Checklist for Healthcare Organization (HCO) Implementation with Montana Department of Public Health and Human Services (DPHHS) for Electronic Case Reporting (eCR)

- ☐ **Communicate intent for eCR implementation.**

    - ☐ Register intent of eCR implementation with Montana DPHHS and any other applicable Public Health Agencies (PHAs).

    - ☐ HCO or Electronic Health Record (EHR) vendor notify the CDC and the Association of Public Health Laboratories (APHL) eCR Onboarding Teams about intent to start implementing eCR.

- ☐ **Ensure that eCR prerequisites are met and start planning for eCR implementation.**

    - ☐ Gather approval from HCO leadership to implement eCR.

    - ☐ EHR vendor must be [ONC certified](#) and deemed by the CDC eCR Team to be ready for eCR.

        - ▪ EHR able to generate an eICR.

        - ▪ EHR able to receive an RR message back after an eICR is sent.

        - ▪ Please visit the [CDC website](#) to check the status of eCR vendor.

    - ☐ Work with EHR vendor about options for eCR implementation.

- ☐ **Complete eCR implementation with your EHR Vendor, CDC /APHL eCR Onboarding Teams.**

    - ☐ [Confirm eCR data sharing policy path](#) that is required to send data to APHL.

    - ☐ Complete required facility list for eCR Onboarding Team.

    - ☐ Electronic Initial Case Reports (eICRs) are formatted according to the [HL7 standards for Electronic Initial Case Report (eICR) for CDA or FHIR.](#)

    - ☐ Complete all required EHR checklist items or testing scenarios required by EHR Vendor and onboarding teams to be able to generate or "trigger" an eICR.

☐ Download and implement the most recent condition code set from the Electronic Reporting and Surveillance Distribution eRSD.

- Local codes should be mapped to standardized codes (LOINC, SNOMED, ICD-10, etc.) as an eICR is sent to all applicable PHA.

☐ Implement "full triggering" for all conditions (if EHR is capable).

- **DPHHS encourages all current and onboarding HCOs or eligible providers to implement triggering for all conditions.**

☐ Establish connection with APHL's platform – AIMS.

☐ Determine the transport method for sending messages.

☐ Trigger a test eICR(s) to APHL to test connection.

☐ Confirm successful receipt back of a Reportability Response (RR) after sending test eICR(s) within EHR.

- There should be an RR received back for every eICR transmitted to AIMS.

☐ Complete Soft Go-Live (testing with production data) with CDC/APHL eCR Onboarding Teams.

☐ Complete Soft Go-Live with APHL (duration dependent on volume of eICRs received).

- During the Soft Go-Live production eICRs are analyzed through the Data Quality (DQ) Schematron and a DQ Monitoring Report of the findings including any identified issues that need to be addressed will be provided back to the HCO and applicable PHA.

☐ Review DQ Monitoring Report provided by the CDC/APHL Onboarding Teams and address any necessary errors/problems.

☐ Provide resolution to issues identified in Data Quality (DQ) Monitoring Report.

☐ PHA Validation (Go-Live)

- Montana DPHHS eCR team conducts data quality validation on production eICRs.

    - DPHHS will require an extend review period while preparing our surveillance system for eCR implementation into production.

  - Review the [Data Element Priority List](#) to see what data elements will be evaluated for completeness and accuracy within eICRs during the PHA validation phase.

  - Address any identified data quality, mapping, or triggering issues identified by DPHHS.

- **Montana DPHHS approves HCO eICRs to move into the production environment of our surveillance system, NBS.**

  - HCOs **MUST** continue with manual reporting methods until notified.

- **Received formal email notification that manual reporting methods can be stopped for certain conditions.**

    - Conditions will be validated and implemented in our surveillance system on a rolling basis.

- **Maintain standard of eICRs delivered to Montana DPHHS.**

  - HCOs are responsible for continuing to update the to the most recent Reportable Condition Trigger Codes (RCTC) from [eRSD](#).

  - Failure to meet the data quality requirements may result in Montana DPHHS requiring manual reporting methods to continue.

For more information concerning eCR please visit our [eCR website](#) or email MIDIS@mt.gov.

Acronyms

AIMS – APHL Informatics Messaging Services

APHL – Association for Public Health Laboratories

CDA – Clinical Document Architecture

CDC – Centers for Disease Control and Prevention

DPHHS – Department of Public Health and Human Services

DQ – Data Quality

eCR – Electronic Case Reporting or Electronic Case Report

eICR – Electronic Initial Case Report

EHR – Electronic Health Record

eRSD – Electronic Reporting and Surveillance Distribution

FHIR – Fast Healthcare Interoperability Resources

HCO – Healthcare Organization

HL7 – Health Level 7

MT DPHHS – Montana Department of Health and Human Services

NBS – NEDSS Base System

NEDSS – National Electronic Disease Surveillance System

PHA – Public Health Association

RR – Reportability Response