

Tasks: Project Flow
<b>Planning</b>
Participant has received executed agreement or addendum
Participant has engaged their EHR vendor to review and complete the CCD/CCDA Document Project Request Form
Participant has purchased interface/services from EHR vendor, VAR and/or hosting company as needed
Resource has been assigned by the EHR vendor, VAR and/or hosting company
Participant resource is assigned to the project
Preliminary call with CliniSync, EHR vendor and participant resource (technical)
<b>Prerequisites</b>
A CliniSync technical resource will request technical prerequisites. At this time, the appropriate resources should be provisioned access to CliniSync's secure site for submitting prerequisites that include sensitive data
EHR vendor will obtain and complete the ADT Assessment form and return it to CliniSync
The organization will obtain or provide their Assigning Authority Organizational ID (OID)
EHR vendor will collect and provide two weeks of sample ADT messages to send to CliniSync; CliniSync will run a pre-analysis of these messages to verify the samples meet the needs of CliniSync's technical vendor, Health Catalyst (HCI)
EHR vendor will collect and provide 10+ sample CCDs for CliniSync to review
Once prerequisites and samples have been successfully received, reviewed, and adjusted when needed, CliniSync will submit the project to HCI for build
Participant submits their updated Notice of Privacy Practices to CliniSync for review, CliniSync will collect user names from participant for Consent Tool access and schedule subsequent training (web-based)
<b>Scheduling</b>
Upon HCI's acceptance of the project, the ADT interface build will be scheduled (timeline for new project scheduling varies and may not be immediate)
<b>Build</b>
Participant's technical resource will complete and submit HCI's VPN form
VPN tunnel will be built by technical resources and connectivity tested between HCI and the vendor/participant's technical resource
HCI will build the ADT interface and the EHR vendor may also be building an ADT interface
Verify consent management has been finalized and training completed with the participant
<b>Testing</b>
ADT interface connections tested and validated between the technical resources
CCD testing will begin once ADT messages have been successfully contributed and validated (CCDs will fail if ADT messages are unsuccessful)
All parties will coordinate to identify and resolve issues found during ADT and CCD testing
<b>Project Wrap</b>
Project will move to Production to verify successful ADT and CCD contribution before considered "live"
Once live, the participant will be transitioned to CliniSync Support and complete the CliniSync project sign-off form
CliniSync contribution billing/fees will begin if this is a new contribution project (see contract for details) and a CliniSync Data Contributor Payment Form will be forwarded to collect additional information

### Additional Information:

- ✓ *CliniSync will coordinate the efforts of the project and record progress*
- ✓ *This type of project can be lengthy, especially if there are no current production level instances with the EHR vendor*
- ✓ *If participant also wishes to query and retrieve a CCD from CliniSync, this is a different type of project and should be discussed prior to technical kick-off with CliniSync and participant's technical resource*