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# JOINT DEVELOPMENT AND IMPLEMENTATION ADVISORY WORKGROUP

SUMMARY FINDINGS - EVALUATION

MARCH 3, 2017

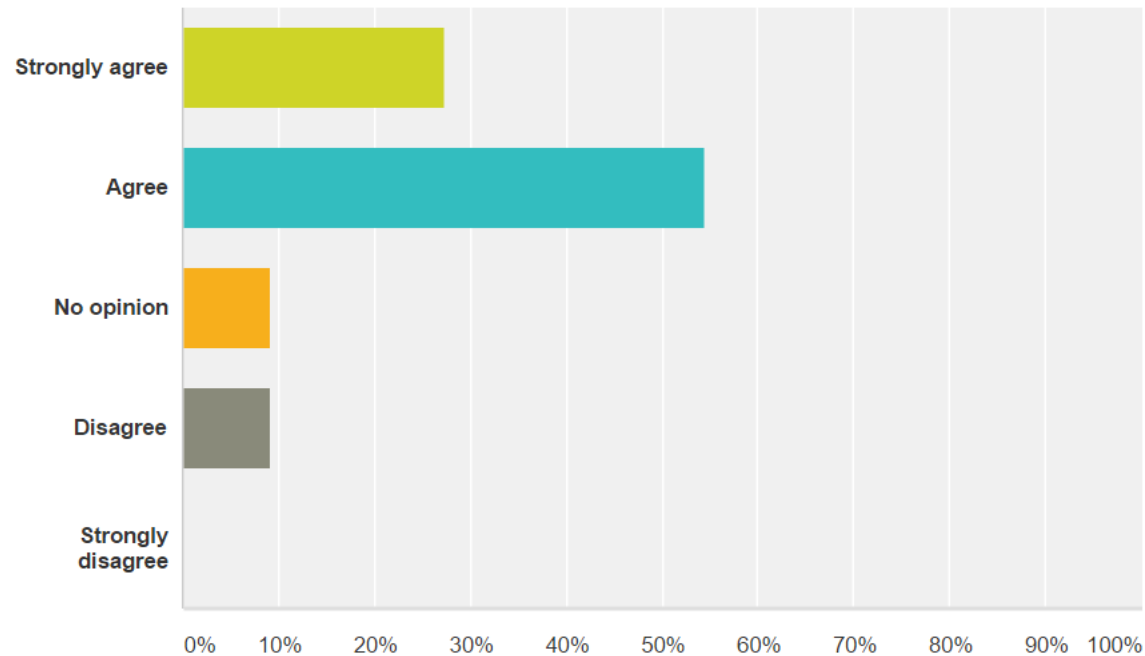


# BACKGROUND/CONTEXT

- An evaluation survey was sent out to all members of the JDI Advisory Workgroup to:
  - Evaluate the implementation of the Governance Framework and JDI Strategy Map
  - Solicit input on future directions
- 11 of 13 JDI Advisory Workgroup members responded (thank you!)



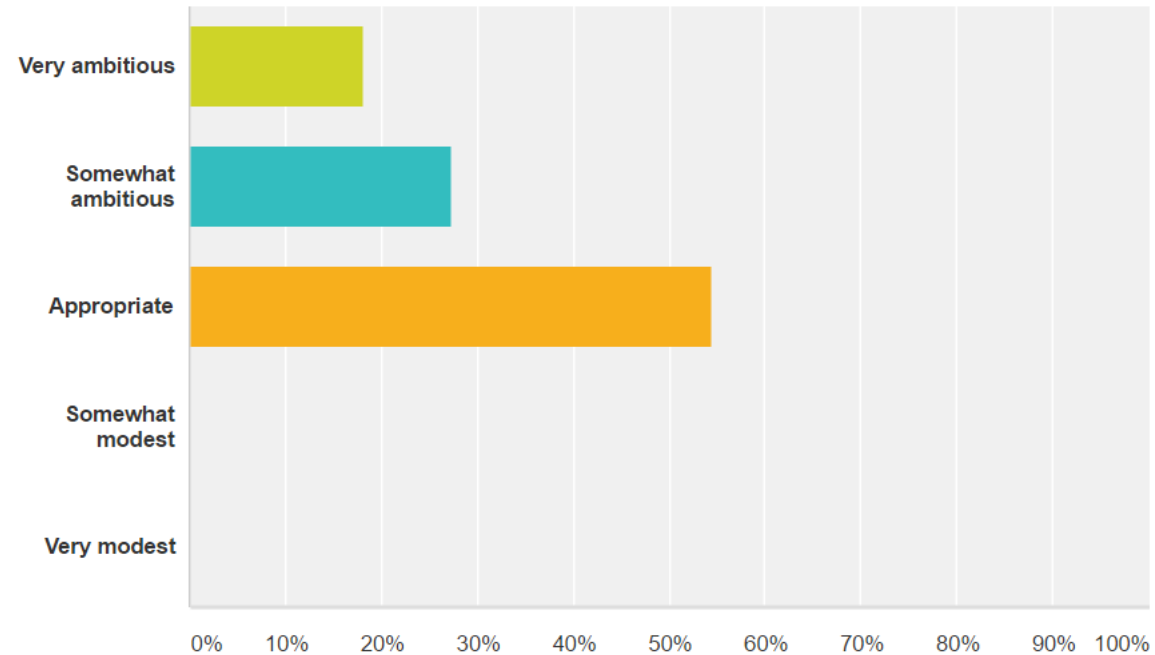
# THE GOVERNANCE DOCUMENT SET REASONABLE EXPECTATIONS OF SCOPE FOR THE JDI ADVISORY WORKGROUP



## Comments:

- Governance role is still forming
- Examples of possible projects are far-reaching, may not help us focus

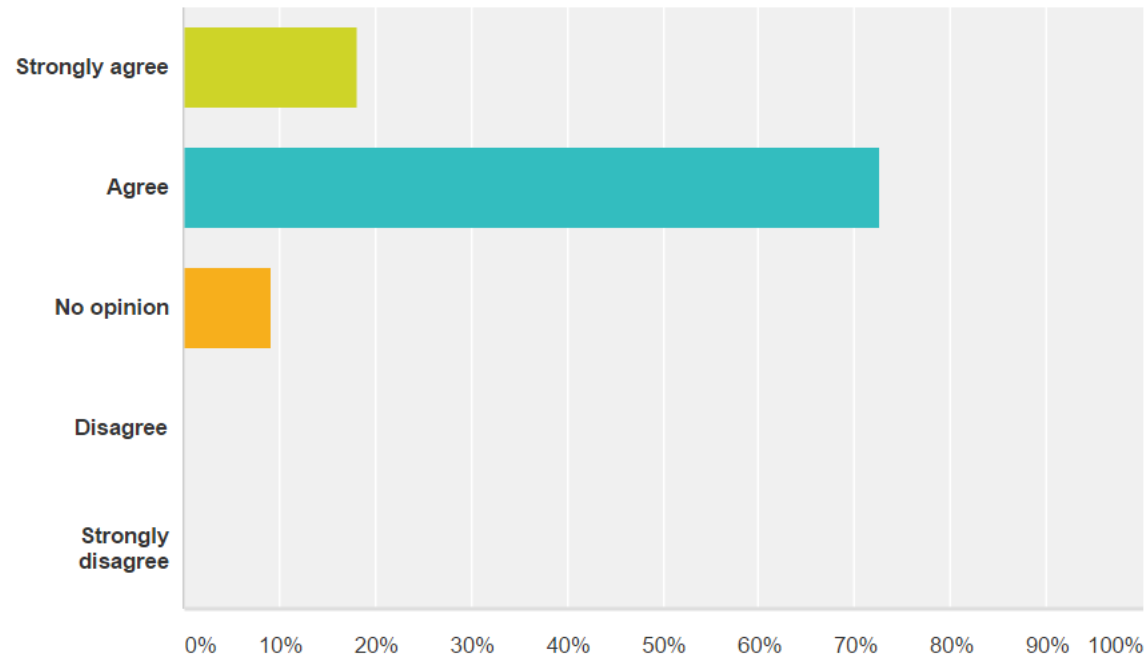
# ON THE WHOLE, THE EXPECTATIONS IN THE GOVERNANCE DOCUMENT WERE:



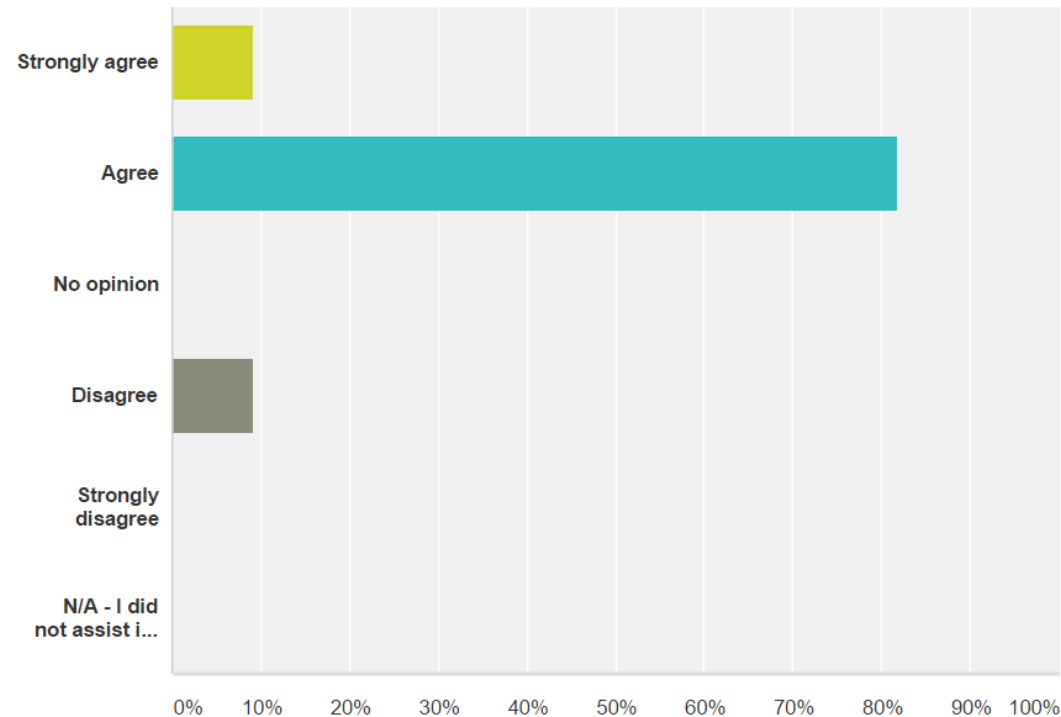
## Comments:

- Complexities of JDI across platforms may have been underestimated
- Collaborations across government and diversity of IIS applications present challenges, but JDI is very necessary

# THE GOVERNANCE, AS WRITTEN, HAS BEEN IMPLEMENTED SUCCESSFULLY TO DATE



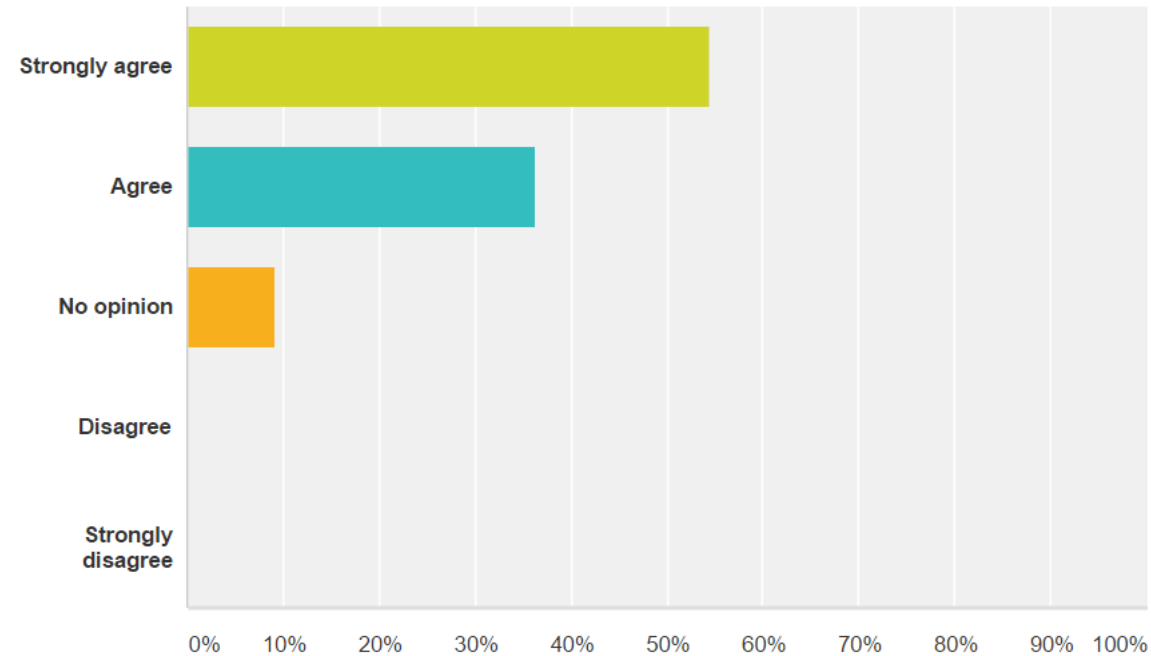
# THE SELECTION CRITERIA WE DEVELOPED AND OUR USE OF A SCORECARD WERE EFFECTIVE TOOLS IN SELECTING OUR FINAL PROOF OF CONCEPT PROJECT



## Comments:

- Don't believe we really "lived by" the scorecard results – ultimately selected project based on practicalities
- Hard to remember how this went

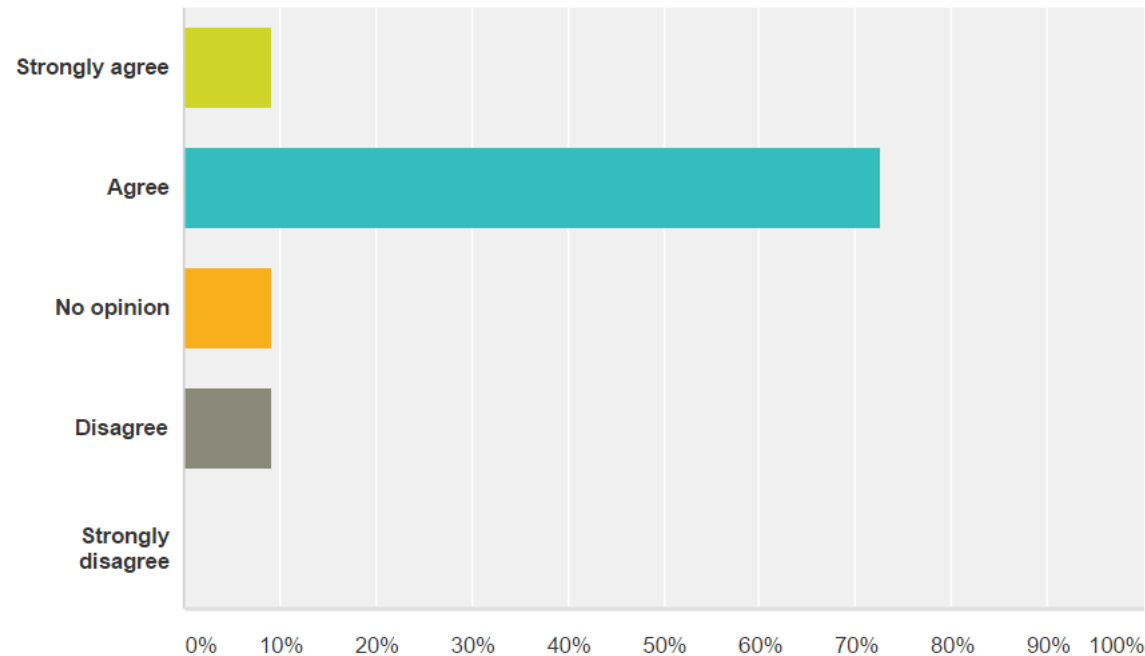
# AN APPROPRIATE AMOUNT OF SUPPORT HAS BEEN PROVIDED BY THE JDI PROJECT WORKGROUP AND AIRA STAFF IN THE VETTING AND PILOT PHASES OF THIS INITIAL PROJECT



## Comments:

- Great support, but some misses in ensuring IIS community understands the work and vision
- Perhaps only pilots can answer this

# THE SELECTED PROJECT WILL SERVE AS AN EFFECTIVE PROOF OF CONCEPT TO EVALUATE THE SUCCESS OF POTENTIAL JDI EFFORTS IN THE FUTURE

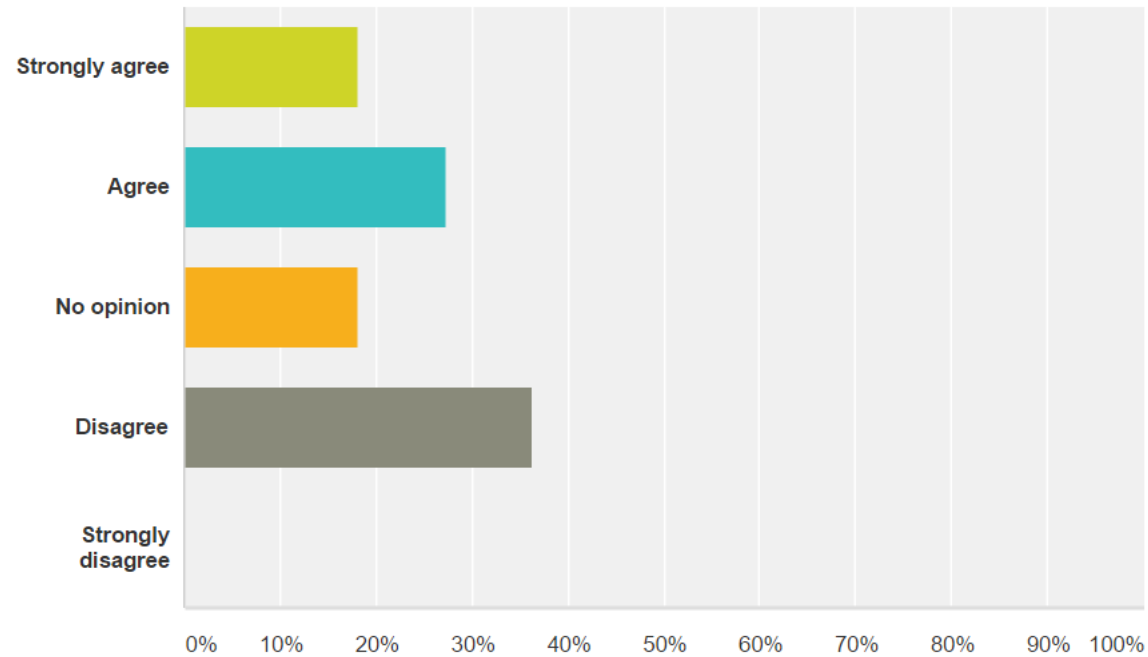


## Comments:

- For projects focused on implementation, yes, but less about joint development
- May be premature until POC is complete and we know if it's a success



# THE JDI ADVISORY WORKGROUP HAS EFFECTIVELY COMMUNICATED INFORMATION ABOUT THE ADDRESS CLEANSING/GEOCODING PROJECT TO THE COMMUNITY OF IIS PROGRAMS AND VENDORS

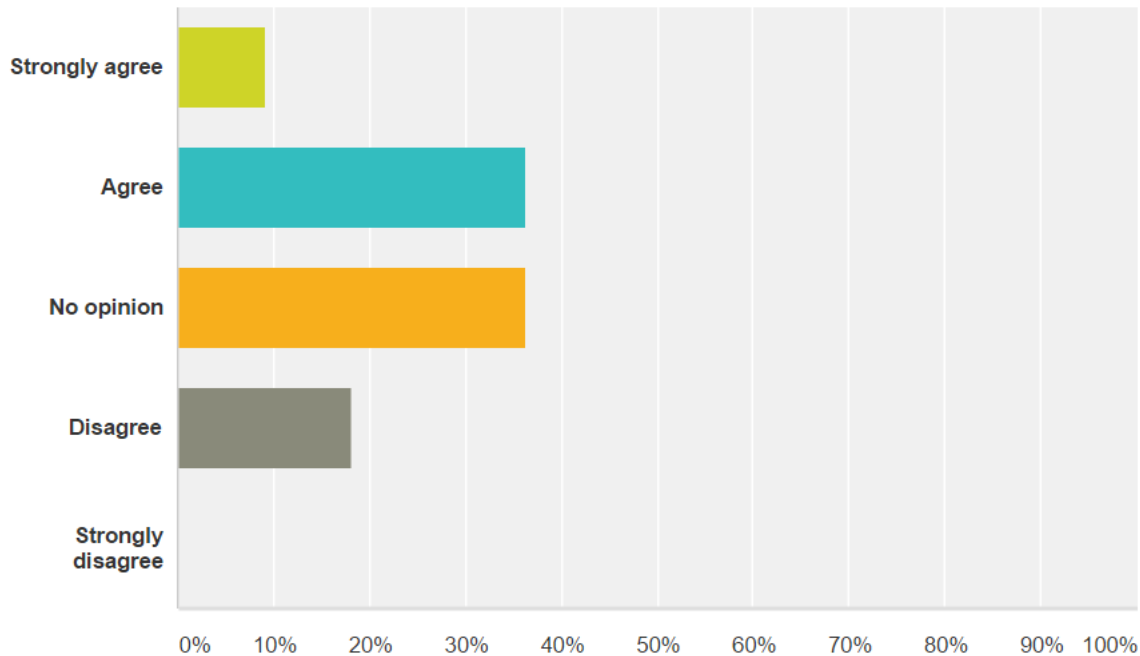


## Comments:

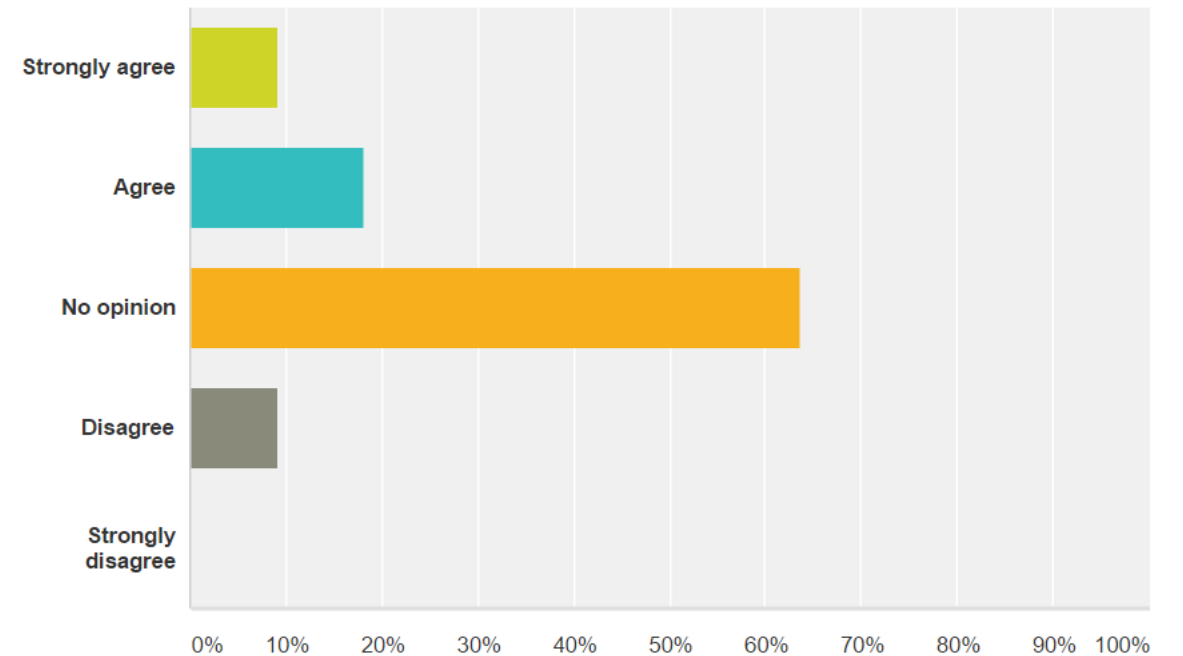
- There has been communication, but community has gaps in knowledge and understanding
- JDI should be included in every monthly update and SnapShots!

# GROUPS KNOW HOW TO ASK QUESTIONS ABOUT/SEEK OUT FURTHER INFORMATION ON THE ADDRESS CLEANSING/GEOCODING PILOT PROJECT

IIS Programs and Vendors:



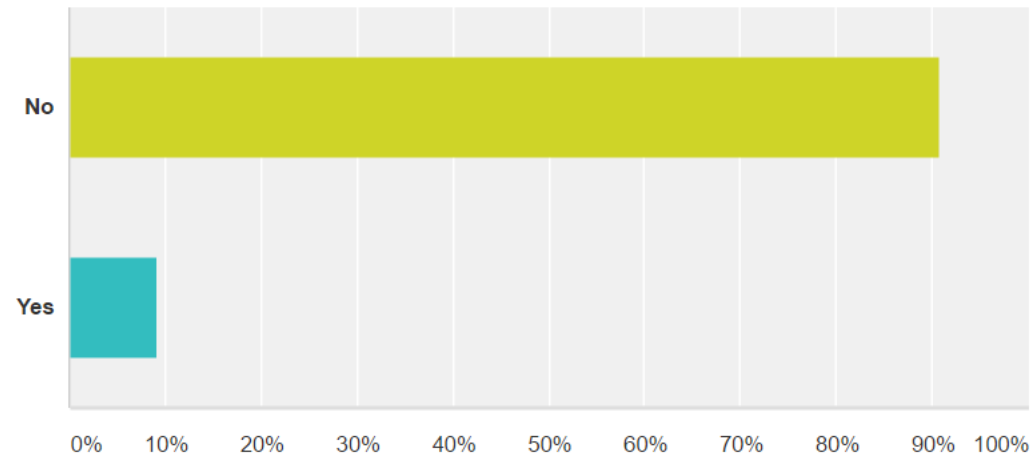
Partners and Stakeholders:



## Comments:

- Hard to say what anyone outside of the JDI group knows

# ARE WE FAILING TO ENGAGE ANY STAKEHOLDER GROUPS?



## Comments:

- Must be freshly considered with each project
- Not yet...
- We haven't engaged Central IT or provider/HIE partners

**WITHIN THE GOVERNANCE DOCUMENT, THERE WERE SEVERAL AREAS OUTLINED FOR POTENTIAL FUTURE DIRECTIONS. PLEASE RANK THESE IN IMPORTANCE FOR AREAS FOR THE JDI ADVISORY WORKGROUP TO CONSIDER, ON A SCALE OF 1-5, WITH ONE BEING MOST IMPORTANT (PRESENTED IN RANK ORDER)**

Develop a sustainability plan	2.10
Develop policies and procedures that support vendor engagement on common solutions	2.36
Develop recommendations on emerging IIS policy options (e.g., CDC Service Center model)	2.55
Consider and endorse other short and long term solutions, such as, subject matter decisions, technical decisions, policy and procedure decisions, and authority/access management decisions	2.73
Define and clarify a broader layered decision-making approach that strikes a balance among local state, and federal jurisdictions, and sets clear boundaries for the types of decisions needed	2.73
Address contracting, purchasing, immunization laws, and related issues affecting user jurisdictions	2.82
Develop communication/messaging to state and local government (and other) information technology communities	2.82
Define rules for adoption, deployment and support of third party products and services, including open source products	3.09

**Comments:**

- May need examples to clarify what we mean
- I'm more interested in projects than overarching concepts

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Data Quality Tools: Develop tools to expand standardized approaches to DQ	1.82
Patient Matching: Develop tools or guidelines to standardize deduplication	1.91
Interjurisdictional Exchange: Support the development of a strategic roadmap for implementation, addressing policy and technical aspects of voluntary IIS-IIS exchange	2.00
Vaccine deduplication algorithms: Develop stronger guidance for vaccine level deduplication	2.64
Record locator service for national consumer access or a service that allows IIS to locate records in other IIS: Develop requirements for national RLS	2.73
IIS open source tool development and stewardship: Support the development of governance, practical oversight, and storage of open source tools to benefit the IIS community (e.g., technical working group collectively developing DQA tool, etc.)	2.73
Immunization Forecaster Interface: Develop an interface to link IIS with existing forecasting options, including third-party/open source tools	2.82
IIS dashboards: Develop guidance and templates for provider dashboards to include coverage rates, low inventory warnings, etc.	2.91
AFIX-IIS Integration Support: Provide an IIS community-wide perspective and support for AFIX-IIS implementation to achieve greater consistency	2.91
Onboarding Testing Requirements: Develop requirements for a stand-alone testing platform for incoming HL7 messages or queries	3.00

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SMS text-based reminder recall notifications: Guidance to support mobile phone-based reminder recall	3.09
Influenza public health preparedness initiatives: Explore best practices for IIS supporting mass vax clinics or other flu-oriented projects	3.18
2D barcoding implementation: Support implementation of IIS ability to read 2D barcodes	3.27
Consumer Access: Develop guidelines for authentication and auditing	3.27
Onboarding Testing Tools: Develop tool(s) for stand-alone testing platform for incoming HL7 messages or queries	3.36
Interface/interoperate with SNS tracking systems: Share IIS data with SNS systems	3.73
Perinatal Hepatitis B case module: Develop module to track Hep B cases	4.18

**Additional Suggestions:**

- Requirements for test site for AFIX reports to ensure consistency (not sure this is our role?)
- Develop a self-assessment tool based on new functional standards

*Note: one respondent felt some of these may not be directly JDI (example: interjurisdictional?)*

# HOW SHOULD THE JDI ADVISORY WORKGROUP EXPLORE AND ADVOCATE FOR FUNDING AND FUND SHARING MECHANISMS?

- Need to ensure increased collaboration between IIS and Imm Services Branch, and align projects with AIM when possible
- IIS should contribute funding collectively, but not be turned away if they are unable to contribute
- Seek financial support from CDC (recognized as difficult right now)
- Group should focus on creating fund sharing mechanisms, but stay away from advocating for funding
- Explore assistance that allows states to participate without going through state purchasing mechanisms – GSA?
- Survey IIS on current funding situation, draft white paper detailing need for contributions from new/existing partners
- Form advocacy arm to support and provide TA for funding pursuit
- Project topics will dictate funding opportunities/strategies – difficult to discuss in the abstract

# WHAT ROLE (IF ANY) SHOULD THE JDI ADVISORY WORKGROUP PLAY IN SUPPORTING AND INFORMING DEVELOPMENT OF CDC'S SERVICE CENTER MODEL?

- Would like to see strong involvement/large role/significant influence of workgroup in this area (x3)
- Unsure of what the Service Center model is (x3)
- Provide guidance for projects to be funded and developed
- Assist CDC in understanding what services would be valuable for functionality/cost savings



## ANY FURTHER COMMENTS?

- Funding for maintenance and a mechanism to provide ongoing maintenance to JDI will become a primary concern
- This group should avoid areas of significant policy variation, and focus instead on technical solutions. Consider a partnership with MIROW to work on a dashboard – MIROW defines best practices, our group builds it.
- This is not easy – we need to be patient