




TennIIS Onboarding Roles and Responsibilities

A successful completion of the electronic data exchange onboarding process consists of the active engagement of all parties. The TennIIS staff, provider, EHR vendor and IT support company (if applicable) each have an important role and responsibility throughout the process. Overall, this will help to streamline the testing in TennIIS staging, prevent delays and complete the process as efficiently as possible. This document will outline the roles of each party during and after the onboarding process.




 TennIIS Staff:	Role 1	Role 2	Role 3
During Onboarding Step 1	Provide guidance on first steps, paperwork and customer service throughout the process.	Facilitate communication between all parties throughout the duration of the testing process.	
During Onboarding Step 2	Provide technical specifications, connectivity details and testing requirements / thresholds.		
During Onboarding Step 3	Assist with troubleshooting connectivity issues.	Provide feedback in the form of a data quality review on needed changes / HL7 message formatting.	
After Onboarding Step 1	Offer a "close-out" call for the provider with high-level information about TennIIS Production.		
After Onboarding Step 2	Equip provider and EHR vendor with instructions on going live with TennIIS production.	Provide any needed connectivity details.	Provide details on setting up new TennIIS users.
After Onboarding Step 3	Monitor the submission of the first messages in TennIIS.	Monitor data quality of messages; notify the practice and/or EHR vendor if errors are over a noted threshold.	Notify practice / EHR of planned and unplanned downtimes in which messages need to be resubmitted to TennIIS.

 Provider:	Role 1	Role 2	Role 3
During Onboarding Step 1	Identify a point-of-contact to participate in the onboarding / testing process and engage EHR vendor point-of-contact for testing / implementation.	Complete all onboarding documents, registrations and Trading Partner Agreement (TPA).	
During Onboarding Step 2	Work with EHR vendor to submit production quality messages (immunizations) to TennIIS staging for validation.		
During Onboarding Step 3	Work with EHR vendor on correcting any needed changes identified in the data quality review.		
After Onboarding Step 1	Monitor errors and acknowledgement messages (ACKS) post go-live.	Ensure failed messages are corrected and resubmitted to TennIIS.	Work with the TennIIS staff and EHR vendor (if needed) on data quality issues identified while in production.
After Onboarding Step 2	Communicate issues to TennIIS and EHR vendor that may impact connectivity to TennIIS		
After Onboarding Step 3	Notify TennIIS when there are major organizational changes (merges, acquisitions, closures) or point-of-contact changes.	Notify TennIIS if there is an EHR vendor change.	

 EHR Vendor:	Role 1	Role 2	Role 3
During Onboarding Step 1	Actively participate in the onboarding process and needed calls.	Assist the provider with the needed EHR training of the system as it relates to immunizations.	Configure EHR system for the provider and set-up connectivity.
During Onboarding Step 2	Ensure EHR meets current HL7 standards per TennIIS technical specifications.	Assist with identifying connectivity issues and troubleshooting.	
During Onboarding Step 3	Assist with any needed changes / corrections identified in the data quality review.		

After Onboarding Step 1	Assist provider in their transition from onboarding to TennIIS production as it relates to connectivity and implementation.	Assist the provider on how to monitor ACKs and errors after going live with TennIIS.	
After Onboarding Step 2	Continue to monitor connectivity / feeds, notifying the provider and TennIIS if there are issues.	Provide technical support to provider.	
After Onboarding Step 3	Notify TennIIS and provider when there are upcoming changes that may result in transport or connectivity issues.		

 IT Support Company (if applicable):	Role 1	Role 2	Role 3
During Onboarding Step 1	Participate on onboarding calls.		
During Onboarding Step 2	Provide technical support to EHR and provider.	Assist with identifying connectivity issues and troubleshooting.	
During Onboarding Step 3	Assist with any needed changes / corrections identified in the data quality review.		
After Onboarding Step 1	Assist provider and EHR vendor in their transition from onboarding to TennIIS production.		
After Onboarding Step 2	Continue to monitor connectivity / feeds, notifying the provider and TennIIS if there are issues.	Provide technical support to the provider and/or EHR vendor when there are issues.	
After Onboarding Step 3	Notify TennIIS, EHR vendor and the provider when there are upcoming changes that may result in transport or connectivity issues.		