**Checklist for MT DPHHS Electronic Case Reporting (eCR) Implementation**

* **Register intent of eCR implementation with MT DPHHS.**
* **Complete eCR implementation with your EHR Vendor, CDC eCR Onboarding Team, and APHL.** 
  + Complete all required EHR checklist items or testing scenarios.
  + eICRs must be formatted according to the [HL7 standards for electronic initial case report (eICR) for CDA or FHIR.](https://www.hl7.org/implement/standards/product_brief.cfm?product_id=519)
  + Implement triggering for all conditions (if EHR capable).
    - Download and implement the most recent condition code set from [eRSD](https://ersd.aimsplatform.org/#/home).
    - **MT DPHHS encourages all current and onboarding healthcare organizations or eligible providers to implement triggering for all conditions.**
  + Establish connection with APHL’s platform – AIMS.
  + Confirm successful receipt back of a Reportability Response (RR) after sending an eCR.
* **Schedule Soft Go-Live date with approval from CDC Onboarding Team, APHL, and all applicable PHAs.**
* **Complete Soft Go-Live and address issues identified in Data Quality (DQ) Monitoring Report.** 
  + During the Soft Go-Live the eCR testing team will run messages through the Data Quality (DQ) Schematron and provide a DQ Monitoring Report of the findings including any identified issues that need to be addressed.
* **Review DQ Monitoring Report and fix any necessary errors/problems.** 
  + Provide responses to identified issues back to CDC Onboarding Team.
* **Schedule a Go-Live date with MT DPHHS to start sending production eICRs.**
  + Coordination will require the approval of all involved PHAs.
* **Enter PHA Validation Phase after approval from CDC, APHL, and MT DPHHS for production data to be sent through the production feed.**
* **MT DPHHS eCR team conducts data quality evaluation of production eICRs and provides any necessary changes required before moving into production.** 
  + Review the **Data Element Priority List** to see what data elements will be evaluated for completeness and accuracy within eICRs during the PHA validation phase.
  + MT DPHHS will require an extend review period while preparing our surveillance system for eCR implementation into production.
* **MT DPHHS approves HCO eICRs to move into the production environment of our surveillance system, NBS.** 
  + HCOs **MUST** continue with manual reporting methods at this time.
* **Received formal email notification that manual reporting methods can be stopped for certain conditions.** 
  + Conditions will be validated and implemented in our surveillance system on a rolling basis.
* **Maintain standard of eICRs delivered to MT DPHHS.** 
  + HCOs are responsible for continuing to update the to the most recent Reportable Condition Trigger Codes (RCTC) from [eRSD](https://ersd.aimsplatform.org/#/home).
  + Failure to meet the data quality requirements may result in MT DPHHS requiring manual reporting methods to continue.

**Acronyms**

**AIMS** – APHL Informatics Messaging Services

**APHL** – Association for Public Health Laboratories

**CDA** – Clinical Document Architecture

**CDC** – Centers for Disease Control and Prevention

**CSTE** – Council of State and Territorial Epidemiologists

**eCR** – Electronic Case Reporting or Electronic Case Report

**eICR** – Electronic Initial Case Report

**EHR** – Electronic Health Record

**eRSD** – Electronic Reporting and Surveillance Distribution

**FHIR** – Fast Healthcare Interoperability Resources

**HL7** – Health Level 7

**MT DPHHS** – Montana Department of Health and Human Services

**NBS** – NEDSS Base System

**NEDSS** – National Electronic Disease Surveillance System

**PHA** – Public Health Association

**RR** – Reportability Response