

VTrckS

Program Managers Meeting

Agenda

2

- Welcome to VTrckS – Anjella Vargas-Rosales
- GAC Recommendations Update – Nathan Crawford
- Grantee Pilot Planning Feedback – Brad Prescott, Jan Hicks-Thomson, and Pejman Talebian
- VTrckS Functionality – Jeanne Santoli
- Pre and Post Go-Live Support – Paul Abamonte and Brad Prescott
- VTrckS Training Update – Harneyca Hooper
- Program Status – Lance Rodewald
- Other VTrckS Events – Paul Abamonte
- Question and Answers – Robert Swanson



Welcome to VTrckS

Anjella Vargas-Rosales

VTrckS Update

4

- Welcome!
- VTrckS Solution Development Milestones
- VTrckS Accomplishments to Date & Next Steps
- VTrckS Pilot Cutover
- Grantee Transition
- VTrckS Non-Pilot Deployment
- Lessons Learned

VTrckS Solution Development Milestones

5

2010

2011

Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar

Requirements Analysis

◆ 5/28

- VTrckS Requirements Analysis

Design

◆ 6/25

- VTrckS Design

Development

◆ 8/20

- Data Conversion
- Training Development

Testing

◆ 11/4

- UAT (9/22)
- E2E (11/4)

Implementation



- Training (12/3)
- Mock Conversions
- Cutover

**GO-LIVE
DECEMBER 13**

Operations and Maintenance

- Issue Resolution
- Post Go-Live Assessment
- Lessons Learned

VTrckS Accomplishments to Date

6

- Grantee Participation:
 - ▣ User Acceptance Testing (UAT) - Sept. 24
 - ▣ Pilot Grantee Training in Atlanta Conducted (Sept. 27- Oct. 1)
- End-to-End Testing (E2E) - Nov. 4
- Grantee Onsite Supplemental Training Scheduled (Nov. 8 - Dec. 2)

VTrckS Next Steps

7

- Pilot Cutover and Go-Live (December 13)
- Non-Pilot Deployment

VTrckS Pilot Cutover Timeline

8

November – December 2010

January 2011

~ 3 weeks prior to Go-Live

1 week prior to Go-Live

1 week after Go-Live

2 weeks after Go-Live

3 weeks after Go-Live

◆ SAP “Prod” System Freeze

◆ NOV 19

Last day for direct-ship or state-funded bulk orders

Prepare for Blackout Period

Legacy Blackout

Cutover Execution

Provider Order Blackout

DEC 8 - 10

3-day blackout for provider ordering to McKesson



**GO-LIVE
DECEMBER 13**

Interim Go-Live Support

Post Go-Live Monitoring and Support

Grantee Transition to VTrckS

9



- Mini Data Cleanup
- Role Definition Mapping
- End User Training
- Provider Readiness
- Grantee ID Proofing
- Technical Setup
- ExIS Interface Testing
- Execute Communications Plan

- Data Conversion
- Grantee Go-Live

- Provider ID Proofing
- Provider Data Converted / Created
- Implement Provider Transition Plan

VTrckS Non-Pilot Deployment Strategy

10

- The current deployment strategy is to implement several waves of grantees
- Wave dates, participants, and assignments have not been finalized

Lessons Learned

- Grantee involvement and preparation is essential, should continue, and will continue
- Pilot grantee feedback will be used to further enhance VTrckS
 - ▣ Pilot “pain points” are currently being addressed
- Pilot grantees will help with prioritization of future enhancements



GAC Recommendations Update

Nathan Crawford

GAC History & Purpose

13

- Started in July 2008
- “To ensure that grantee immunization program needs are well represented throughout the development of VTrckS”
 - ▣ By reviewing plans
 - ▣ By developing recommendations

GAC Membership

14

- Co-chairs: Jan Hicks-Thomson (WA) and Gary Rinaldi (NY)
- 49 members
 - 31 grantees
 - Leadership from Association of Immunization Managers (AIM) and the American Immunization Registry Association (AIRA)
 - CDC

GAC Subgroups

15

Grantee Advisory Committee

External Information System (ExIS)

Provider and Grantee Ordering

Reports

Data Conversion and Rollout

Contact Center Planning

Testing

Change Management
(training, education, etc.)

89 participants from 31 grantees

GAC Recommendations

16

- Summary of GAC recommendations for VTrckS Phase I functionality to be released on December 13, 2010

	Programmatic	Technical	Total
In Dec 13 Release	24 (89%)	23 (52%)	47 (66%)
Not in Dec 13 Release	3 (11%)	21 (48%)	24 (34%)
Total	27	44	71

.

Current Status of the GAC

- Original purpose of the GAC for VTrckS Release 1 has been accomplished
- With development of VTrckS Release 1 in the past, and with roll-on of the pilots imminent, it is appropriate to pause meetings of the GAC
- The GAC will remain paused until the time for making recommendations for future VTrckS enhancements

Grantee Involvement

18

- Your feedback, through participation in meetings and through submitting questions and comments via askvm@cdc.gov, remains critical to the success of VTrckS

Contact Info

19

Nathan Crawford
ncrawford2@cdc.gov
404.639.8242

Centers for Disease Control and Prevention
Immunization Services Division
Program Operations Branch



Grantee Pilot Planning Feedback

Brad Prescott

Pejman Talebian and Jan Hicks-Thomson

Massachusetts

21

Pejman Talebian, MA, MPH

Deputy Immunization Program Manager for
Policy & Planning

Massachusetts Department of Public Health
Division of Epidemiology and Immunization
305 South Street

Jamaica Plain, MA 02130

Tel: 617-983-6880 Fax: 617-983-6840

Email: Pejman.Talebian@state.ma.us

Washington State

22

Jan Hicks-Thomson, MSW, MPH

Vaccine and IP Registry Integration Unit Manager

Department of Health

Immunization Program CHILD Profile

P.O. Box 47843

Olympia, WA 98504-7843

(360) 236-3578

(360) 236-3590 fax



VTrckS: An ExIS Pilot Grantee Perspective

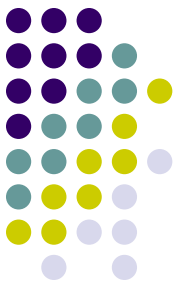
PUBLIC HEALTH

HEALTHIER WASHINGTON

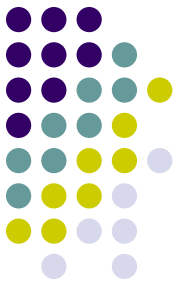
***Washington State
Immunization Program CHILD Profile
Program Manager's Meeting 11/2010
Jan Hicks-Thomson, MSW, MPA***

VTrckS Facts – A Pilot

Perspective:



- VTrckS is Necessary – VACMAN, VOFA and Excel spreadsheets don't cut it
 - ↑ CDC and Grantee contracting budget management and accountability standards
- VTrckS is New
 - There will be a steep learning curve
 - Workflows will be slower
- VTrckS is Mostly Off-The-Shelf SAP-ware:
 - New terminology, new work flows, and new steps required
 - VTrckS reporting will be robust
 - Data: organized in the system, generate spreadsheets and graphs
- VTrckS Spend Plan is Custom
 - New line of business for SAP – Old line of business for us



VTrckS – ExIS Interface:

- File specifications received for
 - Order, inventory, provider master data and shipping files.
- IIS upgraded to include new file specs
- Work-arounds identified “just-in-case”



**Provider Orders
Test File.txt ...**



**Provider Inventory
Test File..**

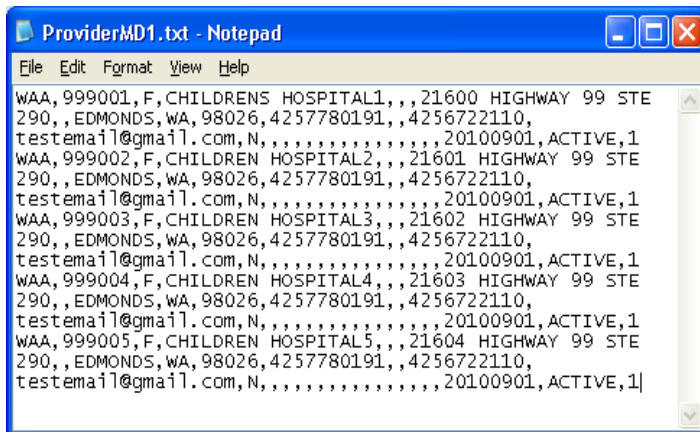
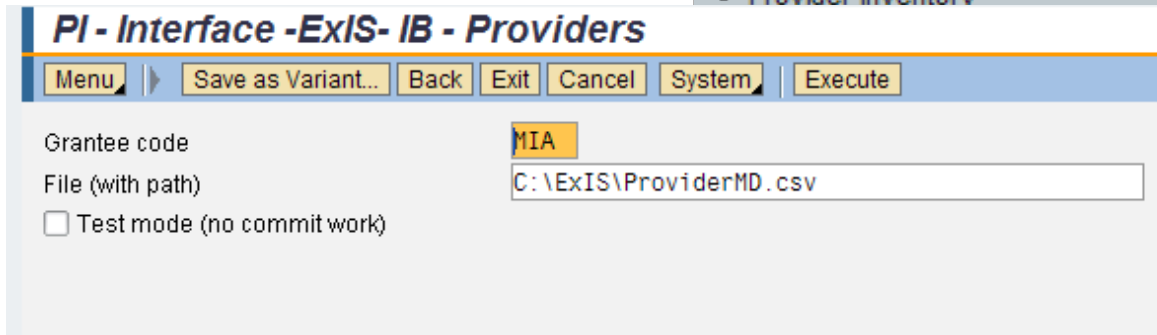
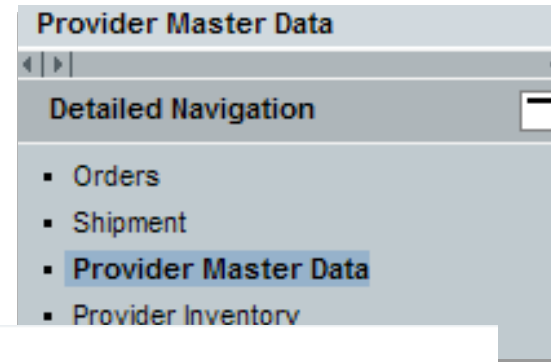
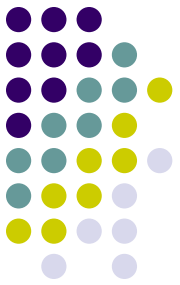


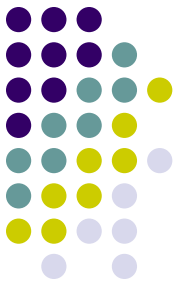
**Provider Master
Data Test File..**

Provider Master Data – Extra column; problem with military time
Inventory – the file uploaded successfully
Orders – the file uploaded successfully

VTrckS – ExIS Interface:

- Straight forward

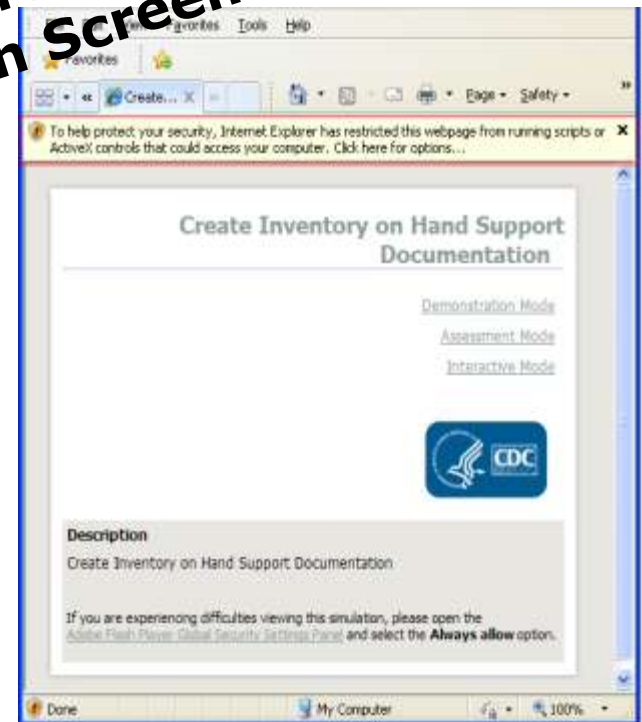
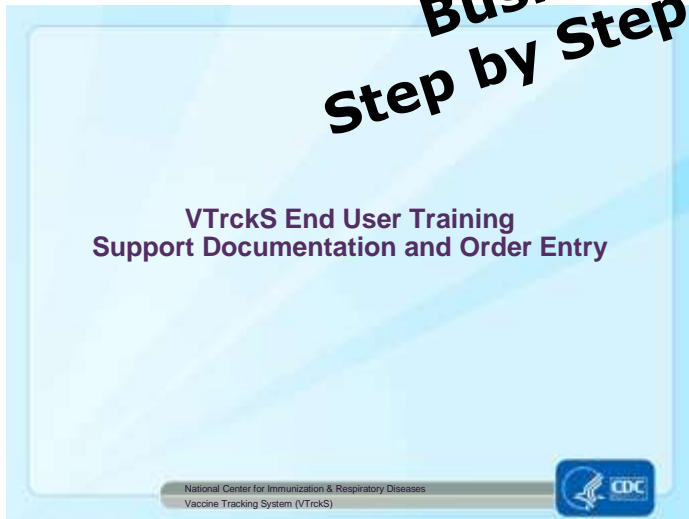


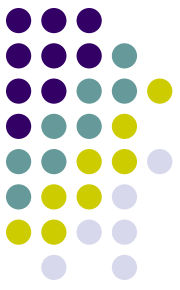


VTrckS Go-Live Preparation:

- The training materials are excellent
- A lot of work has already gone into:
 - Testing
 - Data cleaning and updating
 - Contact Center

**Business Process Procedures:
Step by Step Instructions with Screen
Shots**





VTrckS Go-Live Preparation:

- Over the next few weeks Washington will:
 - Complete web-based training
 - Have weekly check-ins with our VTrckS Analyst
 - Go over training materials and simulations
 - Access the testing environment for practice
 - Learn as much about VTrckS and how it works as we can
- At Go-Live:
 - We will receive distance support as needed
 - We plan to manually process some orders



PUBLIC HEALTH

**ALWAYS WORKING FOR A SAFER AND
HEALTHIER WASHINGTON**



VTrckS Functionality

Jeanne Santoli

VTrckS Functionality for Grantees, I

31

- Phased Approach for Pilots
- Provider Account Management
- Vaccine Management using Formularies
- Spend Plan Management
- Bulk Order Management

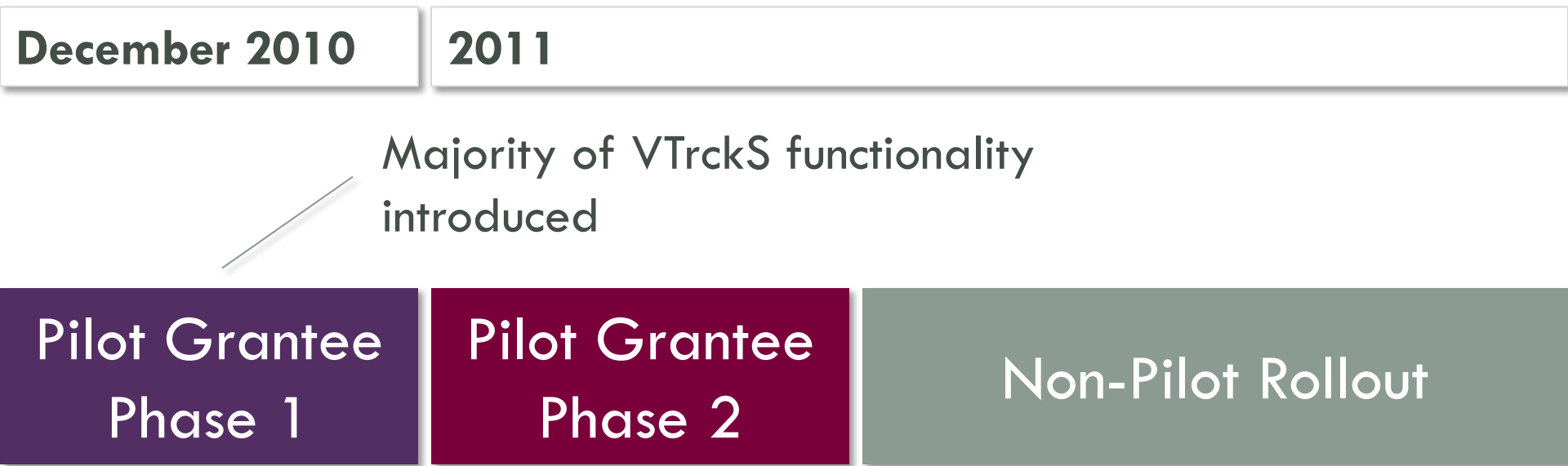
VTrckS Functionality for Grantees, II

32

- Provider Order Management
 - Provider Vaccine Requests
 - Product Selection
 - Business Rules for Order Entry
 - Provider Order Changes
 - Support Documentation
- Phase 2 for Pilots

Phased Approach for Pilots

33



Majority of VTrckS functionality introduced

Pilot Grantee
Phase 1

Pilot Grantee
Phase 2

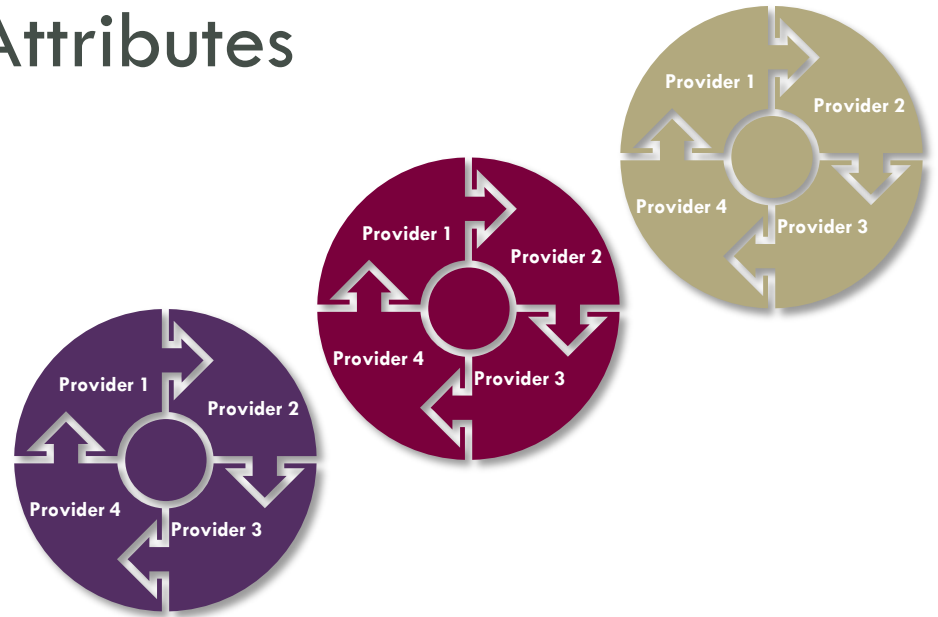
Non-Pilot Rollout

Additional VTrckS functionality introduced

Provider Account Management, I

34

- Set Up Provider Accounts
- Manage Provider Accounts
- Manage Provider Attributes



Provider Account Management, II

35

- Utilize Provider Attributes Tools

Mass Data Upload Tool

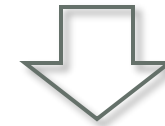


Returns Approval Required

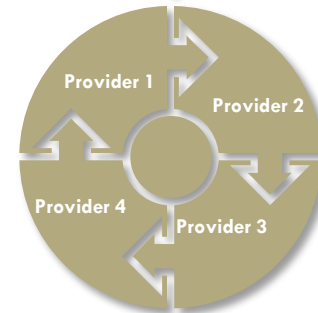


All Providers for Grantee

Mass Data Change Tool



Zip Code Change



Formulary Management

36

- Maintain Formulary Views
 - ▣ Provider will only see what they are allowed to order vs. entire list
- Manage Provider Groups
 - ▣ Birthing Hospitals
 - ▣ Flu Clinics
 - ▣ Pediatric Practices
 - ▣ Family Practices



Spend Plan

37

- Patterned after VOFA
- VTrckS orders verified against Spend Plan
- Automated warnings to grantees related to quarterly budget target and vaccines not included in Spend Plan
- Hard stop to grantees when orders exceed quarterly budget

Bulk Order Management

38

- Grantees can submit Local/State-Funded Replenishment (Bulk) Orders
 - ▣ On the CDC contract
 - ▣ Outside of the CDC contract (still requires order placement with the vendor outside of VTrckS)
- Grantees can check receipt of Local/State-Funded Replenishment (Bulk) Orders by distributor

Provider Order Management

39

- Provider Vaccine Requests
- Product Selection
- Business Rules for Order Entry
- Provider Order Changes
- Support Documentation

Provider Vaccine Requests

40

- Managing Provider Vaccine Requests
 - ▣ Vaccine requests placed by providers
 - ▣ Vaccine requests placed by grantees on behalf of providers

Product Selection

41

- Product Selection
 - NDC is currently the most specific way to select a product
 - Brand Name
 - Product Photos



Business Rules for Order Entry, I

42

- VTrckS checks the orders for grantee based on a checklist called Business Rules
- Option available to flag all orders for grantee review



Business Rules for Order Entry, II

43

- ALL orders for pilots (ExIS & Non-ExIS)
- Orders that do not meet the checklist will be flagged for grantee review
 - Examples:
 - Priority Orders
 - \geq \$25,000 Direct-Ship Orders

Business Rules for Order Entry, III

44

- Direct-Ship Orders
 - All orders flagged for grantee review
 - Required fields verified
 - Funding type must be selected
 - If funding type = State/Local, PO required
 - Checks doses and dollar values available on contract
 - Value of the doses ordered with the same ordering intention (pediatric or adult) cannot equal or exceed \$25,000

Business Rules for Order Entry, IV

45

- Order Intention
 - ▣ Intention reflects the age group that will receive the vaccine
 - ▣ VTrckS pre-populates adult, pediatric, or mixed
 - ▣ For vaccines that are mixed, you must select adult or pediatric before submitting order

Business Rules for Order Entry, V

46

- Budget
 - ▣ All vaccine orders are checked against grantee quarterly budget
 - ▣ Warnings occurs as grantee quarterly budget targets approach
 - ▣ Hard stop occurs if orders exceed grantee quarterly budget, requiring grantees to work with CDC to update the Spend Plan before approving the order

Business Rules for Order Entry, VI

47

- Other reasons a vaccine order would be flagged for grantee review include if:
 - ▣ Order is given a high priority
 - ▣ Orders submitted by a provider whose status is not active
 - ▣ Missing required information
 - ▣ Vaccine is on allocation
 - Allocation functionality will be handled by McKesson

Provider Order Changes

48

- Providers cannot make changes after submission to grantee
- Limited changes after submission to distributor
 - ▣ Cancellation of entire order
 - ▣ Cancellation of individual line items
- Slightly difference process than today
 - ▣ Call customer service at distributor
 - ▣ If order has not yet been processed, grantee enters cancellation in VTrckS

Support Documentation, I

49

- Inventory on Hand Records
 - ▣ Only support documentation required by CDC
 - ▣ Required fields include:
 - NDC
 - Number of doses
 - Lot number
 - Expiration date

Support Documentation, II

50

- Inventory on Hand – Order Entry
 - ▣ Provider required to submit within 14 days of placing an order
 - ▣ VTrckS will flag the order until support documentation is submitted

Support Documentation, III

51

- Additional grantee options:
 - Doses administered
 - Temperature logs
- Grantee selects required interval (1 day, 7 days, 14 days, etc.)

Phase 2 for Pilots, I

52

- Allocations and Special Circumstances
 - ▣ Supports two levels
 - CDC allocation across grantees
 - Grantees allocation across providers
- Visibility into allocation balances for CDC and grantees

Phase 2 for Pilots, II

53

- Communication with providers
 - ▣ Mass communication options will be available for messaging from the grantee to their providers
- Additional business rules will be available in Phase 2
 - ▣ Additional options for grantee to flag and review orders

Phase 2 for Pilots, III

54

- Recommended Order Quantity supplies provider specific analysis for grantee review
 - ▣ Considers provider statistics (annual need, inventory on hand, last order, etc.)
 - ▣ Provides recommended order quantity
 - ▣ Flags order if order exceeds recommended order quantity by a certain percent

In Summary

VTrckS functionality will support all key activities related to vaccine ordering and purchasing for publically-funded vaccine:

- ▣ Provider account/order management
- ▣ Spend Plan activities
- ▣ State bulk orders



Pre and Post Go-Live Support

Paul Abamonte and Brad Prescott

VTrckS Pilot Support Solution

57

- The VTrckS support solution accomplishes specific transition objectives:
 - ▣ To ensure knowledge transfer occurs between project team members and VTrckS end users
 - ▣ To provide optimal levels of support for both the initial go-live (interim period) and ongoing post production support
 - ▣ To ensure business operations are maintained

VTrckS Pilot Support Solution

58

- Support activities cover all phases of Go-Live

Pre Go-Live

(Go-Live minus 4 weeks)

- **Weekly Flash Calls**
- **E-mails**
 - Order blackout reminders
 - Go-Live support details
 - Training updates
- **VTrckS Training Library**

Go-Live

(Go-Live minus 4 days through Go-Live)

- **Weekly Flash Calls**
- Onsite support
- Update VTrckS Training Library
- Confirm refresher training requirements
- Contact Center/Super User network feedback

Post Go-Live

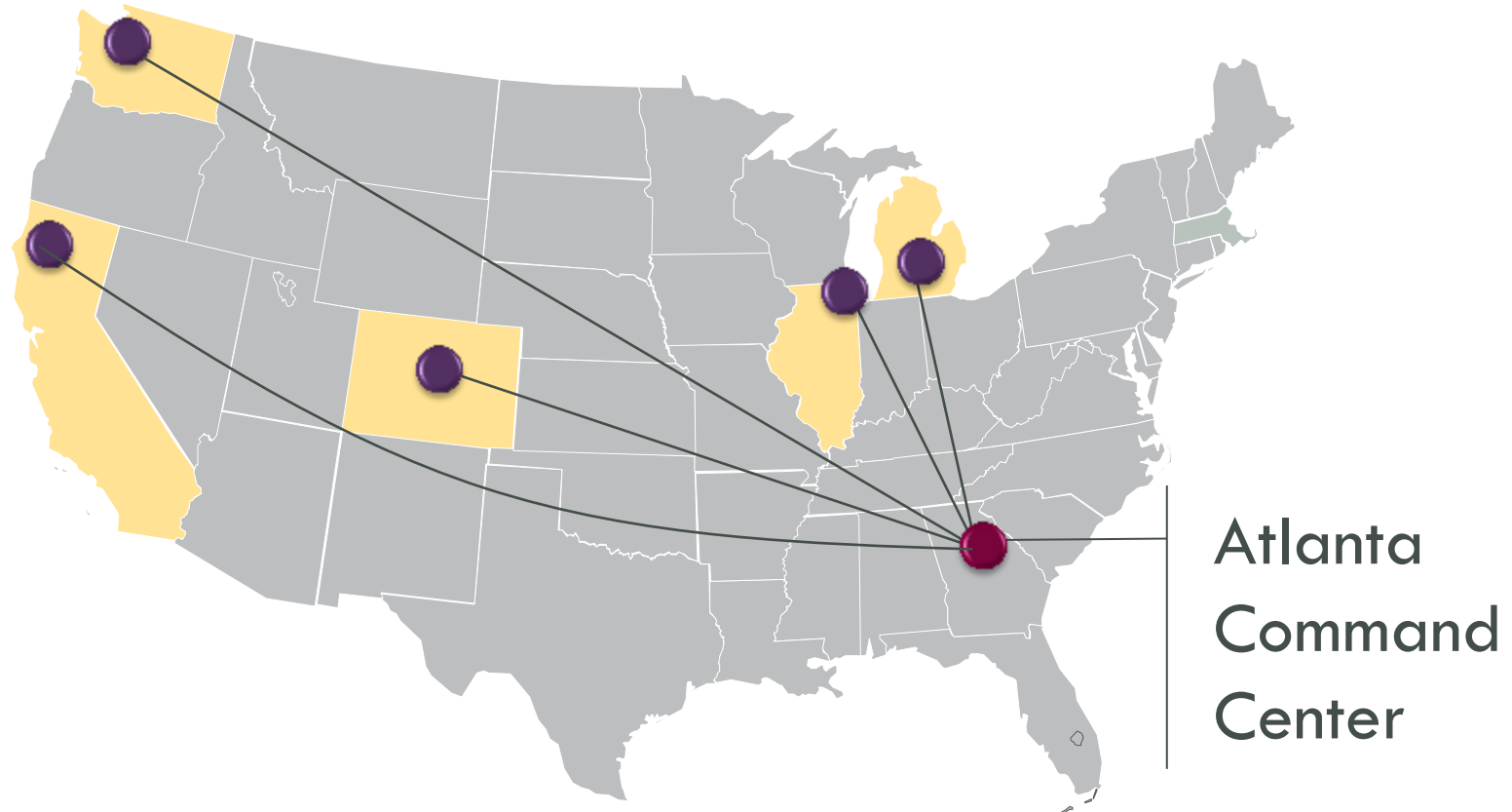
(Go-Live plus 6 weeks)

- **Weekly Flash Calls**
- **E-mails**
 - System Release Notification
 - Reminders to re-enter cancelled orders if needed
- **Calls**
 - Go-Live kickoff
 - Daily Cutover calls

Interim Pilot Support Solution

59

- Interim support will begin on December 13th and continue for as long as required



Interim Pilot Support Solution

60

VTrckS Project Team

Cutover Team

- Coordinates and monitors activities during cutover

Training Team

- Develops training material
- Conducts training

On-Site VTrckS Project Team

- Supports grantee in documenting and responding to any go-live issues

Central Command Center

- Coordinates go-live activities, issues, and resolutions for all pilot grantees

Contact Center

61

- After interim support is complete, the Contact Center becomes the primary source of VTrckS support

CDC's Vaccine Order Management Contact Center



Voice: 1-877-878-6247

FAX: 1-866-958-6247

TTY/TDD: 1-800-232-0038

Email: vaccineordermgmt@cdc.gov

Contact Center

62

Contact Center will resolve:

- **How do I?" questions:**
Answer all questions related to using VTrckS
- **Technical:**
Resolve any problems experienced using VTrckS
- **Tracking orders:**
Locate orders that have already been shipped by the distributor
- **"Where's my order?" questions:**
 - Answer general questions
 - Report an incident of a shipper not following the designated shipping instructions

Contact Center may be able to resolve:

- **Shipping Discrepancies:**
Some questions about discrepancies between original order, packing slip, and delivered product
- **Basic catalog (vaccine list) questions**

Contact Center

63

- The Contact Center **MUST** refer to other sources in certain instances

Temperature Issues

Questions for the Grantee Program Office

FluMist and VAERS-related questions



VTrckS Training Update

Harneyca Hooper

Grantee End User Training

65

- System role-based training
- Hands-on practice
- Increase knowledge, skill level, and confidence

Training Focus and Content

66

- Business impacts
- Future business process flows
- Step-by-step instructions for each transaction
- Simulations
- Preparation and support for provider training
- VTrckS help features and additional support



VTrckS Training Library

67

**Business
Process
Procedure
(BPP)**

Provides step-by-step instructions, including screen shots for executing system transactions

Simulations

Provides a recorded lesson, task-based tutorial

Job Aids

Provides step-by-step instructions on how to execute system transactions with no screen shots

Training Activities to Date

68

- Instructor-led training
 - ▣ September 2010
 - ▣ Representatives from all pilot grantees
- On-site supplemental training support
 - ▣ November / December 2010
- Distance Based Learning
 - ▣ Webinars (November / December 2010)
 - ▣ eLearning





Program Status

Lance Rodewald



Other VTrckS Events

Paul Abamonte

Know More about VTrckS

71

- VTrckS Handbook
- CDs of VTrckS Fact Sheets
- Breakout Sessions featuring VTrckS Demos
- VTrckS Simulations
- VTrckS Information Table
- Identity Proofing Table



Questions and Answers

Robert Swanson