



HIway 2.0 Migration Overview

July 2018



Hiway 2.0 and Clinical Gateway 2.0

- Hiway 2.0 Overview
- Hiway 2.0 Benefits
- Migration Process Highlights
- Migration Timeline and Milestones
- Important Information for Participants
- Q&A



Today's presenter



Kim Tuon-Mennella, PMP, CSM
Senior Technical Project Manager, Mass Hlway
Kim.Tuon-Mennella@MassMail.State.MA.US



Ryan Thomas
Manager of Professional Services
ryan.thomas@orionhealth.com

This presentation has been reviewed and approved by the Mass Hlway, and the presenters are acting as authorized representatives of the Mass Hlway.

The information provided in this presentation is for general information purposes only, and in no way modifies or amends the statutes, regulations, and other official statements of policy and procedure that govern access to and use of the Mass Hlway.



Overview of Hlway 2.0



- The Hlway team at EOHHS is working closely with Orion Health through implementation of a new Mass Hlway Direct Messaging System, also known as “Hlway 2.0.”
- Hlway 2.0 uses Orion Health Communicate, an EHNAC/DirectTrust accredited, cloud-based, Software as a Service (SaaS) solution that is an ONC 2015 Edition certified Direct Project, Edge Protocol, and XDR/XDM product.
- The upgrade to Hlway 2.0 was necessary to leverage the national standards for Direct Messaging that didn’t exist when the Hlway 1.0 was launched in 2012.
- Hlway 2.0 will make it easier for organizations to connect to the Mass Hlway and to exchange information with other health care organizations via the Mass Hlway.



- **DirectTrust Certification:** Using DigiCert secure certificates, HIway 2.0 has been accredited by the Electronic Healthcare Network Accreditation Commission (EHNAC) to join Direct Trust certified HISPs. The certification will expand the potential HIE network, as it provides connection to 25 HISPs used by providers in Massachusetts and over 120 accredited HISPs operating across the nation.
- **New Provider Directory:** The HIway 2.0 provider directory follows Healthcare Provider Directory (HPD) recommendations. This standardizes and simplifies the upload format to create a more seamless process to exchange health data and expand the directory beyond the state.
- **ONC 2015 Edge Protocol Certification:** This certification supports compliance with advance stages of Meaningful Use (now known as “Promoting Interoperability”)*.

* Reference: 42 CFR 170.315 Health IT Certification



- **Native support for multi-recipient messaging** is included with LAND and the new Connect Device software to improve ease of use.
- **Single-use certificate support** for all connection types improves security and increases interoperability with other HISPs.
- **Familiar User Interface:** Webmail and hardware device (LAND) users will see little change from the interface currently in use, requiring a minimum of technical intervention, while expanded features will be included.
- **Standardized XDR Direct Messaging:** HIway 2.0 will more easily integrate with existing EHR systems to handle messaging directly from systems providers are already using.
- **Federal Bridge Certification Authority (FBCA) compliance:** HIway 2.0 will now allow message exchange with federal agencies that require FBCA compliance.



- **The HIway team at EOHHS is working closely with Orion Health on the following:**
 - Setup the infrastructure and conduct testing of the environments
 - Migration of the Clinical Gateway (CG) nodes
 - Migration of the early adopters
 - Migration of all Participants from HIway 1.0 to HIway 2.0
 - A team member will be working with each Participant Organization throughout the migration process, including support for completion of the forms, testing efforts, and Production cutovers
 - Continue with onboarding efforts of new Participants to the Mass HIway
 - Operational support
 - Sunsetting HIway 1.0 after Participants' migration completes



Migration Process Highlights



- Migration of the Clinical Gateway (CG) nodes for Public Health Reporting is in progress.
 - **5** nodes have completed migration to production on HIway 2.0
 - **4** nodes are scheduled to be migrated
- The initial Webmail Participant migration into HIway 2.0 production was completed in June 2018, with the first LAND and XDR migrations scheduled for August 2018.
- The pilot sites, besides being the first into production, have worked carefully through the migration process and provided valuable feedback to help the HIway Migration Team improve the process as well as the instructions, forms, and other materials.



- **Initial Setup & Install of HIway 2.0 SaaS solution – Complete**
- **CG Node Testing and Pilot Participant Coordination – Complete**
- **Pilot Operations – June through August 2018 – In Progress**
 - CG nodes are being moved to production
 - Pilot Participant connections are being tested and moved to production
- **Migration Scheduling – June through September 2018 – In Progress**
 - Participant awareness campaign started in June 2018 with request for contact updates
 - Follow-up email sent in July with instructions and links to the below forms on the HIway 2.0 Migration website and a request for all forms to be returned by **August 31, 2018**
 - *Declaration of Identity (DOID) Form*
 - *Health Care Organization (HCO) Account Request Form*
 - Participants to be scheduled for migration based on the organization’s preferences, following verification of identity for the HCO Representative



- **Production Operations – starting July 2018 – In Progress**
 - All **new** Participants will be onboarded directly to HIway 2.0
 - Existing Participants will be migrated from HIway 1.0 to HIway 2.0
 - Migrations will take place in waves
 - Migration date will be set when registration and identity proofing is complete
 - HIway 1.0 will continue to operate in maintenance-only mode with no new enhancements or upgrades
- **HIway 1.0 Sunset – 1st Quarter 2019**
 - All existing Participants expected to be migrated from HIway 1.0 to HIway 2.0
 - HIway 1.0 will be decommissioned after all Participant migrations have completed



Thank You to the Participant Organizations Helping to Pilot Hlway 2.0!

The Hlway 2.0 Migration Team identified a number of active Participants that represent a variety of connection types and patterns to help pilot the migration process. We would like to thank them for their feedback and suggestions throughout the process.

- Migrated to Hlway 2.0 in June 2018:
 - ***Cape & Islands Plastic Surgery*** – *Webmail migrated to Communicate Webmail*
- Scheduled for Migration in August 2018:
 - ***Tufts Medical Center*** – *Test LAND migrated to Communicate Connect*
 - ***Boston Medical Center*** – *LAND migrated to Communicate Connect*
 - ***Holyoke Medical Center*** – *XPL migration to Communicate Direct XDR*
 - ***Massachusetts eHealth Collaborative*** – *XPL migration to Communicate Direct XDR*
- Migration to be Scheduled:
 - ***Cape Cod Health Care*** – *XPL migration to Communicate Direct XDR*
 - ***Emerson PHO*** – *XPL migration to Communicate Direct XDR*
 - ***Milford Regional Medical Center*** – *LAND migration to Communicate Connect*



Clinical Gateway Nodes



Domain names for the PRTST instance will be the only change for Participants. The PRTST environment will be called the CERT environment going forward. Participants will need to change their **SEND TO domain** as listed below.

The **Production domain** remains the same unless a change is desired by the Participants during the Hlway 2.0 migration activities.

CG Nodes	NEW Hlway 2.0 CERT environment SEND TO domain/URL by node	PREVIOUS domain/URL prior to the CERT cutover for the nodes
CBHI	cbhi@direct.cbhi.cert.masshiway.net	cbhi@direct.cbhi.prtst.masshiwaystage.com
ELR	elr@direct.elr.cert.masshiway.net	elr@direct.elr.prtst.masshiwaystage.com
MIIS	miis@direct.miis.cert.masshiway.net	miis@direct.miis.prtst.masshiwaystage.com
SYNDROMIC	syndromic@direct.syndromic.cert.masshiway.net	syndromic@direct.syndromic.prtst.masshiwaystage.com
*IEATS (OTP & TB)	ieats@direct.ieats.cert.masshiway.net	otp@direct.otp.prtst.masshiwaystage.com

*OTP is in the process of being revamped and going forward will be branded as Intake Enrollment and Assessment Transfer Service (IEATS).



Clinical Gateway Nodes



After extensive testing, the migration of the CG nodes to HIway 2.0 has been seamless for Participants, handled during scheduled maintenance downtimes with no system changes required by Participants.

CG Nodes	Names	CERT Cutover	PROD Cutover	Release notes
✓ MCR	<i>Massachusetts Cancer Registry</i>	5/11/18	5/18/18	Click here
✓ CLPPP	<i>Childhood Lead Poison Prevention Program</i>	6/13/18	6/29/18	Click here
✓ E-REF	<i>E-Referral Program</i>	7/2/18	7/6/18	Click here
✓ PMP	<i>Prescription Monitoring Program</i>	7/2/18	7/6/18	Click here
✓ ELR	<i>Electronic Lab Reporting</i>	7/11/18	7/20/18	Click here
CBHI	<i>Children’s Behavioral Health Initiative</i>	7/11/18	8/3/18	Click here
MIIS	<i>Massachusetts Immunization Information System</i>	7/27/18	8/10/18	Click here
SYNDROMIC	<i>Syndromic Surveillance Program</i>	8/18/18	8/24/18	Click here
IEATS (OTP & TB)	<i>Opioid Treatment Program and TB program</i>	8/22/18	8/31/18	Click here

Note: This is applicable to Participants who submit data to Public Health applications via the CG nodes. The CG nodes have been enhanced to be compatible with the latest standards. **For the PROD environment there is no action required by Participants as the migration is seamless.** The release notes outline the new, streamlined response messages that participants will see when engaging with the CG nodes.



What Migration to Hlway 2.0 means for current Participants

- **New verification and paperwork requirements for LOA 3**
 - Level of Assurance 3 (LOA 3) is the government standard for electronic authentication of identity required for health information exchange
- **Production Domain names and Direct addresses do not change (unless desired)**
- **Webmail to *Communicate Webmail***
 - Low Participant impact
 - Migration of mailbox data
- **LAND to *Communicate Connect***
 - Device and Usage review (replace old hardware if necessary)
 - Remote login and image update will be more common
- **XDR/XPL to *Communicate Direct XDR***
 - New certificate chain and personal certificate delivery
 - Participant installs certificates on their infrastructure



Required Forms

- 1. Identity Proofing, “Declaration of Identity for Direct Identity Verification and Authorization” (DOID) Form** - designates an individual with DigiCert as an authorized representative of the organization as the Healthcare Organization’s (HCO) Administrator.
- 2. Communicate HCO Account Request Form** – Participants will need to complete up to three (3) types of connection forms based on current settings (e.g. Webmail, LAND to be converted to Connect Device, XDR):
 - **Communicate Direct XDR HCO Account Request Form.**
 - Provides the Communicate Direct XDR supports connection for EHR and EMR systems that have integrated support for the Direct standards.
 - **Communicate Webmail HCO Account Request Form.**
 - A web-based secure mail solution within Orion Health™ Clinical Portal.
 - **Communicate Connect (LAND) HCO Account Request Form.**
 - A secure and scalable managed device that simplifies connection to the secure messaging network to send and receive encrypted healthcare information. This device was previously known as the LAND device.



Identity Proofing Process and Submission of Forms

- All Forms must be completed by the same person serving as the HCO Administrator.
- DOID Form also requires a notary signature. **DigiCert must speak with the notary to verify identity within 30 days or the form is invalid.**
- **HCO Form(s):** Complete forms depending on the current settings and connection required for HIway 2.0 for each organization.
- Send completed and signed DOID Form and HCO Forms **immediately after notary signature** to initiate the DigiCert verification process with one of these methods.
 - **Direct Message to(Preferred):** HIway2.0Migration@direct.hieadmin.masshiway.net
 - **Email to:** HIway2.0Migration@state.ma.us
 - **Regular mail to:** Attention: HIway 2.0 Migration Office
100 Hancock Street, 9th floor, Quincy, MA 02171
- Send the DOID Form and HCO Form(s) together but as separate documents (i.e. not a combined PDF).
- Incomplete forms (e.g. missing signatures or missing key organization information) will slow down the process and may require another notary signature as notary signature is only deemed valid for 30 days from the date signed.



Important Information for Participants



Sample DOID Form



DECLARATION OF IDENTITY (DOID) FORM FOR DIRECT IDENTITY VERIFICATION AND AUTHORIZATION

Service Provider	HISP Name: Orion Health on behalf of Mass HIway	Telephone: +1 800 905 9151
	Address: Evans Office Complex, Building C, Suite C-100, 7350 East Evans Rd, Scottsdale, Arizona 85260	Account #: 080088
Organization	Organization (Legal Business Name): Address:	Main Telephone:
	HIPAA Compliance: <input type="checkbox"/> HIPAA covered entity <input type="checkbox"/> HIPAA Business Associate <input type="checkbox"/> Other HIPAA Entity - Health-care organization that treats protected health information with privacy and security protections that are equivalent to those required by HIPAA.	
Applicant	Applicant Name:	Personal Telephone:
	Home Address:	Personal Email:
	Date of Birth:	
	Work Address:	Work Phone:
	Title:	Work Email:

By signing this document, I hereby 1) state that I am the Access Administrator (in accordance with Section 7 of the [Mass HIway Policies and Procedures](#)) or an authorized Officer of the Organization listed above; and 2) agree to the attached authorization, request a Direct Certificate and declare under penalty of perjury under the laws of the United

Sample HCO Form

Communicate Direct XDR HCO Account Request- Hlway 2.0 Migration

Communicate Direct XDR supports connection for Electronic Health Record (EHR) and Electronic Medical Record (EMR) systems that have integrated support for the Direct standards

This form should be completed by the Health Care Organization (HCO) Representative that has been identified or will be identified on the Declaration of Identity (DOID) Form for Direct Identity Verification and Authorization as "Applicant".

Organization Details

Please fill out a separate form for each organization requesting access to the HIE.

Legal Organization Name	Name of your HCO
HIPAA Compliance	<input type="checkbox"/> HIPAA Covered Entity <i>A Covered Entity (CE) performs medical services on the patient and has the most trusted access to Protected Health Information (PHI).</i> <input type="checkbox"/> HIPAA Business Associate <i>A Business Associate (BA) is someone who a CE uses for services and who needs access to the PHI of the CE's patients to perform some level of service.</i> <input type="checkbox"/> Other HIPAA Entity <i>Health care organization that treats protected health information with the privacy and security equivalent to those required by HIPAA.</i>
Address	Street Address Address Line 2 City Postal Code State Country
Main Telephone for the HCO	Country code - Area code - Phone number
Preferred Direct Email Domain	Name Your Production Domain Mass HIway Direct Address format for the Production Environment: direct.yourdomain.masshiway.net (you can keep your current domain address or provide a new one if you prefer)



Important Information about the DOID Form and Process



- The DOID Form must be filled out completely, signed and sealed by a notary.
- Identity proofing is a time sensitive process. **DigiCert must speak directly with the notary within 30 days of the notarized date to verify the applicant's identity or the Form is invalid.**
- The applicant must show proof of identity documents to the notary only. These documents do not need to be submitted to the Mass Hlway.
- Applicants must complete all fields on the Form.
- Read the instructions on page 3 of the DOID Form for full details before getting started.

INSTRUCTIONS TO APPLICANT/NOTARY:

Required identification consists of one original, unexpired Federal Government-issued Photo I.D. (List A)- OR- two unexpired Non-Federal Government I.D.s (List B and C), one of which must be a Photo I.D. (List B).

List A - Acceptable Federal Photo IDs include: a current passport, a permanent resident card, Global Entry or passport card, employment authorization document (Form I-766), a REAL ID driver's license/ID card, or a military ID card. *Driver's licenses and ID cards from non-REAL-ID-Act compliant states are allowed only under List B. See <https://www.dhs.gov/real-id-enforcement-brief>.*

List B - Acceptable Other Photo IDs, when presenting two unexpired non-Federal Government IDs (one of which must be a photo ID), include: a non-REAL-ID-Act-compliant Driver's License/state issued ID Card, a driver's license/ID card issued by a Canadian government authority, a School ID card with a photograph, a military dependent's ID card, Native American tribal ID card, or other ID card issued by a federal, state or local government agency, provided that it contains a photograph.

List C - Acceptable Secondary Forms of ID include, in addition to a photo ID on List B, include: a social security card, birth certificate, a recent utility bill, a recent financial account statement (redaction allowed), a carry permit, voter registration card, or other similar identity document.

Unacceptable forms of secondary ID include: any club/organization membership card (Elks, Sam's Club/Costco), library card, marriage license (except to establish new surname).

NOTE TO THE APPLICANT:

Only pages 1-2 of this Form will need to be submitted to the Mass Hlway. You will not need to submit copies of your identity documents to the Service Provider. These documents are for use by the notary only.

IMPORTANT INFORMATION FOR THE NOTARY:

DIGICERT MUST SPEAK WITH THE NOTARY DIRECTLY WITHIN 30 DAYS OF THE NOTARIZED DATE FOR VERIFICATION.

Please note the following:

- Please complete organization/employer, telephone, and email. DigiCert is required to contact you at your place of business to get a verbal confirmation of your signature and seal.
- The telephone number should be listed on a trusted third party source for ease of verification of the notary by DigiCert.
- DigiCert will attempt to contact you by phone at least once a day for 30 days from the date above from the following number: 801-701-9600.
- DigiCert may use email for notary verification only if the email address is verified on one of these two ways: 1) it is listed on a trusted third-party source; OR 2) if a contact reached by DigiCert at a verifiable number for the organization/employer listed gives the email address for the notary directly.



Important Information about the DOID Form and Process



- The Notary must sign, stamp, and fill out the Notarial Acknowledgement section completely. (Page 2)
- The identification section must be filled out completely, including serial or appropriate ID number. (Page 2)
- Make sure to use acceptable forms of ID. (Listed on Page 3).
- Applicant must sign Page 1.

SEE PAGE 3 FOR IMPORTANT INSTRUCTIONS TO THE NOTARY AND APPLICANT FOR COMPLETING THIS SECTION AND THE IDENTITY VERIFICATION PROCESS

Identification #1	Type of Document:		Photo: Y N
	Issued By:	Serial #:	
	Name on ID#1:	Expiration Date:	

Identification #2	Type of Document:		Photo: Y N
	Issued By:	Serial #:	
	Name on ID#2:	Exp. Date:	

NOTARIAL ACKNOWLEDGEMENT	
Notary must sign, date, and stamp this section.	
STATE/Commonwealth of _____ }	
COUNTY/PARISH OF _____ }	
I hereby certify under penalty of perjury under the laws of the United States of America that at the above-indicated date and time, personally appeared before me, the above-named Applicant, who signed the foregoing document in my presence, and who presented the identification listed above, affixed hereto, which I did review for authenticity.	
WITNESS my hand _____ and official seal Notary Signs Here	
Date and Time / / , : am/pm	
Print Name	Organization / Employer
Telephone:	Email:



Ready to get started? Get the Forms and Instructions on our website



Details including instructions and forms are available at www.masshiway.net

Full link: <http://masshiway.net/HPP/About/MassHlway2.0MigrationInformation/index.htm>

Path: www.masshiway.net —> About —> Hlway 2.0 Migration Information

Home > About > Mass Hlway 2.0 Migration Information

Mass Hlway 2.0 Migration Information

The new Mass Hlway Direct Messaging System, known as Hlway 2.0, will align the Mass Hlway with modern interoperability standards, simplify the connection process, and improve the user experience using the Orion Health Communicate solution. Orion Health Communicate is an EHNAC/DirectTrust accredited, cloud-based, Software as a Service solution that is an ONC 2015 Edition certified Direct Project, Edge Protocol, and XDR/XDM product.

The Hlway Operations Team will be migrating all Hlway Participants from the legacy Hlway to the new and improved Hlway 2.0 environment over the next several months.

Our mission is to streamline the migration process and ensure the implementation has minimal impact to business operations.

If you have any questions about Hlway 2.0 Migration, or you are a Mass Hlway Participant that is ready to get started, please email us at Hlway2.0Migration@state.ma.us.



What is Needed	Migration Process	CG Node Migration	Benefits	Resources	FAQs
----------------	-------------------	-------------------	----------	-----------	------



Contact Us for Help!



Please do not submit incomplete DOID or HCO Forms as this may slow down the process.

If you have need assistance in completing the Forms, or have any questions about the migration process, please contact us at:

Hlway2.0migration@state.ma.us

Commonwealth of Massachusetts
Executive Office of Health and Human Services



Q & A

Thank you!