

Re-Onboarding Playbook: A Plan for Managing Vendor Changes and Maintaining Data Quality Over Time

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Trainers:

- Sophia Crossen, MS – CDC NSSP Contractor, InductiveHealth Informatics LLC
- Krystal Collier, BA – CDC NSSP Contractor
- Emani McCullough, BAsC – CDC NSSP Contractor, InductiveHealth Informatics LLC





Sophia Crossen, MS
Krystal Collier, BA
Emani McCullough, BAsC

CDC NSSP Contractor, InductiveHealth Informatics LLC



RE-ONBOARDING PLAYBOOK

A Plan for Managing Vendor Changes and
Maintaining Data Quality Over Time

December 7, 2022

NSSP Onboarding Team
Division of Health Informatics and Surveillance, CSELS





Introductions

Corey Cooper

Deputy Project Manager, CDC Contractor

Sophia Crossen

Onboarding Manager, CDC Contractor

Emani McCullough

Onboarding Coordinator, CDC Contractor

Krystal Collier

Onboarding Coordinator, CDC Contractor

Agenda



Overview of Onboarding: Gold Standard

Importance of Maintaining a Staging Connection

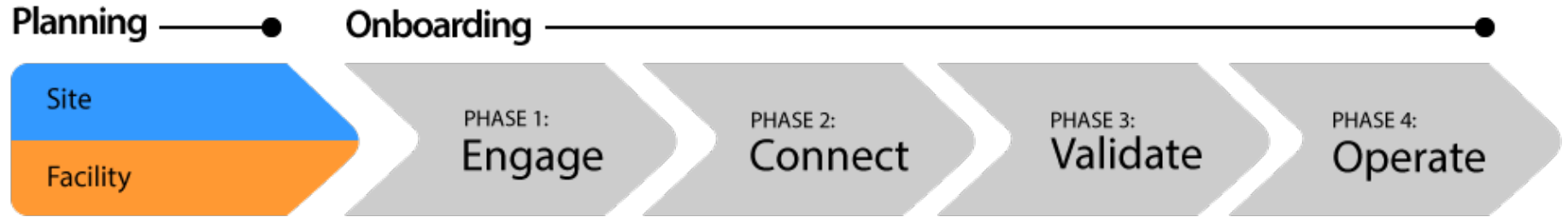
Re-Onboarding Reasons and Process

Discussion:

- Gold Standard for Re-Onboarding
- Acceptable Compromises to the Gold Standard
- Key Take Aways

Overview of Onboarding: Gold Standard

Onboarding Phases



NSSP Onboarding Overview Job Aid:

<https://www.cdc.gov/nssp/biosense/new-facility/overview.html>

Planning is Key!

- Identify the Key Players Early
 - Facility contacts
 - Vendors
 - Health Information Exchange (HIE)
- Always Have a Plan
 - Involve Key Players in the plan
- Never Assume
 - Assumptions lead to surprises



Importance of Maintaining a Staging Connection

Staging Connection Value

- Confirm technical details
 - Connection
 - Automation
 - Batching
- Review facility data during onboarding
 - Completeness
 - Validity
 - Timeliness
- Re-Onboarding



Challenges without Staging Connection

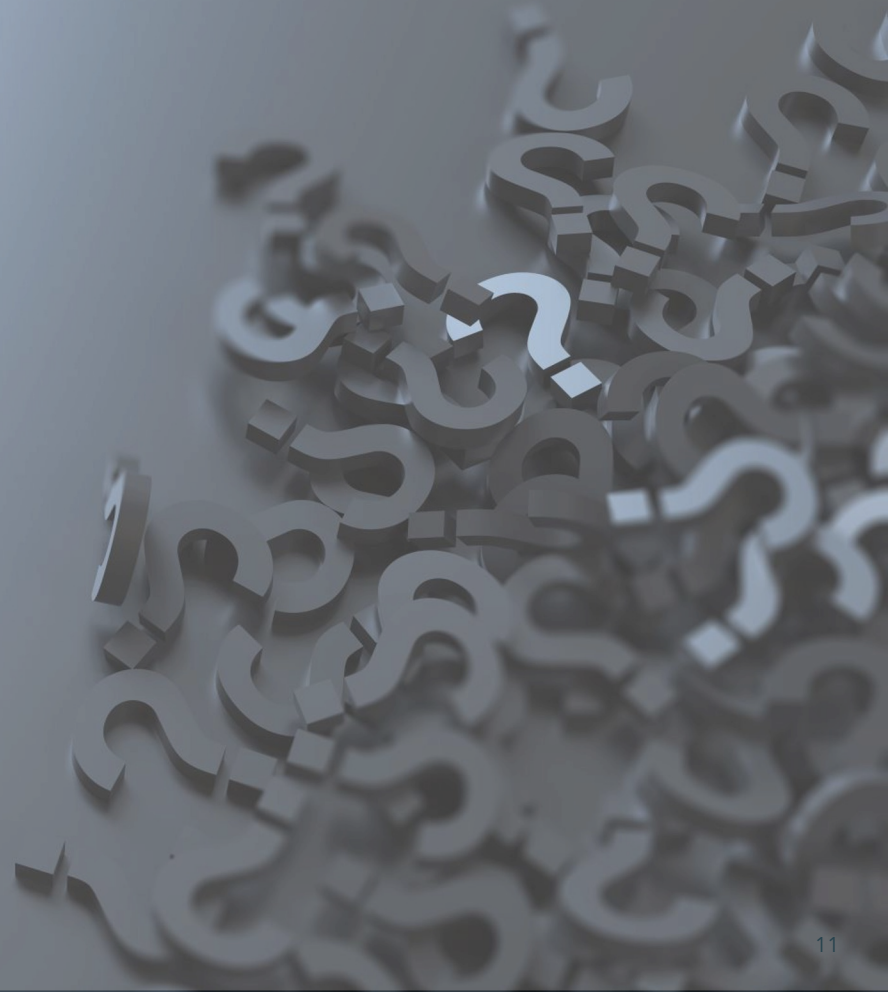
- Onboarding resources unavailable
 - Data Quality On Demand (SAS Studio)
 - Data Quality Dashboard
 - Stage ESSENCE
- Re-Onboarding



Re-Onboarding Reasons and Process

What is Re-Onboarding?

When a facility has a change to its data flow or an extended interruption for any reason, the data should be re-validated.



Re-Onboarding Reasons

- Facility changes or updates Vendor software
- Facility closes and then reopens
- New facilities added to the existing feed
- Data elements fixed or added to an existing data feed
- Cyber security attack

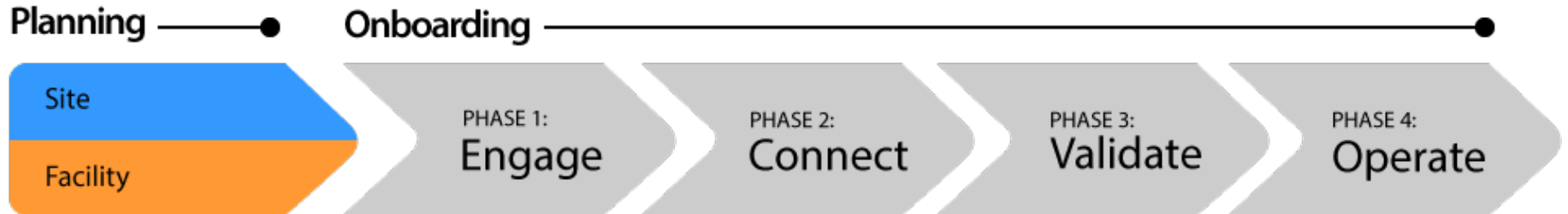


Re-Onboarding Process

Planning

Onboarding

- Engage
- Connect
- Validate
- Operate



Planning is Key!

- Identify the Key Players Early
 - Facility contacts
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 - HIE
- Always Have a Plan
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Discussion: Gold Standard for Re-Onboarding

Re-Onboarding Data Flow

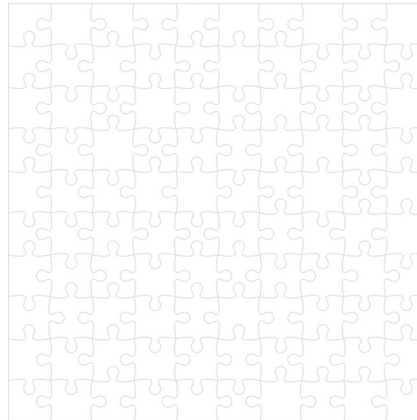


1. Minimize gaps in Production data
 - Send new data to Staging for validation
 - Be prepared to fill any gaps in Production data OR
 - Maintain production connection from old data feed/vendor (if possible/applicable)
2. Acknowledge gaps in Production data
 - Send new data to Staging for validation
 - Unable to backfill or maintain production connection
3. Continue sending data to Production for validation
 - All data sent to Exceptions
 - Less desired as most validation tools are unavailable
4. Other?

Re-Onboarding Validation

Similar process to initial onboarding validation

1. Data received in staging environment
2. No staging connection possible



Re-Onboarding Perspectives

What are your preferences for re-onboarding data flow and validation?

Why?

What are the short- and long-term tradeoffs?



Discussion: Acceptable Compromises

Common Compromises During Onboarding

- Timeliness of Diagnosis
- Batch Frequency
- Optional Data Elements
- Priority 2 & 3 Data Elements



Acceptable Compromise

What do you consider to be an acceptable compromise during onboarding?

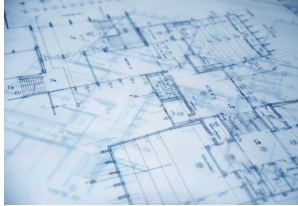
Why?

What are the short- and long-term tradeoffs?



Discussion: Key Take Aways

Take Aways



Identify
key players
early



Always
have a
plan



Never
assume



Questions?

CONTACT US:

NSSP Service Desk:

<http://support.syndromicsurveillance.org>

LEARN MORE:

CDC NSSP Website:

<https://www.cdc.gov/nssp/index.html>

REGISTER FOR NSSP UPDATE NEWSLETTER:

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For more information, contact CDC

1-800-CDC-INFO (232-4636)

TTY: 1-888-232-6348 www.cdc.gov

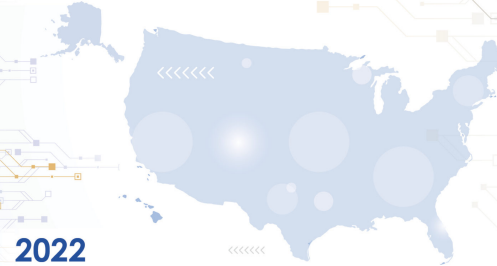


The findings and conclusions in this report are those of the authors and do not necessarily represent the official position of the Centers for Disease Control and Prevention.

National Syndromic Surveillance Program

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