# 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 Preperation

- [ ] 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 NEMSIS Schema, NEMSIS Schematron & Arizona Schematron. These carry the national rules & state rules respectively and can affect an ePCRs 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.