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.	• Verify initial setup is correct and data from the EHR is successfully populating the production IIS.
• Identify a primary sponsor to be an active participant in all elements of the onboarding process and attend meetings/conference calls as appropriate.	• 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.
• Provide production or production-quality data for testing and validation.	• Immediately report issues to the IIS and EHR contacts for assistance in troubleshooting.
• Coordinate appropriate staff for end user testing and troubleshooting.	• Correct data entry errors and establish appropriate policies/procedures to address issues with workflow and data quality; train staff as needed.
• Identify and resolve issues caused by improper workflows or poor data entry that adversely impact data quality.	• Communicate with IIS about any system changes/updates or outages that may impact existing interfaces.
• Work with EHR vendor or provider technical staff to resolve issues with the interface or submitted messages.	• 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:
    o Mange patients that may need to be inactivated from the clinic or jurisdiction (CT).
    o 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!