Script for Registration of Intent

Closed captioning for this presentation is available at the following link:
https://tcc.1capapp.com/event/dshs/
The link will also be provided in the chat.

Introductions

Hello everyone.

My name is Eunice Mbungkah. I am a Program Specialist with the Texas Immunization Registry and I will be your main presenter today.

I am also joined by John Boggs an Interface Analyst, and Angela Herrera, an Interoperability Coordinator, both with the Texas Immunization Registry.

For this presentation, if you have any questions, you will see an option for submitting questions at the bottom of your screen. Please submit your questions there and we will address and answer those questions once the presentation is complete.

Title Slide

Registration of Intent

Overview
During this presentation we will be discussing the following:

- What an Registration of Intent or (ROI) is,
- Requirements before submitting an ROI
- How to Access the ROI
- Completing the ROI and
- What are the Next Steps to take after you submit your ROI

What is the Registration of Intent? (1of2)

The Registration of Intent is a form which allows organizations to inform the Texas Immunization Registry (or TIR) of their readiness to begin data exchange.

The ROI captures key information about your organization and electronic health record (or EHR) vendor such as who is your EHR vendor and what staff from your organization will be participating in the setup of your data exchange connection.

What is the Registration if Intent? (2of2)

The ROI form must be submitted prior to your organization's data exchange account can be created by the registry staff.

Submitting the ROI, is the second step in setting up a data exchange connection with the registry.

Requirements (1of2)

Prior to submitting an ROI, your organization must:

- Have up-to-date registry site renewal agreements for all sites registered with the Texas Immunization Registry, including the parent or stand-alone organization and all sub-sites.
- If your organization has multiple sites, one site – usually the main headquarters – is identified as the 'parent site' and all other sites will be subsites.
- If your organization has only one site, it is considered a 'stand-alone' organization.

You want to Register any sites not currently registered with the TIR by completing a Site Agreement in ImmTrac2.

If any of your organizations' site agreements are expired, you will receive a "validation error" when submitting an ROI. The sites with expired site agreements will be highlighted in red.

Requirements (2of2)

The person who completes the ROI for your organization must:

- Have an *active* ImmTrac2 user account.
- They must also be associated to, meaning have access to, the main parent organization or the stand-alone organization in ImmTrac2.
- They must be an employee of the organization, not the EHR vendor.
- Prior to submitting the finalized form, they must review the ROI with their EHR vendor to ensure that all information is accurate to the EHR's capabilities.

For assistance with ImmTrac2 user accounts and access, contact the registry.

Accessing the ROI (1of 2)

To access the ROI:
First, login to ImmTrac2 using your parent or stand-alone organization's 'Org Code'.

Accessing the ROI (2of2)

Next, click the **'Registration/Renewal'** tab at the top of the page.
If you do not see the tab, click the 'Home' tab and then click the 'ImmTrac2' button next to your parent organization's name.

Finally, click the '**Registration of Intent**' link at the bottom of the list of options.

Completing the ROI (1 of 9)

To complete the ROI:

You want to begin by answering the first two questions that appear.
If you are reviewing the ROI prior to speaking with your EHR vendor, answer 'yes' to both of these questions, but DO NOT submit your answers. You may exit out of the ROI at any time without saving your answers.
Please note that the questions on the actual ROI are not numbered.

The first question: ***Is your organization pursuing Meaningful Use?***
If you are participating in the Centers of Medicare and Medicaid Services EHR Incentive Program (formerly known as Meaningful Use) which is now called Promoting Interoperability Programs then click 'Yes.'

Completing the ROI (2 of 9)

The second question: ***Can your organization submit data in HL7?***
Health Level Seven (abbreviated HL7) is a health data messaging format approved by the Centers for Disease Control and Prevention (CDC) to submit patient and health data.
Your EHR must be able to use HL7 to participate in data exchange with the registry.

Your EHR vendor can provide you with the answer to this question.

If you answer 'Yes' to both of the previous questions, a new set of questions appear on screen.

Completing the ROI (3 of 9)

The third question: ***Which method will your organization use to report data electronically to ImmTrac2?***
This question is asking how your organization will send or report data to the registry. Your options include:

- Secure FTP – This method involves the use of an application, provided either by your EHR or your local IT, to send files securely to the registry's server. This process is often automated by the EMR vendor.
- Web application – This method involves logging in to the registry's data exchange website to upload files manually.
- SOAP – This method is not available for batch submission data exchange. This method will be used once your organization has been cleared to begin bidirectional data exchange with the registry.

You should speak with your EHR vendor and local IT before answering this question. More information about the Secure FTP method can be found on the registry's website.

Completing the ROI (4 of 9)

The fourth question: ***Who is your EHR Vendor?***
Choose your EHR vendor from the dropdown list.

Remember that your EHR vendor's name might not be the same as the EHR software you use.

If your vendor is not listed, choose 'Other-EHR Not Listed' at the end of the list. Do not contact Customer Support to request your vendor be added to the list.

Completing the ROI (5 of 9)

The fifth question: ***Which EHR software do you use?***
Choose your EHR software from the dropdown list.
If your EHR software is not listed, choose 'Other-EHR Not Listed'.

Completing the ROI (6 of 9)

The sixth question: ***Please list the name of your team members who need to receive acknowledgment emails about your file activity on ImmTrac2.***

List the primary individuals who are involved in setting up and supporting your organization's data exchange, both internally and from your EHR vendor.

The individuals added will receive frequent emails from the registry regarding your organization's data exchange activity and additional announcements.

You do not need to add your organization's Point of Contact. That individual will always receive these communications. If you are unsure who your Point of Contact is, they will be displayed just below this question.

Completing the ROI (7 of 9)

The information you will need to provide for each individual includes:

- Their ***Title***

This identifies the general role of the individual being added.

The options include; ***EHR*** for anyone employed by your EHR vendor; ***Provider – Administrative***, ***Provider – Clinical*** and ***Provider – IT*** for anyone employed by your provider organization; and ***Service Provider*** for any other third party that supports your data exchange connection.

Choose the option from the dropdown that is closest to the individual's role regarding data exchange.

- The ***First Name ,***
- The ***Last Name*** of the individual, and
- An ***Email*** address for the individual***.***

Enter in the Email address that the Registry will use to contact the individual or their organization for anything data exchange related.

Once all the above is filled in, click 'Add'. If you do not click the Add button, the individuals are not added as part of the ROI.
Repeat these steps for each additional contact.

Completing the ROI (8 of 9)

The seventh question: ***How often will your organization submit immunization data?***

This question is asking how often you plan to send data to the registry.

The options include:
Weekly for once per week; Bi-Weekly of once every other week, Monthly for once per month and annually for once per year.

The registry prefers weekly submissions.
Please also note that *Annually* may only be chosen for special cases. If your organization provides direct patient care, you likely do not qualify for annual submission. You must speak with the registry before choosing this option. If your organization only gives immunizations seasonally, choose how frequently you will send data during those seasons.

Organizations may NOT choose to submit files more than once per week.

Completing the ROI (9 of 9)

Next, you will see a section that states:
Here is a summary of your current organizational site information for your review.
The information shown includes the TXIIS ID, Name, Address, and site agreement date for each of your organization's sites.

Review the list to ensure that no sites are missing and that all site agreements are up to date. Remember that expired site agreements will prevent you from submitting your ROI.

Take note of the TXIIS ID number(s) listed. Your EHR vendor will need this information to set up the data exchange connection correctly.

Finally, to complete and submit the ROI click 'Submit'.
ROI's cannot be edited after they have been submitted, so it is important to ensure that all answers are accurate and complete prior to clicking 'submit.'

ROI Submitted

Once the ROI has been submitted successfully, a copy of the ROI with the organizations responses will be emailed to your organizations Point of Contact. This should be saved because the information will not be available to you online.

If your organization had already submitted an ROI you will receive an error stating that your organization previously submitted a Registration of Intent and the date it was submitted on once you click on the Registration of Intent option in ImmTrac2.

Next Steps

The registry reviews and processes the ROI within 2-5 business days.

Once processed, your organization’s Point of Contact receives two emails from the registry containing the following:

Your organization’s File Transfer Protocol (abbreviated FTP) Username and Password. This also called the data exchange credentials.

A link to the registry's FTP website, also called the Web Transfer ThinClient, and

Links to data exchange resources to help you learn how to use the data exchange account and your responsibilities with data exchange.
The FTP account is what allows your organization to send data to the registry and receive response back from the registry.

Your Point of Contact should share the contents of both emails with your EHR vendor and internal IT staff that support your organization.

Your EHR vendor will use the information to set up your data exchange connection so that you may begin the testing phase.

The testing phase will be covered in a later presentation titled **Data Exchange Testing**.

Resources: Training

Various resources are available to you for assistance with the registry.
We offer in-person trainings through our local or regional health departments in your area. Staff from these health departments can come to your facilities to provide an overview on how to use ImmTrac2, add patients as registry clients and looking up patients to determine if they are registry clients. To set up in-person trainings for ImmTrac2, contact us and we can get those requests out to your local health department. Do note that our local and regional staff do not provide trainings on data exchange, those specialized trainings are limited to the Interoperability Team.

We also have a library of online training videos available on the DSHS Texas Immunization Registry website. These videos are a great resource for visual learners or for staff needing refreshers on ImmTrac2 features or functions.

Resources: Guides

Another resource option available to you are guides that provide an overview and instruction on various topics. Some of the guides available that may assist you with the steps covered today include:

The Electronic Data Exchange Resource Guide, (stock #11-15231), -- this provides detailed steps and information on the six steps to establish a data exchange connection with the registry, and

ImmTrac2 Site Renewal Guide (stock #11-15252), -- this provides detailed steps and information on how to submit an ImmTrac2 site renewal.

Resources: Live Support

Finally, the last resource available is live support!

Our customer support staff are available to assist you Monday through Friday, 8 AM to 4:30 PM central time.

Contact Information: Customer Support Line

To reach us here at the Texas Immunization Registry you can contact Customer Support by phone calling 1-800-348-9158.

For assistance for the general public (such as requesting immunization records), choose option 1.
For assistance with the ImmTrac2 website, choose option 2.

For assistance with data exchange or to reach the Interoperability Team, choose option 3.

For assistance with site registrations or renewals, choose option 4.

Contact Information: Emails

You can also contact the Texas Immunization Registry by email. The registry has two email addresses.

For questions about ImmTrac2 access, site registrations or renewals, training or publications, email us at ImmTrac2@dshs.Texas.gov.

For any questions related to data exchange, data quality or Promoting Interoperability, email us at ImmTracMU@dshs.Texas.gov.

Thank you

Thank you from the Texas Immunization Registry for attending this presentation.

Q & A