

V3.5 Agency Transition Checklist Recommendations

Creating & following a transition plan will assist in the conversion process and having a comprehensive checklist with room for flexibility is the key to an efficient and timely transition.

Pre-Transition Preparation

- Contact ePCR Vendor
 - Ask for readiness timeline (available & optimized)
 - What is the vendor's onboarding process & timeline
 - What prep work is needed before go-live or implementation?
 - What tools will be available and when will they be available for use?
 - Do you need to reserve a spot to start implementation?
 - Do you need to schedule trainings or meetings with the vendor?
 - Are there any resources available now from your vendor on transitioning such as User Information or User Guides?
 - Determine if/how the software will present the new Defined Lists created by NEMSIS to simplify field documentation for certain variables.
 - Symptoms, Impressions, Cause of Injury, Incident Location Type, Medications (Administered), Procedures
- Contact your State EMS Data Manager
 - Ask for State's EMS Registry's target Go-Live Date & timeline
 - Confirm when the State(s) to whom your agency submits data will be ready to begin accepting V3.5, and when they will stop accepting V3.4
- Communicate with Stakeholders with whom you exchange Data
 - Important for planning & to avoid delays. Share your transitioning timeline with them. Determine if there are any changes or issues that may affect your data exchange.
 - Common stakeholders affected
 - CAD, Billing, agency IT dept., Hospitals, ET3, ECG monitors, communication products (ex: Kno2Fax)
 - Other Agency stakeholders
 - Other EMS Agencies with whom your agency runs calls, especially if you transfer data between your systems.
 - Other exchanges to consider
 - Auto-Posts, HIEs, etc.
 - Data Exchange Alternate Strategies
 - Plan in case anything doesn't go as planned (communicate with Hospitals, Billing, etc.)

Transition Preparation

Data Collection Plan

- What information/data elements does your agency plan to collect?
 - Look at what AZ-PIERS requires, and what you want to collect in addition
 - Determine any gaps, changes needed
 - Resources: AZ-PIERS Change Log, NEMSIS Change Log, NEMSIS v3.4 – v3.5 Gap Analysis
 - Some changes may not apply to your agency.
 - Ensure vendor has built any required custom elements. (Same as V3.4)
 - Consider any changes you have been wanting to make in V3.4 (data element collected, data quality, etc.) so any changes occur together & be part of any trainings you will be holding for your V3.5 transition.
 - It may be helpful to pull some of your V3.4 data to find examples of values used in data elements that are changing in V3.5

Agency Dataset

- Agency Data Collection Setup
 - Compile Agency's V3.5 Dataset
 - Update your software dataset to ensure the data elements you want to collect are active, and activate any new values your agency will use. Ensure deprecated data elements & values are either inactivated or mapped on export.

Agency Setup

- Agency Run Form
 - Start to create an updated run form with the new data elements and remove any deprecated data elements. You can start with your current V3.4 form and make changes to a copy.
 - Make sure to add the custom required data elements
 - If you have any customized logic, tools, or viability rules, update accordingly
 - Update any customized triggers workflow (ex: autofill or buttons dependent on any data elements or values that are changing).

Transition Preparation

- Agency Business Rules/Validation & Closed Call Rules
 - You may want to build your rules together as you build your form so you can test as you go
 - Consider the new data elements & values as you review your validation rules
Consider the new data elements & values as you review your closed call rules.
 - If a copy of the State Validation Rules are available, you may want to review those while updating any existing or new rules.
 - Before go-live, your ePCR vendor will need to apply the NEMESIS Schema, NEMESIS Schematron & Arizona Schematron. These carry the national rules & state rules respectively and can affect an ePCR's ability to export from your system or import successfully into AZ-PIERS.

- Agency Training
 - Set (or update) your training timeline as needed to train for the updated ePCR documentation.
 - Confirm go-live date / date range and onboarding schedule with your vendor

- Agency ePCR PDFs
 - Update any Customized PDFs used to send patient information to stakeholders such as receiving hospitals & billing. Refer to what you are collecting in your V3.5 dataset, and if your hospital retrieves the PDFs from AZ-PIERS Hospital Hub, whether those data elements are included in your export to AZ-PIERS. Update your PDFs in AZ-PIERS as well if you want hospitals accessing them in AZ-PIERS for your agency to have specific formats.

- Agency Reports & Analysis
 - Update any critical reports in your report writing system
 - Update any dashboard feeds (ex: tableau or Continuum) if needed

- Agency QA Process
 - Update any QA forms, questions, logic, and reports as needed.

- Agency Tools
 - Update any Custom Incident List views, Checklists, Worksheets, etc.
 - Perform a quick review of any other tools or work-aides your agency uses.



Transition

Testing the System Setup

Preliminary Beta Testing

- Consider choosing one station, crew, or shift
- Take feedback, & update accordioning (run form flow, validation rules, other tools).
- May want to appoint one person to pass on feedback
- Communicate with your vendor regarding what you want included in your export files as to required and request data (AZ-PIERS, Billing, etc.)
- Sync your field devices as needed



Go-Live

Monitoring the System

Monitor Field / Crew Documentation Ease

- Consider appointing one person per each crew/station/shift to relay feedback.
- Now you will have several shifts/crews/stations on the system. Having one person per what ever subgroup you decide to use will help with efficiency and reduce repetitive feedback.

Monitor Exports

- Confirm your export criteria (ex: one at a time, resend if ePCR is updated or changed, a certain status or minimum validation score, time delay, etc.)
- Keep an eye on your exports (AZ-PIERS, Billing, etc.) & any returning messages such as issues, success, etc.)
- May want to track issues/requested changes in a central location and meet with vendor.



Follow Up

Ongoing Monitoring

Keep Monitoring for Data Submission Issues

- Review for failed exports, failed postings, no export attempted

Monitor for Validation Issues

- Review any weekly & monthly reports regarding validation issues.

General Suggestions

Don't...

- ...wait until the last minute to get started
 - Transitions almost always have some delays, challenges or interruptions. It is better to give your agency plenty of time to review the transition materials.
- ...if at all possible, make updates or changes right before the system admin will be out.
 - Don't make changes on Fridays, the day before a holiday, or when the system administrator will be out for a couple days.
 - It is better to make changes towards the beginning of the week.

Do...

- ...work with other agencies similar to your agency to build run forms, update tools & review data exchange configuration
 - Similarities like the same software vendor
 - Agencies with similar capabilities (ex: transporting agencies, air vs. ground)
 - Agencies who use the same CAD, Billing software, etc.
- ...communicate
 - with leadership, crews, training, medical direction
 - with partner agencies
 - with data consumers (receiving hospitals, CAD, billing, etc.)
- ...control access to your draft unfinished, untested run forms and tools
 - It is important to ensure crews do not use your V3.5 forms that are still in development and untested. The same with any other tools, reports, etc.
 - Your vendor or system admin may have the ability to set up a 'demo' or 'dev' agency in your system to keep developing tools out of your production/live environment.
 - A demo or dev environment should also allow you to enter test data and not risk any files inadvertently exporting (ex: to billing, AZ-PIERS, hospitals).
- ...develop an alternate/contingency plan in the event not everything goes as or when planned
 - Include plans for providing run forms for hospitals, patient information needed for billing, patient information usually transferred to other partner EMS agencies.