

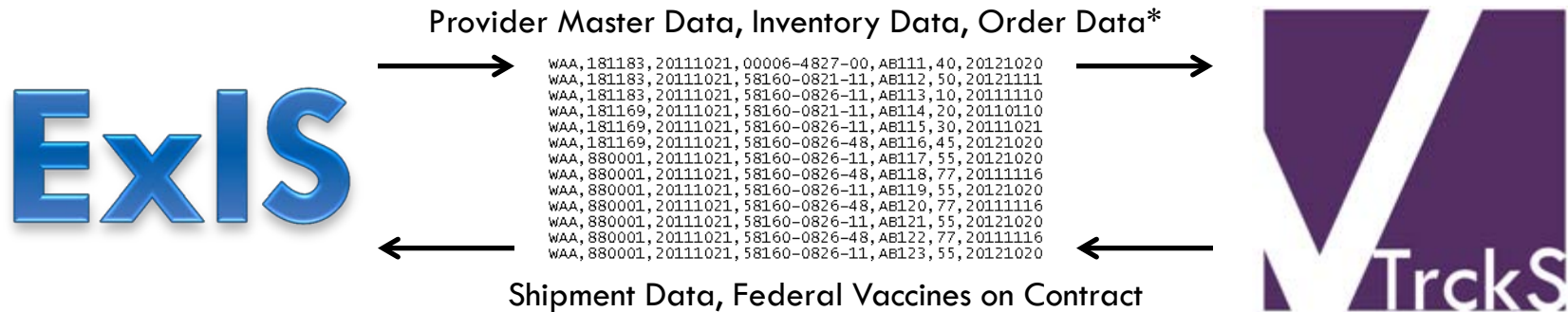
# VTrckS ExIS: Yes You Can!

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CDC/NCIRD/ISD/IISSB

September 2012 AIRA IIS Conference

# The VTrckS ExIS Vision



## Providers

- Record inventory on hand
- Order vaccines

## Grantees

- Approve orders
- Generate data\* files
- Upload shipment data

## Grantees

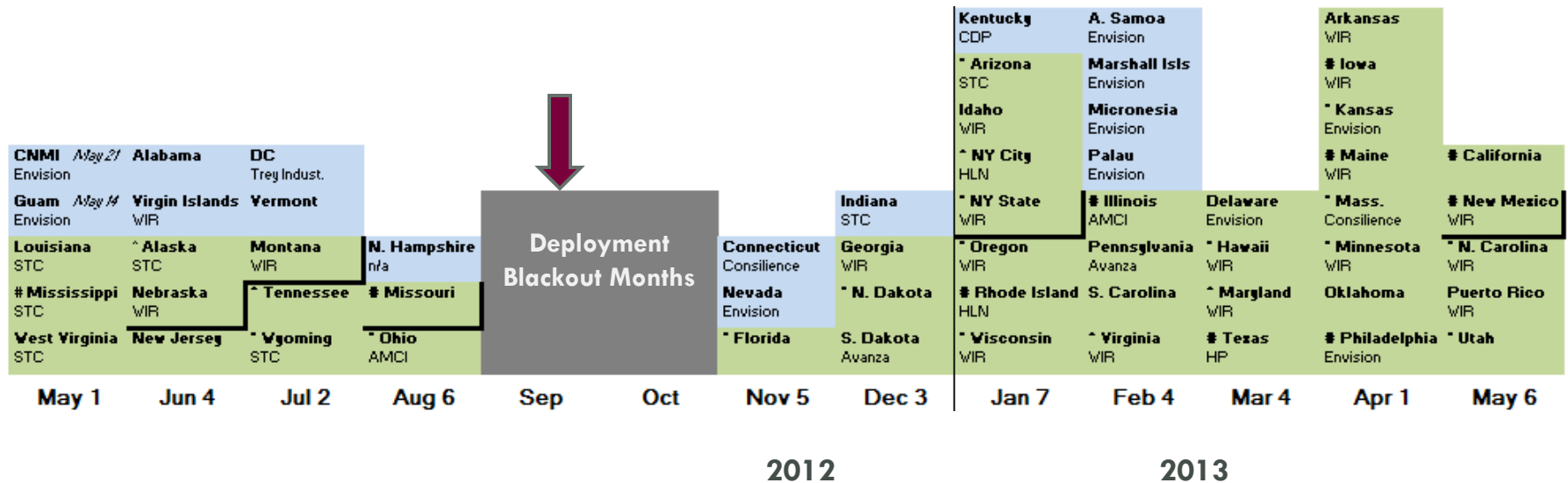
- Upload data\* files
- Manage rejected orders
- Reconcile orders
- Download shipment data

# Benefits of ExIS the Approach



- Providers already or will soon enter orders and track inventory through their IIS
  - No retraining for providers
  - Eliminate double data entry for grantee staff
- IIS has a sufficient method for granting access
- IIS is responsive to program reporting needs
- Single state presence
  - For other program needs
  - For communications
- Builds on existing assets and resources

# VTrckS Deployment Schedule



VTrckS Direct grantee

ExIS grantee

\_\_\_\_\_grantee will enter orders on behalf of providers until the ExIS is ready

# Possible Deployment Concerns

5

- Changing business processes
- Finding familiar information
- Coordinating ExIS and VTrckS deployment
- Training providers



# Steps Towards Success

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- Choose a deployment option
- Tap into online CDC resources
- Invest in provider master data
- Prepare providers and staff early
- Connect with your ExIS community





Choose a Deployment Option

# Choose a Deployment Option

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- VTrckS as a VACMAN replacement
  - Grantee staff enter orders on behalf of providers
- Minimum VTrckS ExIS functionality
  - Upload inventory and order data
- Full VTrckS ExIS functionality
  - Upload provider master, inventory, order data
  - Download shipment data



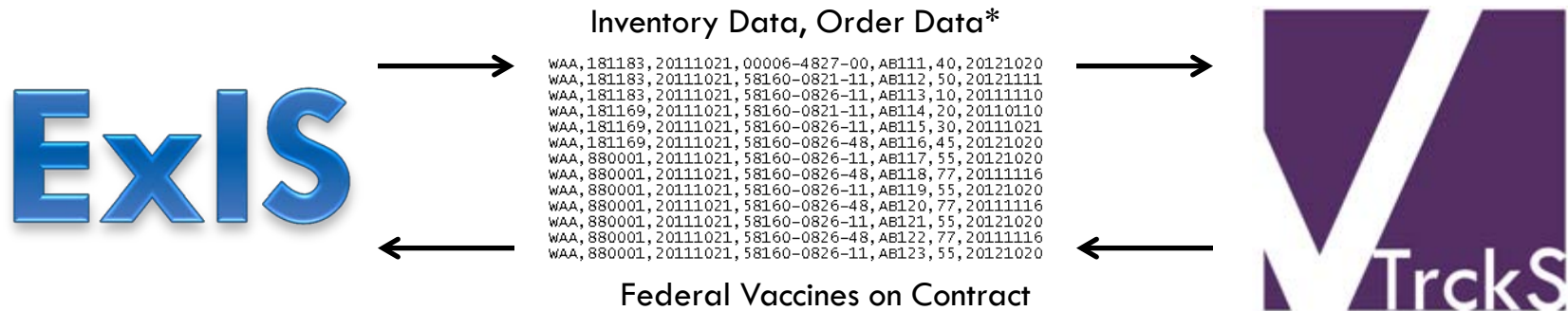
# VTrckS as a VACMAN Replacement



## **Grantees**

- Manage provider data
- Enter inventory and orders on behalf of providers
- Manage rejected orders
- Reconcile orders

# Minimum ExIS Solution



## Providers

- Record inventory on hand
- Order vaccines

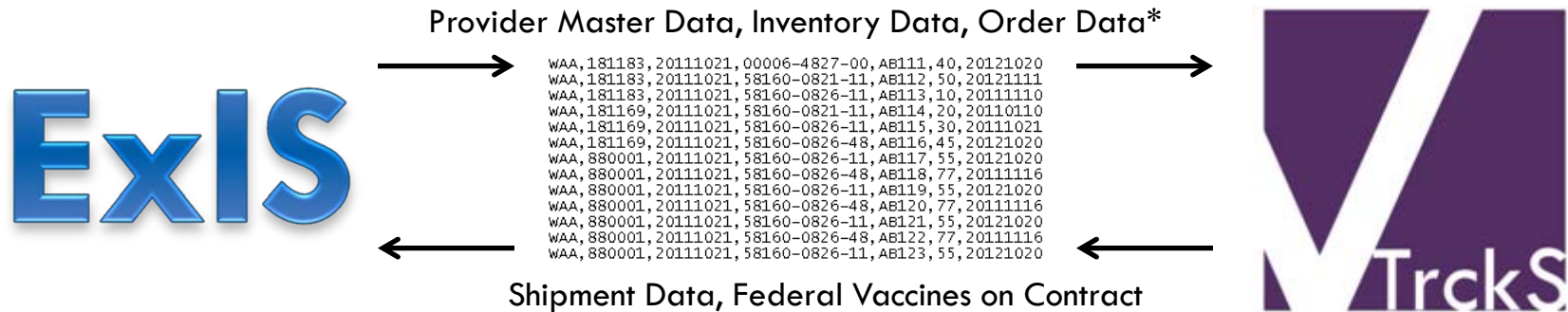
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# The VTrckS ExIS Vision



## Providers

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# Shipment Data Features

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- Contains direct ship and non-direct ship data
  - Data updated intra-day
- Contains data for orders
  - Uploaded through the ExIS interface
  - Entered directly in VTrckS by grantee staff
  - Entered directly in VTrckS by providers
    - (not an issue for ExIS grantees)
- Generated at grantee's discretion

# Lessons from the Field

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- Some grantees will deploy to VTrckS before their ExIS solution is ready.
- Grantees can request a discussion about procedures to enter orders on behalf of providers most easily and efficiently.

# Use of ExIS Interfaces

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	Providers	Inventory	Orders	Shipments
Alaska		✓	✓	
Chicago			✓	
Louisiana		✓	✓	
Michigan	✓	✓	✓	
Missouri		✓		
Mississippi		✓	✓	
Montana		✓	✓	
Nebraska			✓	✓
New Hampshire		✓		
New Jersey	✓	✓	✓	✓
Ohio	✓	✓	✓	✓
Tennessee		✓	✓	
Washington		✓	✓	
West Virginia		✓	✓	
Wyoming		✓	✓	✓



Tap into Online Resources

# Tap into Online CDC Resources

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- Design and Deployment Guidance
  - *File Specifications, B02*
  - *Processing ExIS Orders, B01*
  - Test Cases and Sample Files
- Training Environment
- Reference Materials and Job Aids
- Schedule of MM, Flash Calls, Training
- PC Readiness Tool



# Test Cases and Sample Files

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## ■ Essential test cases

<input type="checkbox"/> Identify the cases you will test. Note: only one version of Provider Master Data will be tested.
<b>Provider Master Data, v2</b>
<input type="checkbox"/> 1a. Create New Facility with Active Status 1b. Create New Contact for Above Facility
<input type="checkbox"/> 2a. Create New Facility with Active Status 2b. Create New Physician Contact for Above Facility
<input type="checkbox"/> 3. Create New Facility and Physician with Active Status
<input type="checkbox"/> 4. Update Existing Facility Status from Active to Inactive
<input type="checkbox"/> 5. Update Existing Facility Business Hours
<input type="checkbox"/> 6. Update Existing Facility Address and Communication Details
<input type="checkbox"/> 7. Update Existing Contact from Regular Contact to Main Contact
<input type="checkbox"/> 8. Update Existing Contact Communication Details
<b>Provider Ending Inventory Data</b>
<input type="checkbox"/> 1. Submit Provider Inventory On Hand
<input type="checkbox"/> 2. Submit Provider Inventory On Hand for a New Provider
<b>Provider Order Data</b>
<input type="checkbox"/> 1. Single Line Vaccine Order for Direct Ship Item
<input type="checkbox"/> 2. Multi-line Vaccine Order with Direct Ship and Non Direct Ship Items
<input type="checkbox"/> 3. State Funded Direct Ship Vaccine Request - State PO Reference Required

## ■ Sample data files

# Modules and Manuals (MMs)

18

12 weeks

Overview

11

Data Cleansing and Conversion

10

Security Access

9

ExIS File Upload Testing\*

7

Training Preparation

3

Transition Activities

1

*Provider Order Blackout*

0

*Deployment to VTrckS*

# File Upload Testing

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- CDC will send test Provider PINs and NDCs
- MM4B – ExIS File Upload Testing
  - Tuesday, October 2 at 11:00 a.m. Eastern time
  - Send inquiries to [VTrckSExIS@cdc.gov](mailto:VTrckSExIS@cdc.gov)
- Deadlines
  - Submit your test files to CDC 1 week after MM4B
  - Complete file upload testing 4 or more weeks prior to your deployment
  - *It is very important for you to meet these deadlines*



**Facilities**

**Shipping and Mailing Contacts**

**Physicians**

**Invest in Your Provider Master Data**

# Activate a Facility in VACMAN

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The screenshot shows the 'Providers' window in VACMAN. The 'Main' tab is active. The 'Status' dropdown is set to 'ACTIVE'. A red arrow points to the 'Status' dropdown from the text 'On the Provider Window, set the Status to ACTIVE'.

**Providers** [UnSorted] Updated By: 07/20/2012 VACMAN

PIN: [ ] Parent Provider (Opt): [ ]

Facility Name: [ ] (Optional: enter Last Name only in Facility field)

(Optional: First Name) [ ] Init [ ] Title [ ]

Classification: [ ] Private Other as agent FQHC or RHC

County: [ ]

Region: [ ]

PUBLICTYPE: [ ]

ORDER FREQ: [ ]

Hlth Dist: [ ]

COMBINED: [ ]

Status: **ACTIVE**

Status Date: [ ]

Record Originally Created: [ ]

Original VFC Cert. Date: [ ]

Current VFC Cert. Date: [ ]

Departed VFC: [ ]

Medicaid #: [ ]

Other: [ ]

☐ Suspend Provider Ordering

☐ Direct Ship Eligible ?

Buttons: Enrollment, View Physicians, Edit Physicians, New Memo

**On the Provider Window,  
set the Status to ACTIVE**

# Verify Shipping & Mailing Contacts

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Shipping and Mailing Contacts  
are converted to VTrck\$

Providers

Main Addresses

PIN 510-C, ARLANDRIA HEALTH CENTER , ALEXANDRIA

**Shipping Address fields**

Shipping Contact JENNY PHILLIPS

Shipping Address 3802 EXECUTIVE AVENUE, D-3

2nd Address Line

City, State, Zip ALEXANDRIA VA 22305-0000

Email

Phone (703) 519-1725

Ext (Opt)

Fax (703) 519-1738

Modem

Update Ship Instruction M-F 9AM-5PM (Required, DirectShip)

Depot Instructions (Opt, local use only)

**Mailing Address (all optional)**

Mailing Contact JENNY PHILLIPS

Mailing Address 3802 EXECUTIVE AVENUE, D-3

2nd Address Line

City, State, Zip ALEXANDRIA VA 22305-0000

Email

Phone

Ext

Fax

Copy Shipping

# Activate a Physician

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**Physicians**

Updated: 07/20/2012  
By: VACMAN

Provider PIN: **P905-B** ☒ Add to Physician count for this Provider

**PLANNED PARENTHOOD OF SOUTHEASTERN**

First Name:  Initial:

Last Name:  Title:

Medicaid No.:  Status: **ACTIVE**

Med License No.:  Status Date:

Phys ID:

MAIN?:

Other 2:

**On the Physicians Window,  
set the Status to ACTIVE**

# Analyze Data Needs

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- Use the Data Cleansing Mapping Document to determine what data will be moved from VACMAN to VTrckS
- Plan to incorporate data fields, functions and historical data into the IIS







Prepare Providers and Staff Early

# How will VTrckS Change Processes?

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- Set up and maintain available vaccines
- Ensure that vaccines are paid for appropriately
- Synchronize your ExIS with VTrckS

# Provider Routine

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- Track and reconcile inventory
- Order vaccine

# Grantee Staff Routine

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- Approve orders in the ExIS
- Upload data files
  1. Provider master data
  2. Provider inventory data
  3. Provider order data
- Manage rejected orders in VTrckS
- Reconcile orders
- Download data files
  - Shipment data
  - Federal and non-federal vaccine lists
- Check file upload/download status

# Lessons from the Field

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- Test and practice
  - Test your state's ExIS for compatibility with VTrckS
  - Practice with your ExIS's test environment
  - Test file uploads in the VTrckS training environment
- Train and be trained
  - Train providers sufficiently in advance of go-live
  - Attend VTrckS training for all features
  - <http://vtrcks-library.cdc.gov/gm/folder-1.11.4201>
  - New topics (e.g., returns) may need more attention initially

# Lessons from the Field – Wyoming

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- View trainings as a classroom; feel comfortable asking questions.
  - If you walk away more confused than when you began, you need to ask more questions.
  - After the training is over, take the time to practice.
  - Think about the skills you learned in that session; see how they apply to your process.
- Train your providers NOW.

# Lessons from the Field, Continued

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- Plan for transition activities – how will you...
  - Ensure that all ExIS functions and configurations are included in the production ExIS by go-live?
  - Handle operations and communications during the blackout period one week prior to go-live?
  - Ramp up to full scale daily operations?







Connect with the ExIS Community

# Connect with the ExIS Community

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- VTrckS Discussion on *Epi-X Forum*
  - <https://epixforum.cdc.gov>
  - See others' answers; ask your questions
- ExIS Monthly Call
  - Fourth Tuesday at 3:00 Eastern time
  - Suggest topics you want to discuss
  - The next call is September 25, 2012

# Connect, Exchange, Advance

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Your ExIS community



VTrckS discussion on *Epi-X Forum*

Monthly All-ExIS Calls

Program Manager Monthly Call (for deployed grantees)



Pilot group proved that it could be done

Grantees continue to deploy



Thank You

# Learning Objectives

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- Understand the available deployment options
  - VTrckS as a VACMAN replacement
  - Minimum VTrckS ExIS functionality
  - Full VTrckS ExIS functionality
- Understand the available CDC resources
- Understand the potential need for business process
- Understand how to connect with the ExIS community
- Understand the requirements for high quality data

## Immunization Information Systems:



# VTrckS as a VACMAN Replacement?

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- ExIS Functions
  - None – grantee staff enter orders on behalf of providers
- Plan
  - Grantee staff acquire SAMS credentials
  - Complete data cleansing / conversion activities
  - Complete ExIS training
  - Design / develop ExIS solution

# Minimum ExIS Solution?

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- ExIS Functions
  - **Upload inventory and orders files**
- Plan
  - Grantee staff acquire SAMS credentials
  - Complete data cleansing / conversion activities
  - Complete ExIS training
  - **Complete ExIS file upload testing**
  - **Practice uploading files in training environment**



# ExIS Vision?

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- ExIS Functions
  - **Upload provider master data**, inventory and order data files
  - **Download shipment data files**
- Plan
  - Grantee staff acquire SAMS credentials
  - Complete data cleansing / conversion activities
  - Complete ExIS training
  - Complete ExIS file upload testing
  - Practice uploading files in training environment