)</p>