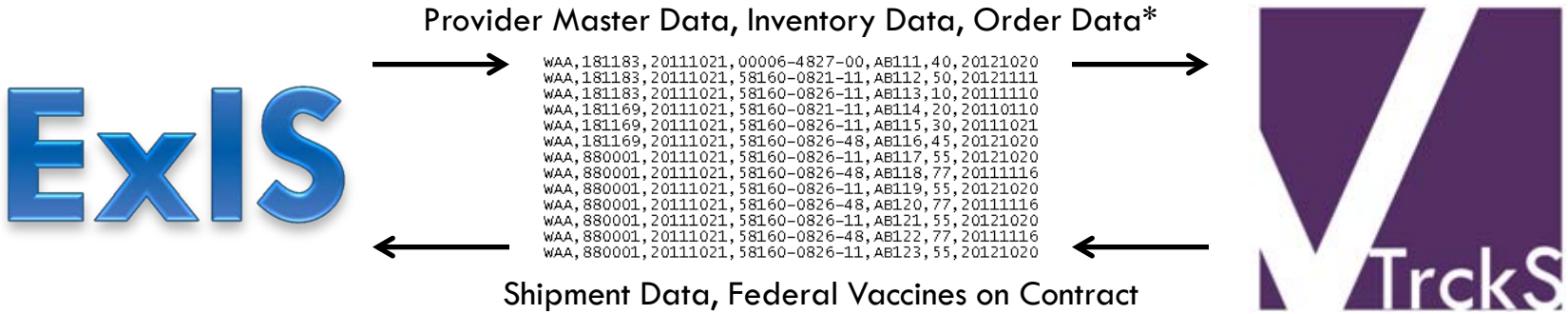
VTrckS ExIS: Yes You Can!

Janet L. Fath
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

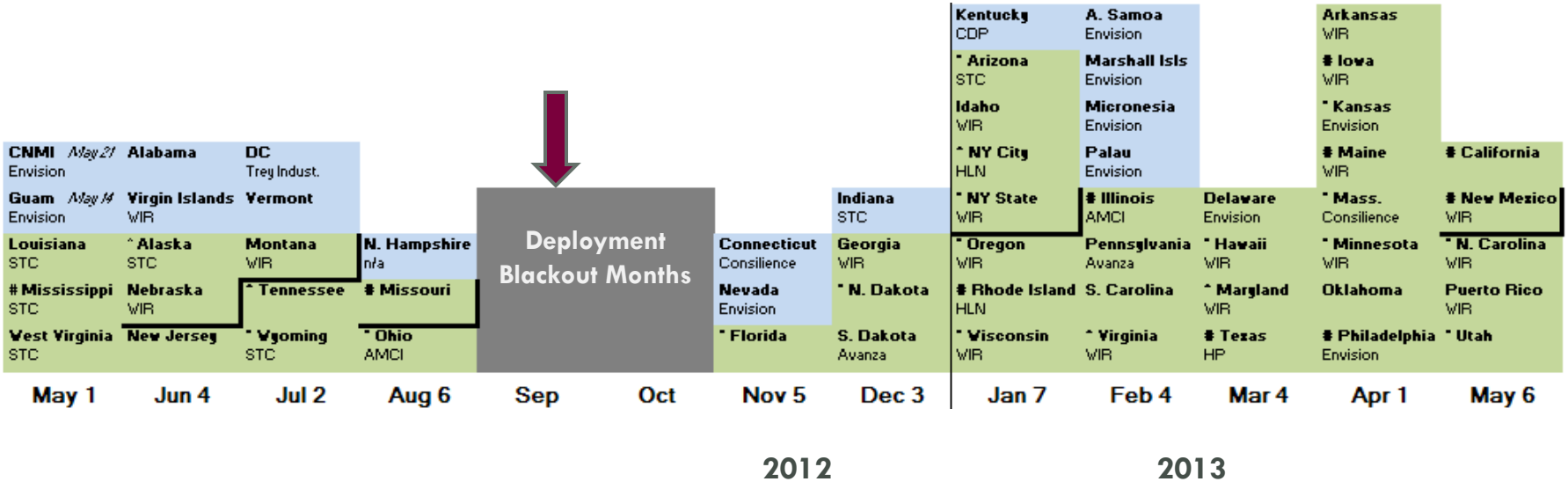
Grantees

- 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

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

Steps Towards Success

- 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

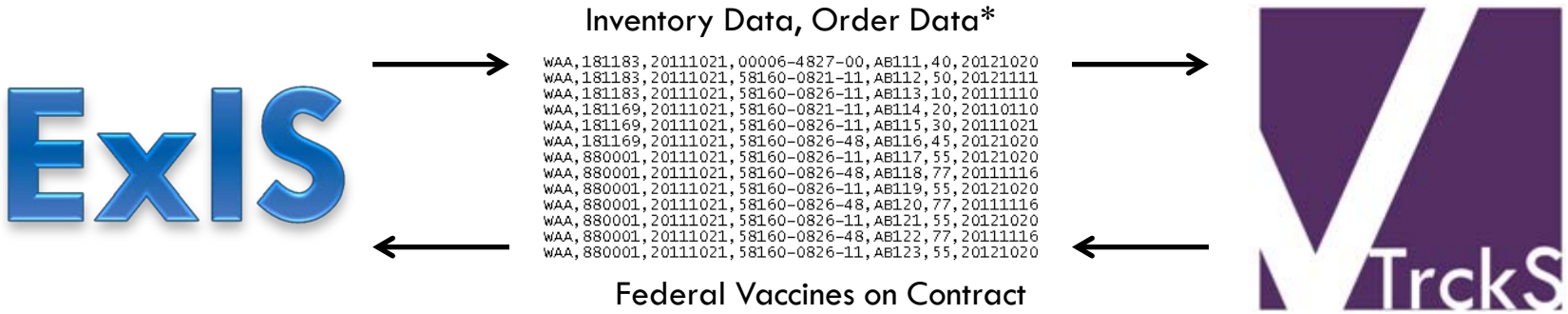
- VTrckS as a VACMAN replacement
  - Grantee staff enter orders on behalf of providers
- Minimum VTrckS ExIS functionality
  - Upload inventory and order data
- Full VTrckS ExIS functionality
  - Upload provider master, inventory, order data
  - Download shipment data

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

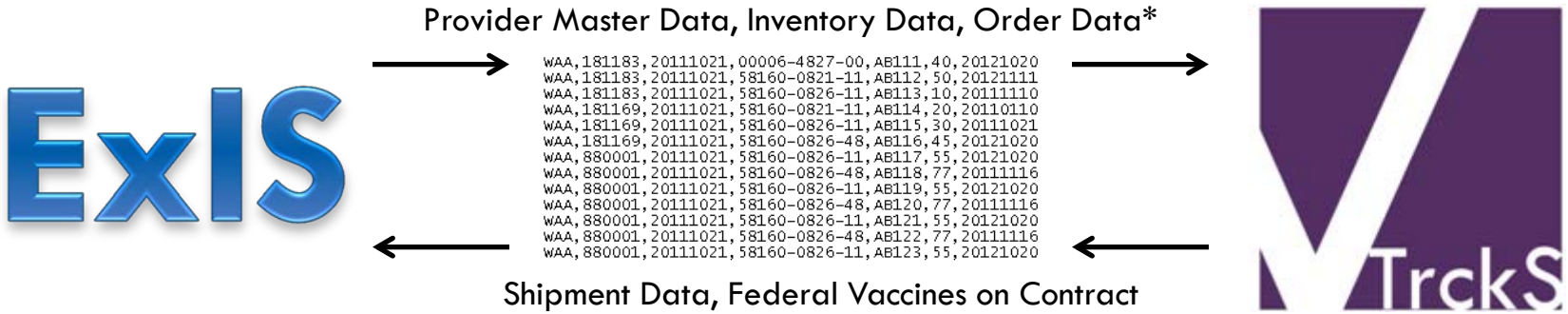
Grantees

- Approve orders
- Generate data* files

Grantees

- Manage provider data
- Upload data* files
- Manage rejected orders
- Reconcile orders

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

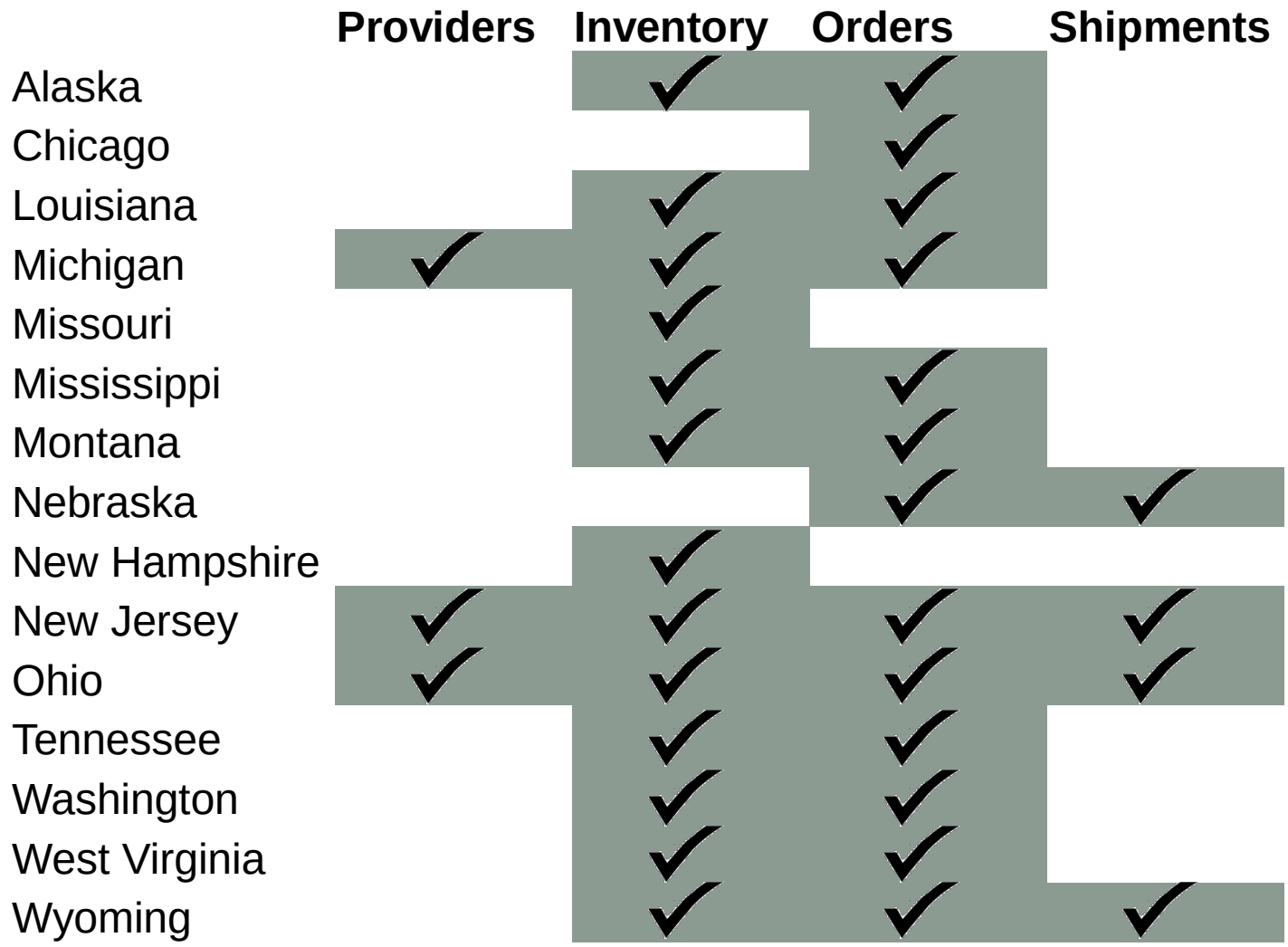
Shipment Data Features

- 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

- 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



Tap into Online Resources

Tap into Online CDC Resources

- 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

- Essential test cases

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

- Sample data files

Modules and Manuals (MMs)

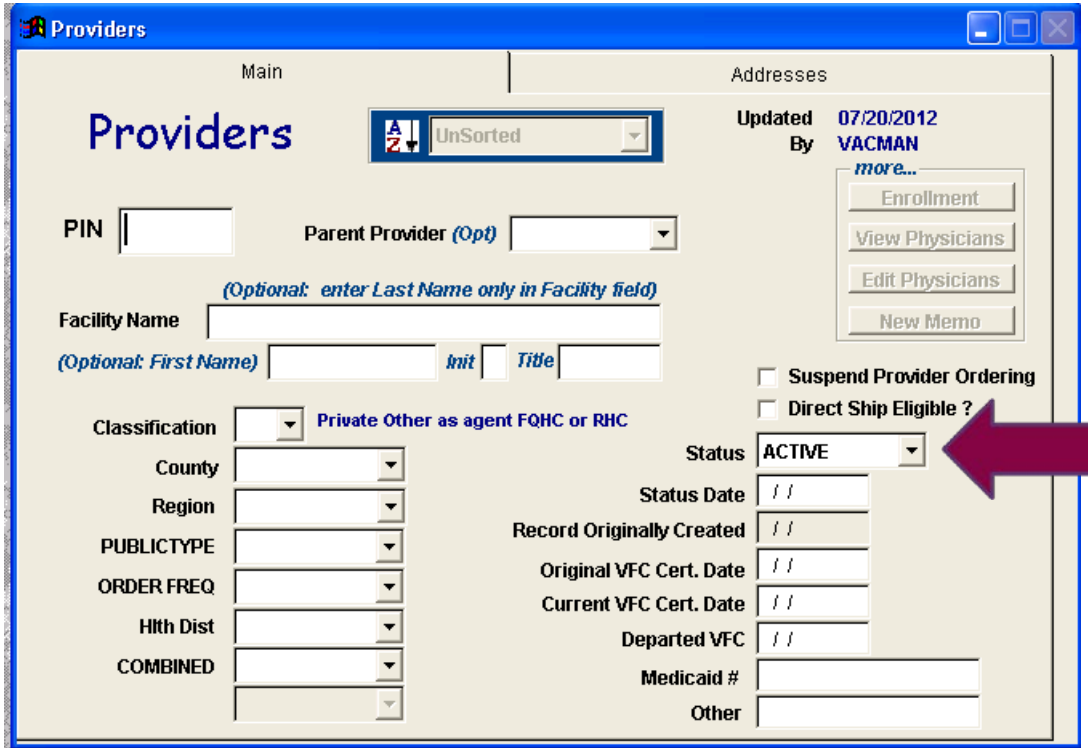
12 weeks	Overview
11	Data Cleansing and Conversion
10	Security Access
9	ExIS File Upload Testing*
7	Training Preparation
3	Transition Activities
1	*Provider Order Blackout*
0	*Deployment to VTrckS*

File Upload Testing

- 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
- 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*

Invest in Your Provider Master Data

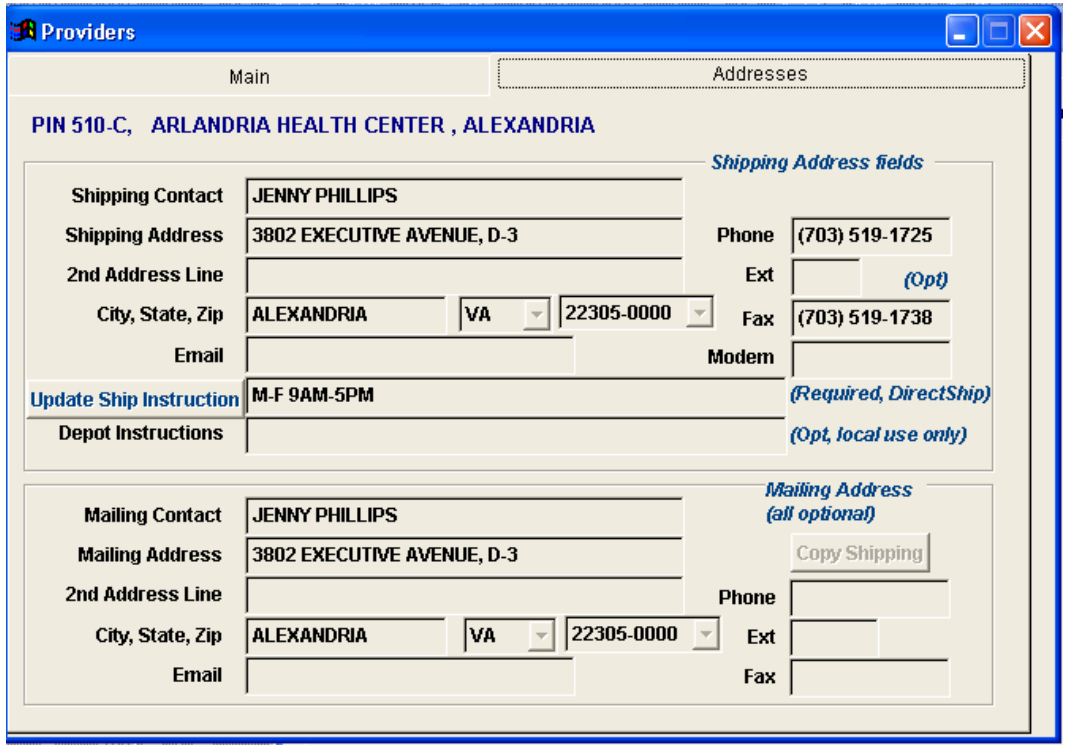
Activate a Facility in VACMAN



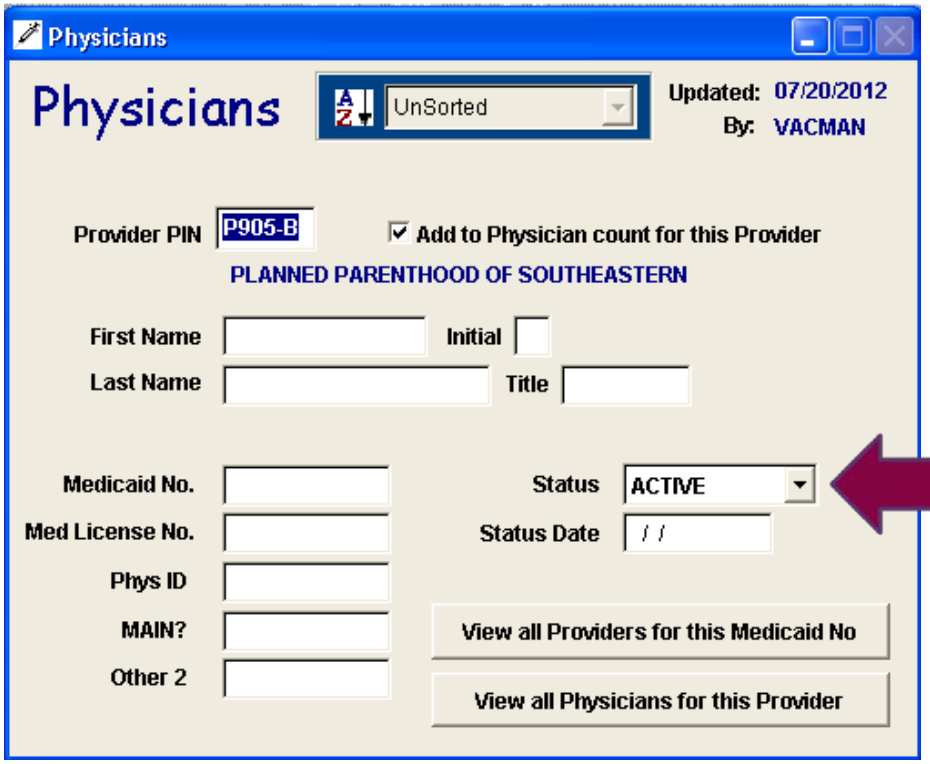
On the Provider Window, set the Status to ACTIVE

Verify Shipping & Mailing Contacts

Shipping and Mailing Contacts are converted to VTrckS



Activate a Physician



On the Physicians Window, set the Status to ACTIVE

Analyze Data Needs

- 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?

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

Provider Routine

- Track and reconcile inventory
- Order vaccine

Grantee Staff Routine

- 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

- 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

- 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

- 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

- 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

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

- 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:
CONNECT
EXCHANGE
ADVANCE

VTrckS as a VACMAN Replacement?

- 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?

- 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?

- 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