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HL7 Data Exchange On-Boarding for Health Plans

Texas Immunization Registry

Interoperability Team : 1-800-348-9158 Option 3

ImmTracMU@dshs.Texas.gov

Introductions

- Yiuliana Rodriguez – Interface Analyst

Overview

- HL7 vs IHQ
- HL7 Onboarding Process
 - The Bidirectional Readiness Checklist
 - Bidirectional ROI
 - Testing
 - Production
- Resources

Terminology

Terminology we will use in this presentation:

- BiDX = Bidirectional data exchange
- Registry = Texas Immunization Registry
- Orgs = Providers, healthcare entities, organizations
- EHR = Electronic Health Records systems
- POC = Your Org's registered Point of Contact

HL7 vs IHQ



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IHQ Process

- Plain text file sent via FTP
- Requests sent in batches quarterly or annually
- Long resource intensive processing time
- IHR returned containing immunization records
- IHQ standard no longer maintained



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HL7 Process

- Message formatted using the CDC HL7 specifications
- HL7 is a set of standards for sending clinical data between software applications
- Records requested one at a time
- Requests sent monthly or quarterly
- Records returned from ImmTrac2 in real-time



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Bidirectional Readiness



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The Bidirectional Readiness Checklist

- The Bidirectional Readiness Checklist:
 - Contains a list of requirements to participate in BiDX
 - Can be found on Forms & Documents Webpage
 - Must be reviewed before contacting the registry
 - Requirements met prior to Registration of Intent (ROI)
 - The Bidirectional Readiness Checklist ensures that your organization is in a good position to begin BiDX



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Requirements (1 of 2)

- Org's EHR must be able to meet each of the below requirements:
 - Have bidirectional messaging capabilities
 - Send messages using HL7 version 2.5.1 Release 1.5
 - HL7 is an electronic health records messaging standard
 - Be up-to-date with all relevant system upgrades
 - Testing cannot stop for a system upgrade. Removal from testing.
- Orgs must speak with EHR vendor for information



Requirements (2 of 2)

- All sites must be registered with ImmTrac2
- All sites must have up-to-date site agreements
- Parent-child relationships must be correct



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Additional Preparation (1 of 2)

- BiDX testing is time-limited
- All necessary resources should be planned for in advance
- Designate a Subject Matter Expert (SME) to oversee testing
- Testing participants have been identified
 - Able to devote one week to testing
- EHR vendor has technical resources ready and available



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Additional Preparation (2 of 2)

- Workflows have been analyzed and future state planned
- Monitoring and error management plan prepared
- Organization wide training plans prepared



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Bidirectional ROI



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What is the Registration of Intent?

(1 of 2)

- Allows organizations to inform the registry of their readiness to begin bidirectional data exchange.
- Captures key information about your organization and EHR vendor.
- Identifies which bidirectional features your organization will use
- Provides your agreement to follow registry policies



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What is the Registration of Intent?

(2 of 2)

- The bidirectional ROI is a new registration
 - If your organization **previously** submitted a unidirectional (batch file) ROI, you will need to submit a new ROI for BiDX
- The ROI must be completed by an authorized representative of your organization's parent/stand-alone site



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Completing the BiDX ROI



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Completing the ROI

- The Bidirectional ROI contains six sections that must be completed:
 - Organization information
 - Primary Contact Person
 - Secondary Contact Person
 - Bidirectional Exchange Readiness
 - Query and Reporting Immunizations
 - Electronic Signature

Completing the ROI: Organization Information

- Enter the name and address of your organization's parent/stand-alone site
 - You will also need your parent TXIIS ID
 - Contact the registry for assistance identifying your parent site or TXIIS ID
- Will you report for multiple facilities?
 - If you are a stand-alone org, the answer should be *No*
 - If you have a parent/child structure the answer should be *Yes*



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Completing the ROI: Primary Contact Person

- Identify and provide contact information for the individual who will take lead of your BiDX setup
- This individual must:
 - Be an employee of your organization
 - NOT an EHR vendor employee
 - Participate in all BiDX setup activity
- Should be the registered Point of Contact



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Completing the ROI: Secondary Contact Person

- This individual will act as a back-up to the Primary Contact Person
- This person must:
 - be an employee of your organization
 - participate in all BiDX setup activities
 - Be prepared and capable of taking lead if needed
- Consider selecting your Primary Registry Contact



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Completing the ROI: Bidirectional Exchange Readiness (1 of 3)

- This section identifies your capabilities and readiness for BiDX
 - Speak with your EHR vendor before completing this section
- Are you currently sending HL7 files to the registry?
 - If you are participating batch file data exchange, answer *Yes*
 - Otherwise, answer *No*



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Completing the ROI: Bidirectional Exchange Readiness (2 of 3)

- Is your facility and EHR ready to participate in BiDX?
 - Only answer *Yes* if:
 - your organization has all necessary technical capabilities in place
 - Your EHR has all necessary updates installed
 - Can send and receive SOAP messages
 - If your answer is *No*, do not submit your ROI



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Completing the ROI: Bidirectional Exchange Readiness (3 of 3)

- Which Method of BiDX will your organization use?
 - This question identifies which BiDX feature you will use
 - Query Only
 - Query and Reporting



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Bidirectional Exchange Readiness: Query Only

- Real-time record requests and forecasting
- NOT able to report new or historical immunization records
- Should only be chosen by organizations that do not administer immunizations



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Completing the ROI: Electronic Signature

- The ROI can be:
 - Signed electronically
 - Printed, signed, and scanned as a PDF
- The ROI should be signed by the Primary Contact Person or an individual authorized by the organization
- The signed ROI should be emailed to ImmTracMU@dshs.texas.gov



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ROI Processing

- Once received by the registry, ROIs are processed within 3-4 business days.
- The registry may contact the Primary Contact Person with follow-up questions
- Once processed, the registry will provide the Primary Contact Person with next steps and timeframes.



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Testing Preparation



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Purpose of Testing

- BiDX Testing ensures:
 - Connection is set up correctly
 - HL7 messages are formatted correctly
 - EHR functions as expected
 - Workflow analyzed and prepared



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Goal of BiDX Testing

- The goal of Bidirectional Data Exchange Testing is to:
Complete all testing scenarios without errors

Requirements

- Testing team identified:
 - Org staff and EHR support
 - Org Subject Matter Experts (SME)
 - Available for 1 week of testing
 - Who will need ImmTrac2 test access?
- EHR BiDX functionality ready



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Credentials & Resources

- Webservice credentials sent to POC
 - Includes Webservices URL
- ImmTrac2 test access sent to individuals
- Resources sent to testing team
 - Test Plan
 - Test Patient List



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Resources in Detail

- Test Plan
 - List of scenarios that must be tested
 - All scenarios must be successful
- Test Patient List
 - QBP Only Orgs: Full list of patients to test with



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Test Scenarios



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Connection Testing

- Simple test to confirm:
 - EHR can connect to the registry
 - Webservice credentials are correct



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QBP Testing

- Send QBP messages for each test scenario
- Was a response received without error?
- Review the returned records in the EHR
- Compare results to the record in ImmTrac2 test



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Troubleshooting

- The Data Exchange Error Guide
 - Explains all errors returned by the registry
 - Offers solutions to many errors
- Review your documentation and the scenario
- Collaborate with your EHR Vendor
- Contact the registry if your team cannot resolve the error



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Completing Testing



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Finishing Testing

- Plan “Go-Live Date”
 - Discuss anticipated records request volume
- Once all Test Scenarios are successful
 - Contact the registry for review
 - List of each scenario tested for each patient
- The registry will validate test results
- Your team will be notified of successful completion



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Production



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What is BiDX Production?

- Production is live BiDX
- Real records exchanged with the Registry
 - No more test records
- Ongoing live connection



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Credentials

- Credentials sent to POC
 - Includes production webservice URL
- Testing credentials disabled
 - ImmTrac2 Test access disabled



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Sending Production Files

- Confirm “Go-Live” date
- Query Request
 - Send first “batch load” record request
 - Send on-going history requests as needed
 - Response from registry sent in real time



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Monitoring & Maintenance

- Develop monitoring and maintenance workflows
- Regularly monitor BiDX activity
 - Messages sent and received successfully
 - Review errors returned
- Contact the registry if assistance is needed



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Resources

Identify tools available to assist you.



Registry Websites

- ImmTrac2 Website

- <https://immtrac.dshs.texas.gov/TXPRD/portalHeader.do>

- DSHS Website

- <https://dshs.texas.gov/immunize/ImmTrac/>

Resource Guides

- *Informational Guide on Bidirectional Data Exchange, #11-15957*
- *Bidirectional Readiness Checklist , #11-15235*
- *HL7 2.5.1 Implementation Guide, #11-14872*
- *Texas Immunization Registry HL7 2.5.1 Error Guide, #11-15703*
- www.dshs.texas.gov/immunize/immtrac/forms.shtm

Email

- ImmTrac2@dshs.texas.gov

Access, site registrations or renewals, ImmTrac2 user changes, registry trainings or publications

- ImmTracMU@dshs.texas.gov

Data exchange questions, promoting interoperability, data quality reports

Thank you!

Texas Immunization Registry

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Q & A

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Access, site registrations or renewals, etc.

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Data exchange and promoting interoperability