Script for “Data Quality and Error Resolution” Webinar

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Title Slide

Today we will be discussing the Registration of Intent, or ROI, for bidirectional data exchange.

Introductions:

Good afternoon everyone, my name is Eunice Mbungkah. I will be your main presenter today. I am a Program Specialist with the Texas Immunization Registry.
I am joined by Suzanne Murphy, an Interface Analyst with the Texas Immunization Registry.
For this presentation, if you have any questions, you will see the 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.

Overview:

The topics we will cover today are

- What is the bidirectional ROI?
- Completing the ROI
- And Processing of the ROI

Terminology:

We will be using abbreviations and acronyms for some of the terminology in this presentation:

- Bi-D-X will be short for Bidirectional data exchange
- R-O-I will mean the Registration of Intent
- Registry will be used for the Texas Immunization Registry
- Orgs will mean any provider, healthcare entity, or other organization that participates with the registry, and
- EHR will be used for Electronic Health Records systems

What is the BiDX ROI?

What is the Bidirectional Registration of Intent?

What is the Registration of Intent?

- The ROI is a form that allow organizations like yours to inform the registry that they are ready to begin participating in real time bidirectional data exchange.
- It captures key information about your organization and EHR vendor, such as the names of individuals that will participate in testing your new interface.
- It also allows you to identify which bidirectional features your organization will use.
- Importantly, the ROI also provides for your organization's agreement to follow all registry policies for data exchange.

What is the Registration of Intent? (2 of 2)

- The bidirectional ROI is an entirely new form.
    - If you previously participated in unidirectional (also known as batch file) data exchange, the ROI you submitted back then does not apply to bidirectional data exchange. You will need to submit a new ROI.
- The bidirectional ROI must be completed and signed by an authorized representative of your organization's parent or stand-alone site. It is entirely up to your organization to decide who that individual is for you, but it should be someone who will also participate in setting up and testing your new interface.

Completing the BiDX ROI:

Now let's review how your organization needs to complete the BiDX ROI

Completing the ROI:

The bidirectional ROI has six sections that must each be completed.

- Organization information,
- Primary Contact Person,
- Secondary Contact Person,
- Bidirectional Exchange Readiness,
- Query and Reporting Immunizations, and
- The Electronic Signature

Completing the ROI: Organization Information:

In this section, you'll be identifying and describing your organization

- You'll begin by providing the name and address of your organization. If your organization has multiple sites, this will be the name and address of your parent site or headquarters.
    - One of the pieces of information you will need to provide is the site's TXIIS ID number.

    - If you are unsure what the TXIIS ID number is or which site is your parent site, contact the registry for support and we can provide you with that information.
- Next, you'll say if you plan to report for multiple facilities. This is a simple Yes or No question.
  - If your organization is stand-alone and doesn't have any other sites, then your answer should be No.
  - If, however, you do have multiple sites that are linked to each other in ImmTrac2, then your answer should be Yes.

Completing the ROI: Primary Contact Person

The next section of the ROI is the Primary Contact Person.

- You'll need to provide the name and contact information for the main person from your organization that will be leading your Bi-D-X setup.
- This person must:
    - Be an employee of your organization
    - Meaning that they do not work for your EHR vendor or any other third-party IT support
    - And they must actively participate in all Bi-D-X setup activity with the registry
- Ideally, this person should be the registered Point of Contact that was identified on your last ImmTrac2 site agreement.

Completing the ROI: Secondary Contact Person

Next, you'll identify the Secondary Contact Person

- This is the individual who will act as a backup for the Primary Contact Person
- This person must:
    - Be an employee of your organization,
    - Participate in all Bi-D-X setup, and
    - Be ready to take lead of the project if your primary contact person becomes unavailable for any reason.
- A good choice for this role might be the individual that was identified as your Primary Registry Contact in your last ImmTrac2 Site Agreement. If this is the same person as the POC, then consider who else within your organization would be a good choice for this role.

Completing the ROI: Bidirectional Exchange Readiness:

- The next two sections cover your readiness for bidirectional data exchange and which features you plan to use.The readiness section asks a number of questions about your technical capabilities
    - You will likely want to review with your EHR vendor before answering them.

- The first question is: Are you currently sending HL7 files to the registry?
    - If you are participating in unidirectional batch file data exchange, then your answer to this question should likely be Yes.
    - Otherwise, answer No.

Completing the ROI: Bidirectional Exchange Readiness:

Is your facility and EHR ready to participate in Bi-D-X?

- You should only Yes if,
    - You have all the necessary technical capabilities for Bi-D-X in place,
    - Your EHR has all of the necessary updates installed, and
    - You are able to send and receive SOAP messages.
- If, for any reason, your answer would be NO, hold off on submitting your ROI until you can truthfully answer Yes.

Completing the ROI: Bidirectional Exchange Readiness:

Which method of Bi-D-X will your organization use? This is the question where you identify which Bi-D-X features you will use. Your options are:

- Query Only, or
- Query and Reporting

Bidirectional Exchange Readiness: Query Only

- *Query Only* allows your organization to request records and forecasts from the registry in real-time.
- Your organization would NOT be able to report new or historical immunization records to the registry.
- Query Only should only be chosen by organizations that do not administer immunizations, like some schools or health plans.

Bidirectional Exchange Readiness: Query and Reporting Immunizations

Query and Reporting provides all of the functionality of Query Only,

- Like real time history forecasting requests,
- As well as the ability to report new and historical immunization to the registry in real time, and
- The ability to add new patients to the registry or update existing patients' demographics.

Completing the ROI: Electronic Signature

The final section of the bidirectional ROI is the Electronic Signature

- The ROI may be:
    - Signed electronically, or
    - Printed, signed, and then scanned as a PDF.

- The ROI should be signed by the Primary Contact Person or another individual authorized to do so by your organization. This signature secures your confirmation that the information provided is accurate and your organization's agreement to follow all registry policies for data exchange.
- The finalized and signed ROI must be emailed to ImmTracMU@dshs.texas.gov.

ROI Processing:
- Once received, the registry will begin processing your signed ROI. Processing is typically completed within 3-4 business days.
- The registry may reach out to your Primary Contact Person with follow-up questions, so they should be prepared for communication.
- Once the ROI has been processed, the registry will reach out the Primary Contact Person to provide them with instructions on next-steps and timeframes for testing.

Resources:

Now let's finish by reviewing some of the resources that are available to you from the registry.

Registry Websites:
- The ImmTrac2 website is where you can submit and check the status of your site registrations and renewals.
- The DSHS website is where you can find all of our latest announcements as well as a wide variety of documents and training materials.

Guides, Training Videos & Webinars

We offer guides, training videos and webinars covering the following topics:
- How to complete a site registration or renewal in ImmTrac2
- How to run or retrieve reports in ImmTrac2
- How to add and manage clients and immunizations in ImmTrac2
- Identifying or addressing data quality issues in ImmTrac2, and
- Identifying or addressing data quality errors in HL7 messages.
- And we have more resources on the way

Publications:

Publications we offer include:
- Registry consent forms
- Registry posters and brochures, and
- Vaccine related publications.

Many items can be ordered and delivered from DSHS at no cost to you.

Registry Customer Support:

The registry offers customer support:

- Phone support is available at 800-348-9158
    - Unfortunately, our phone lines are currently unavailable at the time of this recording due to a majority of our staff working remotely.
- Email support is available via:
    - ImmTrac2@dshs.Texas.gov for all registration/renewal or ImmTrac2 access questions
    - ImmTracMU@dshs.Texas.gov for all data exchange related questions.

Thank You!

- Thank you for your time.
- The next scheduled presentation, which we'll hold on Monday February 8th and Friday February 12th, will cover electronic consent.
- We will now begin with the Q & A portion.