Address Cleansing and Geocoding Service Launch

AIRA
AMERICAN IMMUNIZATION REGISTRY ASSOCIATION
Immunization Information Systems for a New Era

June 1, 2017

Overview

- Background on project and pilot – Mary Beth Kurilo
- Overview of Implementation Guidance – Danielle Reader-Jolley
- Operational steps to connect – Maureen Neary

Project Selection

- The Joint Development and Implementation (JDI) Advisory Workgroup provides input and oversight for JDI activities, including selecting an Address Cleansing and Geocoding Service as an initial project

IIS/Imm Program Staff

- Therese Hoyle (MI, Awardee-dev)
- Brittany Ersery (KS, Envision)
- Mandy Harris (NV, Envision)
- Belinda Baker (WA, STC)
- Aaron Bieringer (MN, WIR)
- Michael Flynn (NYS, WIR) **
- Gerri Yett (AK, STC)

Partners

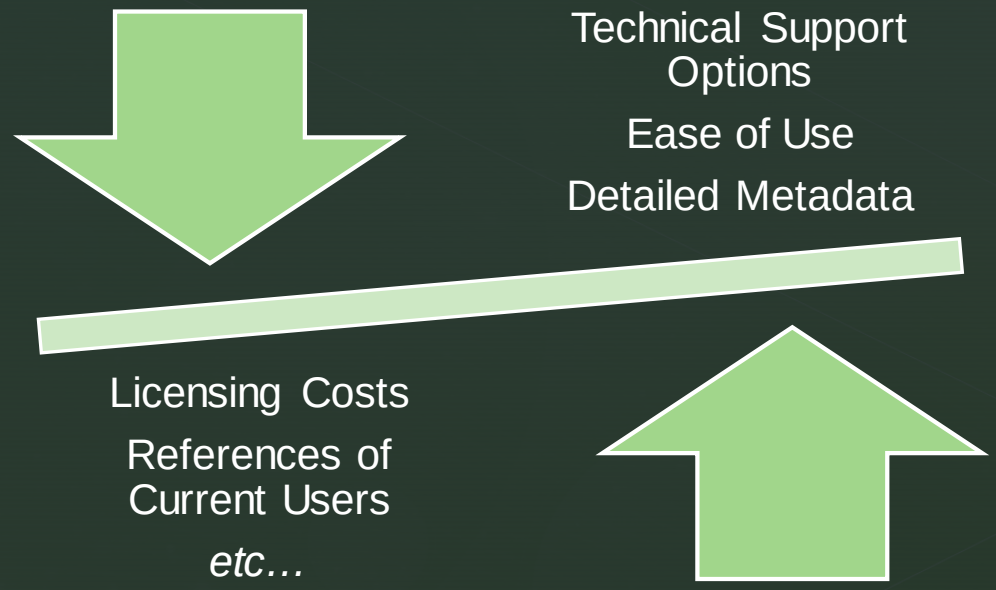
- Warren Williams (CDC)
- Bill Brand (PHII) **

IIS Vendors

- DXC – Gary Wheeler
- Envision – Steve Murchie
- HLN – Noam Arzt
- STC – Judy Merritt

Candidate Service Evaluations

- The JDI Advisory Workgroup, in collaboration with our contractor, Danielle Reader-Jolley, researched and evaluated numerous potential services



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The Group Selected:

A centralized address cleansing service, available at no cost to AIRA members

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What's Included?

The workgroup selected the SmartyStreets Service to provide:

Address Standardization	• Making an address uniform, or changing addresses to adhere to United States Postal Service (USPS) standards for address formatting
Address Validation	• Checking this standardized mailing address against an authoritative database to see if that address is a deliverable address (also called verification)
Geocoding	• Providing the GPS coordinates (or the latitude and longitude) of a physical address.

SmartyStreets

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Pilot Testing

- Thank you to our six partner organizations who tested connecting and using the SmartyStreets product in multiple ways:
  - Washington (using the STC platform) – Batch
  - Florida (using an awardee-developed platform) - Batch
  - Delaware (in partnership with the Envision product) – Batch and User Interface API
  - New York State (using the Wisconsin Immunization Registry [WIR] platform) - Batch
  - Michigan (using an awardee-developed platform) – User Interface API and Real-time HL7
  - Envision's test product (set to Kansas geographic state specifications) – User Interface API

Summary Pilot Results

- On average, data available demonstrated that deliverability increased from 71% to 88%
- The proportion of addresses determined to be undeliverable, representing unsuccessful mailing costs avoided, averaged 12%
- The standardization, validation and geocoding processes available through SmartyStreets are expected to improve the accuracy, completeness, and usability of incoming and existing data, while also improving core processes such as deduplication

SmartyStreets Implementation Guidance

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SmartyStreets Overview

www.smartystreets.com

Connection Options (Chapter 5)

- Manual Batch Processing (Command-Line Tool)
  - Data at rest
- Automated Batch Processing
  - Ongoing batch routines
- HL7 Real-Time Solution
  - Before message enters IIS database
- User Interface API (Direct Data Entry)
  - Real-time data entry + entry suggestions

SmartyStreets Development Documentation

https://smartystreets.com/docs

Discuss…

- What happens to the address originally submitted by the provider? Is this address replaced with the new address, is the original address stored in the database?
- What happens to the new address returned from SmartyStreets? Who is able to view and/or utilize this new address? What about the new metadata elements such as county, latitude/longitude, etc.?
- What unique identifier will the IIS use/generate to match the new address back to the correct patient and provider?

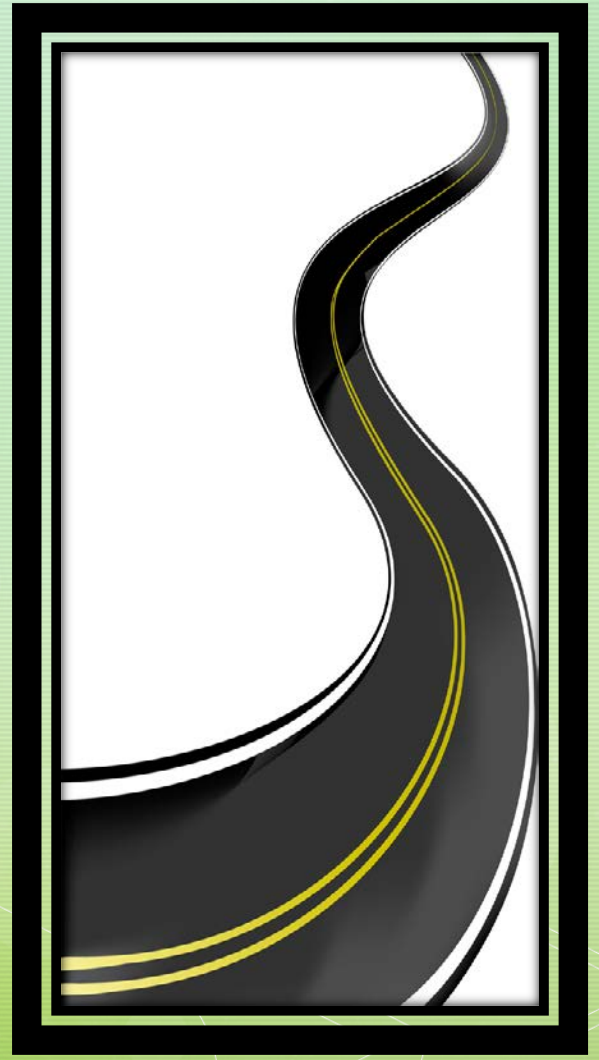
Discuss…

- Under what conditions do you accept, reject, or flag the new address?
  - See SmartyStreets output notes/footnotes...
  - Is there a need to store the record-level disposition codes for why or how the address was altered by SmartyStreets in the IIS database?
- What contingency behavior will be in place should the SmartyStreets service become unavailable for any reason?
- Does the IIS need a mechanism to manually override an address when it is being handled as an unknown or “bad address” by SmartyStreets?
- How does an uncleansed address get flagged or noted in the database for future address processing?

Getting Started (Chapter 3)

- Get familiar with SmartyStreets (https://smartystreets.com)
- Determine your preferred connection method(s) and utilize documentation on the SmartyStreets website
- Verify support for port 443 and access to the SmartyStreets service address
- Perform any necessary IIS development to connect to the service, modify import routines, or collect new fields (metadata)
- Administrative Activities:
  - Review the SmartyStreets "Terms of Service" and "Private Label Agreement"
  - Agree to and sign the AIRA Address Cleansing Service Partner Agreement
  - Receive unique authentication ID and authorization token issued by AIRA
  - Leverage AIRA and SmartyStreets for support as needed (Chapter 4)

Next Steps: The Road Ahead



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Questions/Discussion