SACVALLEY MEDSHARE	PROCEDURE: *New Participant Onboarding Procedure*	PROCEDURE NUMBER: *SVMS-PRO-015.003*
	Author: Elizabeth L Steffen	Origination Date: 08/12/2016
	Revised By: Jon Werner	Revised Date: 03/08/2017

Procedure for New Participant Onboarding:

1. *Evaluate Prospective Participant Needs:*
    a. Receive Request.
        i. Save to document repository under name of prospective Participant.
    b. Provide prospective Participant with approved marketing materials for services and fees.
    c. Provide prospective Participant with approved copy of the Participation Agreement, SVMS-FORM-00A.
    d. Meet with Prospective Participant. Discuss services available and document prospective participant needs. Utilize the Participant Class and Usage form (Attachment A, a 1 page(s) Microsoft® Word® document, SVMS-FORM-060).
        i. Save any notes to document repository under name of prospective Participant.
    e. Discuss prospective Participant with the Development/Executive Committee.
2. *Prepare Documents for Prospective Participant:*
    a. Prepare Participation Agreement, SVMS-FORM-00B.
        i. Ensure all exhibits are completed based on prospective Participant needs.
    b. Prepare quote.
        i. Utilize the most recent Fee Structure formally approved by the Board of Directors, located in the document repository (Attachment B, a one page Microsoft® Publisher® document, also a PDF).
        ii. Utilize Fee Calculator (a two worksheet Microsoft® Excel® workbook, SVMS-FORM-061) to ensure prospective Participant is quoted properly. ***The fee calculator is an internal SVMS usage document only.***
        iii. Prepare quote in QuickBooks®.
        iv. Discuss progress with Development/Executive Committee.
3. Follow the next section for setting up the prospective Participant to participate in the SVMS HIE once agreements and payments are received.

SVMS Workflow (Internal)

1. Provide the new participant organization a copy of the Technical Readiness Survey
    - Not all of the information is necessary to begin working on the interface.
    - A conference call may be necessary to coordinate various parties (HISP, EMR, IT, etc)
2. VPN Setup
    - Provide new participant organization with SVHIE-Peak10-VPN technical document
3. Vaults
    - Create Organization Vault for UAT and PROD
        - Create a JIRA ticket including:
            - Vault Display Name
            - Legal Organization Name
                - Often the Vault Display Name is the exact same as Legal Organization but there are exceptions.
            - Organization Address
            - *HIPAA Status:

- It should be a "Covered Entity"
  - There's generally about a week's lead time for new vaults.

4. Provide SacValley MedShare/ICA training materials and reference documents:
   - CareAlign Utilization Documents
     - ICA CareAlign User Guide
     - CareAlign Security Settings_A Quick Guide
     - Administering CareAlign Users_A Quick Guide
     - CareAlign_Vault_Data_Group_Access_with_Patient_Rights
     - SVMS CareAlign User Log
   - XDS/XDM/XDR Technical Specs
     - IHE Technical Overview
     - IHE Platform Integration Statement
     - XDR Readiness Documentation
     - XDR Inbound Checklist
     - Establishing Domains for XDR
   - Configuration Documents
     - GENERIC_reports_datalayer
     - GENERIC_lab_datalayer
     - GENERIC_immunization_datalayer
     - GENERIC_allergy_datalayer
     - GENERIC_ADT_and_ABS_datalayer
     - CareAlign Lab Configuration_A Quick Guide
   - Templates or other resource documents created by SVMS
     - SVMS CareAlign User Log
     - Patient HIE Opt Out Forms
5. Managing User Accounts
   - UAT
     - New organization should provide a preliminary list of IT users involved with establishing the interface between SVMS's HIE, the organization and any HISPs involved.
     - UAT user names should follow the format "uat#.OrganizationName" with each additional user increasing the numeric value of the prefix.

       Examples:
       1. uat.getwellhospital
       2. uat2.getwellhospital
       3. uat3.getwellhospital
     - UAT user names are generic to allow multiple users to share access the system for testing purposes.
     - After organization has gone live, all but one UAT account should be deleted.
     - Do not create any DIRECT accounts in the UAT environment.
     - Verify new admin users have been able to log on to their accounts.
   - Production
     - New organizations will provide SVMS a list of users they want to have access to CareAlign.

- Request who the organization would like to be made Admin of the vault & DIRECT mailboxes.
- Verify new admin users have been able to log on to their accounts.

- DIRECT
  - Do not create any DIRECT users in the UAT environment.
  - Reference Resources:
    1. Direct Naming Template document
    2. CareAlign Shared Mailboxes: A Quick Guide
  - Published DIRECT accounts are public and can be located by other users.
    1. Published DIRECT users function better with a robust user profile. The more information documented under the DIRECT profile, the easier it is for clinicians to search and locate each other.
    2. This function applies mostly to clinicians but any DIRECT user can be published.
  - Non-published DIRECT users are not searchable.
    1. This function applies to most medical support staff and administrators.
  - SVMS should discuss how mailboxes are typically set up for separate departments, clinical, support, and administrative staff, and how proxy accounts are set up.
  - Verify that users have been able to log on to their accounts.

Authorization	Name	Signature	Date
Board Chair	Myron E. Machula		4/6/2017
Project Manager	Elizabeth Steffen		03.31.2017

Attachment(s):

A: *Participant Class and Usage (1 page) (page 4)*

B: *Services and Fees (1 page) (page 5)*

Version	Date	Author	Comment
.001	08/18/2016	E. Steffen/Dr. K. Dorsey-Tyler	Initial release.
.002	12/02/2016	E. Steffen	Added Pharmacists row to Participant Class and Usage Attachment
.003	04/06/2017	J. Werner/E. Steffen	Added internal procedures for new Participant Setup

Attachment A: Participant Class and Usage

SACVALLEY MEDSHARE

Participant Class and Usage

Participant Class	Usage	Documentation Requirements
Acute Care Hospital	• Direct • Exchange	• Participation Agreement • Addendum (if necessary)
Critical Access Hospital	• Direct • Exchange	• Participation Agreement • Addendum (if necessary)
Provider Clinics	• Direct • Portal Exchange • EHR Interfaced Exchange	• Participation Agreement • Addendum (if necessary)
Public Health	• Direct • Exchange	• Participation Agreement • Addendum (if necessary)
Payers	• SmartAlerts©	• Participation Agreement • Addendum (if necessary)
Skilled Nursing Facilities	• Direct • Exchange	• Participation Agreement • Addendum (if necessary)
Medical Societies	• Direct	• Participation Agreement • Addendum (if necessary)
Pharmacists	• Direct • Exchange	• Participation Agreement • Addendum (if necessary)
Data Only Contributors	• Direct • Exchange	• Participation Agreement • Addendum (if necessary) • Data Agreement

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Attachment B: Services and Fees

SacValley MedShare

The Health Information Exchange for California's North Central Valley

What services do we offer?

Direct Secure Messaging (web-based, standalone)

- HIPAA-compliant, web-based communication between providers and facilities
- Requires only computer with web-browser, internet connection, optional scanner
- Operational and available now
- Physician offices: $60/provider/year,
  (one additional mailbox per office location at no additional charge)
- Skilled Nursing, Hospice, Long-term Care, EMS: $60 per mailbox/year
- One-time setup fee of $500, waived during the 2015 promotional period

Direct Secure Messaging (with full integration to provider EHR)

- If your Electronic Health Record is capable of Direct integration using the new XDR standards, you may be able to send and receive Direct messages with CCD content through your EHR
- $2500 setup fee (one interface included). $60/year for the associated XDR mailbox

Exchange (web-based query-response, standalone)

- Become an early supporter of an exciting new venture to improve healthcare communication in our area
- Provides real-time search for patient medical record information from all connected entities - results, reports, electronic health summaries.
- Contact us for more information and for pricing.

EHR-Exchange integration

- If your EHR supports XDS protocols, we can assess for possible connection to/from your EHR, allowing individual records to be transferred straight from your EHR to others.
- Provides real-time search for patient medical record information from all connected entities - results, reports, electronic health summaries, retrievable from within your EHR.
- Contact us for more information and for pricing.

Questions?

Interested in joining us?

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Improving the quality and safety of healthcare across the North Central Valley, by sharing health information in a secure and efficient fashion between all providers, facilities and patients