![HealthInfoNet logo]

BI-DIRECTIONAL PARTICIPANT ONBOARDING PROCESS

The purpose of this document is intended to provide organizations interested in participating in the statewide Health Information Exchange (HIE) with an understanding of the activities and resources involved in establishing bi-directional connectivity with HealthInfoNet's HIE systems.

Prerequisite: All organizations interested in participating in Maine's statewide Health Information Exchange (HIE) must complete HealthInfoNet's "Participant Interest Form:" https://hinfonet.org/what-we-do/become-a-participant/. Note that only organizations that are currently HIPAA-covered entities are eligible to participate in Maine's HIE at this time.

Processes & Workflows:

CONTRACTING **PROJECT KICKOFF & SCOPING** **TECHNICAL IMPLEMENTATION** **TRAINING & EDUCATION** **PARTNERSHIP & ENGAGEMENT**

Phase 1: Contracting

- Anticipated Timeline: 1-4 weeks

- Objective(s): Review and execute HealthInfoNet's Participant Agreement (PA) and Business Associate Agreement (BAA); review and confirm Fee Schedule.

- Milestone(s):
  - Provide contract terms and conditions of participation to interested organization
  - Provide fee schedule to interested organization
  - Discuss levels of service (e.g., scope of services, effective date for implementation and invoicing, etc.) with interested organization, as desired/requested
  - Execute contract terms and conditions of participation across all parties

Phase 2: Project Kickoff & Scoping

- Anticipated Timeline: 1-4 weeks

- Objective(s): Meet with interested organization – and its technical resources and vendors – to establish project roles and responsibilities among the teams, as well as to clarify and expand on technical specifications to inform detailed project requirements.

- Milestone(s):
  - Establish the following project roles/responsibilities for interested organization and/or its technical vendors: Executive Sponsor, Project Manager, Compliance Lead, IT Help Desk Specialist, EHR/Other Vendor Lead, Clinical Education Lead
  - Assess interested organization's/vendor's technical requirements and capabilities:
    - Define access connection options and capacity (e.g., VPN, VIP options)
    - Assess data-sharing capacity according to HL7 requirements

- Define scope of data-sharing functionality (e.g., EHR system technology/hosting/automation requirements)
  - o Review privacy and compliance regulations with interested organization:
    - Review requirements for "Health Information Exchange" in State of Maine statute
    - Define authorized end-user roles within the HIE's systems (e.g., Clinician, Auditor, and Help Desk user roles)

Phase 3: Technical Implementation

- Anticipated Timeline: 4-12 weeks

- Objective(s): Plan for and technically establish HIE connections and access points, including EHR interface connections, with interested organization.

- Milestone(s):
  - o Coordinate initial onboarding steps between HealthInfoNet and interested organization/vendor project management teams
    - Establish kickoff meeting and weekly project meetings
    - Coordinate secure connection with HealthInfoNet's systems
  - o Engage interested organization's technical vendor to begin integration activities
    - Establish EHR vendor interface
    - QA EHR interface in HealthInfoNet's Test environment
    - QA EHR interface in HealthInfoNet's Production environment (with interested organization collaboration and inputs)
    - Receive go-live acceptance from interested organization post environment QA
  - o Configure authorized end user accounts to the HIE's systems and provide necessary training and education materials to interested organization's end-user community

Phase 4: Training & Education

- Anticipated Timeline: 10-12 weeks

- Objective(s): Provide patient consent management and HIE system education and training opportunities to interested organization's end-user community.

- Milestone(s):
  - o Provide consent education with interested organization's Compliance Lead and other necessary privacy and compliance staff members
  - o Establish and confirm consent workflows have been established in interested organization's clinical routines
  - o Engage authorized end users to confirm user account creation process and access to the HIE's systems; provide additional education and training, as needed

Phase 5: Partnership & Engagement

- Anticipated Timeline: As-required per interested organization's input/engagement

- Objective(s): Provide continued service and receive end-user feedback from interested organization to continue to expand and enhance the HIE's services.

- Milestone(s):
  - Follow up with end-user usage statistics to ensure successful adoption of HIE services
  - Review initial follow-up training needs and end-user feedback
  - Provide ongoing training and re-education as needed; seek feedback and input regarding service enhancement and improvement opportunities