



**California Health & Human Services Agency  
Center for Data Insights and Innovation  
Data Exchange Framework  
Data Sharing Agreement (DSA) Signing Portal Town Hall Transcript  
(11:00 AM – 12:00 PM PT, January 6, 2023)**

The following text is a transcript of the January 6<sup>th</sup> Data Exchange Framework Data Sharing Agreement (DSA) Signing Portal Town Hall. The transcript was produced using Zoom's transcription feature. It should be reviewed concurrently with the recording – which may be found on the CalHHS Data Exchange Framework website to ensure accuracy.

[Ethan K - Manatt Events] 14:00:25

Hello, everyone! My name is Ethan, and I'll be in the background answering any zoom technical questions.

[Ethan K - Manatt Events] 14:00:31

If you experience difficulties during the session, please type your question into Q, and A, we encourage you to submit written questions at any time using the Q.

[Ethan K - Manatt Events] 14:00:37

A. Should you wish to view close captioning? Please click CC.

[Ethan K - Manatt Events] 14:00:41

At the bottom of your zoom window to enable it or hide subtitles with that I'd like to introduce.

[Ethan K - Manatt Events] 14:00:46

Elaine Scoredakis, deputy director of Cdi.

[Elaine Scordakis] 14:00:49

Thank you, and good morning, everybody. Thank you for joining us.

[Elaine Scordakis] 14:00:53

My name is Elaine Cordakis, and I'm a deputy director at the Kellhs Center for Data insights and innovation or Cdi.

[Elaine Scordakis] 14:01:00

I, and we're excited to welcome you to the data sharing agreement signing Portal town call.

[Elaine Scordakis] 14:01:06

And just for your reference, this Town Hall will be recorded.

[Elaine Scordakis] 14:01:09

It'll be posted to the data exchange framework website along with the presentation slides for your future reference.

[Elaine Scordakis] 14:01:16

Today's presentation will focus on the data exchange frameworks, data sharing agreement, its policies, procedures and the data sharing agreement, signing portal.

[Elaine Scordakis] 14:01:25

If we go to the next slide, please. If at any point during the town of that town hall, please feel free to submit your questions to the Zoom. Q.

[Elaine Scordakis] 14:01:35

A function, at the end of the presentation. Our team will select questions from the Q.

[Elaine Scordakis] 14:01:41

A to be answered, live as time allows. Of course, if your questions are not answered during the session, and you'd like us to follow up with you, please submit it to the email address you see on the screen.

[Elaine Scordakis] 14:01:53

That's Cdi at chess dotcom.

[Elaine Scordakis] 14:01:57

Next slide, please. I'd like to introduce my colleagues today who you'll be hearing from today versus Olivia Tucker.

[Elaine Scordakis] 14:02:06

She's our Assistant Sheep Council, and then Dr.

[Elaine Scordakis] 14:02:07

Rimmer, who is our independent HIV. Consultant and subject matter expert, and then finally, Bob Jordan, who has been leading and helping us get the Dsa.

[Elaine Scordakis] 14:02:19

Signing portal launched. So with that, I'm oh, first let me go to the next line.

[Elaine Scordakis] 14:02:25

Go recap the agenda. Sorry about that. I was jumping ahead here, so we'll start briefly recapping our vision for the date exchange in California, and then we'll provide provide an overview of the data sharing agreement, go over the published policies and procedures that

[Elaine Scordakis] 14:02:41

We've already done provide and update on the procedures and policies that are currently under development, and then answer questions frequently asked questions that we as Cdi, I haven't been receiving about the data sharing agreement and the policies and procedures next we're gonna give you a nice

[Elaine Scordakis] 14:02:58

demonstration, or Bob Will, of the recently launched data sharing agreement signing portal.

[Elaine Scordakis] 14:03:04

He's gonna run through more of the frequently asked questions about the portal, and then finally, we'll close with a few minutes for Q.

[Elaine Scordakis] 14:03:12

And a at the end. And again, please use the zoom q, a.

[Elaine Scordakis] 14:03:15

Feature, so we can be sure to capture your questions and address those as time permit.

[Elaine Scordakis] 14:03:21

Probably the next slide, please. We we always like to go in the next slide, please.

[Elaine Scordakis] 14:03:28

We always like to start our our presentations. A webinar just reminding everybody what it is we're working towards.

[Elaine Scordakis] 14:03:33

And it's our vision is for every California and the health and human service providers and organizations that care for them will have timely and secure access to usable electronic information that is needed to address their health and social needs and a and enable the effective and equitable delivery of

[Elaine Scordakis] 14:03:52

Services, to improve their lives, and wellbeing. I always like to remind ourselves of that, and why we're working so hard at this so with that, I'm gonna turn it over to a Olivia, she's gonna give you some more information on the data.

[Elaine Scordakis] 14:04:03

Sharing agreement and the policies and procedures. Olivia

[Olivia Tucker] 14:04:06

Hi! I'm Olivia! Tucker. It's nice to be here next slide.

[Olivia Tucker] 14:04:12

Please. We'll begin with the Dxf.

[Olivia Tucker] 14:04:15

Dsa. And the policies and procedures next slide.

[Olivia Tucker] 14:04:20

Please as the mandatory mandatory data sharing agreement signing data approaches.

[Olivia Tucker] 14:04:25

We wanted to start with the basic question of what the data sharing agreement or the Dsa is the Dsa.

[Olivia Tucker] 14:04:31

Is a legal agreement that a broad spectrum of health organizations will be required to execute by January the 30 first, 2,023, which is in several short weeks.

[Olivia Tucker] 14:04:42

It requires data sharing. To begin by January thirty-first, 24, or January thirty-first 2,026, to depending on the participant type.

[Olivia Tucker] 14:04:52

Agreement is intended to facilitate data exchange between participants in compliance with applicable Federal and State law and the agreement sets forth a common set of terms, conditions, and obligations to support real-time access to or exchange of health and social services information between and amongst

[Olivia Tucker] 14:05:13

Participants. It's important to note that the Dsa is not intended to replace or to supersede any existing or future agreements between signatories that provides a more extensive data exchange than the Dsa next slide please

[Olivia Tucker] 14:05:28

We get a lot of questions about who has to sign the Dxf. Dsa.

[Olivia Tucker] 14:05:32

By January the 30, first 2,023.

[Olivia Tucker] 14:05:36

So on the screen you'll see a list of required signatory types.

[Olivia Tucker] 14:05:40

And this list can also be found in assembly Bill 133.

[Olivia Tucker] 14:05:45

And there is a Dsa. Frequently asked questions. Document, posted on the Dxf website to help provide more guidance.

[Olivia Tucker] 14:05:52

This list includes organizations that are required to begin sharing data. By January the 30, first, 2,024, and January the 30, first, 2,026. Next slide, please

[Olivia Tucker] 14:06:06

Signing the dxf. Dsa. Additional information.

[Olivia Tucker] 14:06:09

Mandatory signatories are legally required by Assembly Bill 133, to execute the Dsa.

[Olivia Tucker] 14:06:16

By January the 30 first 2,023 voluntary signatories, such as county health, public health, social services, and other organizations, are encouraged to sign, if they are able to comply with its provisions and associated policies, and procedures and may do so after January the 30

[Olivia Tucker] 14:06:36

first, 2,023 for all signatories, the Dsa.

[Olivia Tucker] 14:06:39

Is a final state document, and must be someed as a drafted.

[Olivia Tucker] 14:06:44

All signatories should continue to monitor the development of policies and procedures through the coming months.

[Olivia Tucker] 14:06:50

Next slide, please.

[Olivia Tucker] 14:06:54

The published policies and procedures that are currently available are a set of 8.

[Olivia Tucker] 14:07:01

The first set of 8 Pmps were published in July the twentieth, 22, and our listed in this chart you see on your screen.

[Olivia Tucker] 14:07:10

The first is the amendment of the Dsa.

[Olivia Tucker] 14:07:12

Which sets forth processes for amending the Dsa.

[Olivia Tucker] 14:07:16

The the second is the development and modifications to policies and procedures which sets forth the process for developing new Pnps and modifying existing Pmps.

[Olivia Tucker] 14:07:27

The third is breach notification, which sets forth the definition of what a breaches and the obligations of participants in the event that a breach occurs, including breach, notification, timelines.

[Olivia Tucker] 14:07:39

The next one is permitted, required, and prohibited purposes which sets forth the purposes for which participants shall, may and may not exchange health and social services.

[Olivia Tucker] 14:07:50

Information under the Dsa.

[Olivia Tucker] 14:07:53

The next one is the requirement to exchange health and social services, information, or a Hssi which sets forth the requirements for participants to exchange Hssi and includes the dates that participants are deemed technologically ready and aid and are required to exchange the

[Olivia Tucker] 14:08:11

Sixth pnp. Is the Privacy and security safeguards which sets forth the privacy, standards, and securities safeguards that a participant must comply with in connection with the exchange of Hssi under the Dsa.

[Olivia Tucker] 14:08:25

The seventh is individual access services which sets forth requirements for participants to provide individual users or their personal representatives.

[Olivia Tucker] 14:08:34

Access to the individual users, Phi or protected health Information or Pii personally identifiable information. And the last is the data elements to be exchanged which sets forth the data elements that participants must make available for exchange at a minimum next slide please

[Olivia Tucker] 14:08:54

We also have several pnps that are currently under development, and they are listed on your screen here.

[Olivia Tucker] 14:09:00

The first is information blocking, which prohibits all participants from undertaking any practice likely to interfere with access, exchange, or use of health and social services.

[Olivia Tucker] 14:09:11



Information. The second is real time data exchange, which sets forth the definition of real-time data exchange and the associated obligations of participants.

[Olivia Tucker] 14:09:22

The third is early exchange, which sets forth requirements for participants using the Dsa.

[Olivia Tucker] 14:09:29

To engage in early exchange of Hsi. For example, exchanging Hssi prior to the statutory Lemma dates by which many entities must be in exchanging data.

[Olivia Tucker] 14:09:39

The fourth is the technical requirements for exchange which sets forth data, exchange patterns for the Dxf.

[Olivia Tucker] 14:09:47

And those that participants must support at a minimum as well as the technical specifications that participants must adhere to for each of the required transaction patterns.

[Olivia Tucker] 14:09:58

The next one or the next one is monitoring and auditing the scope of this Pnp.

[Olivia Tucker] 14:10:05

As well as the qualified Hio program. Pmp.

[Olivia Tucker] 14:10:08

Are both under consideration. By Cdii and our advisors.

[Olivia Tucker] 14:10:12

The status column that you'll see on your screen on this table indicates when these pnps were, or will be, discussed by the implementation Advisory Committee or the Isc.

[Olivia Tucker] 14:10:25

And the data sharing agreement policies and procedures.

[Olivia Tucker] 14:10:26

Subcommittee, and when Cdi. I expect to release them for public comment.

[Olivia Tucker] 14:10:31

Please keep in mind that the future dates are tentative and subject to change.

[Olivia Tucker] 14:10:36

Next slide, please.

[Olivia Tucker] 14:10:39

These are some of the frequently asked questions that Cdi has received about the data sharing agreement next slide. Please

[Olivia Tucker] 14:10:51

Next slide, please.

[Olivia Tucker] 14:10:54

Great. Thank you. The first question that we see a lot asks whether all mandatory signatories are required to sign the Dsa.

[Olivia Tucker] 14:11:05

By January the 30, first, 2023, including those identified in Assembly Bill, 133, who are not required to exchange data under A.

[Olivia Tucker] 14:11:13

B, 133 until January 30, first, 2026, under Assembly Bill 133.

[Olivia Tucker] 14:11:20

All mandatory signatures. Parties must sign the Dsa.

[Olivia Tucker] 14:11:23

By January the 30 first 2,023.

[Olivia Tucker] 14:11:25

That is not a negotiable date. Some of these organizations, such as smaller physician practices and clinics, rehabilitation long-term, acute psychiatric and critical access hospitals, and smaller rural acute care, hospitals will have until January

[Olivia Tucker] 14:11:45

First, 2,026 to fully implement the data exchange framework, even though they signed the agreement in January 2,023.

[Olivia Tucker] 14:11:52

The next question is, How can I stay apprised of and provide input?

[Olivia Tucker] 14:11:56

On new Pnps to ensure our organizations, remain in compliance, to stay up to date.

[Olivia Tucker] 14:12:03

You can first reference the Dxf website for the final and draft Pnps, the frequently asked questions and other information on the Dxf.

[Olivia Tucker] 14:12:14

Secondly, you can join Cdi eyes mailing list by emailing Cdi at ch.

[Olivia Tucker] 14:12:19

Hs. Ca, third, you can join upcoming information is power webinars, and fourth, you can participate in upcoming lac or Ds a Pnp subcommittee meetings. And now I'll turn it over to rim to continue with some more frequently asked questions that we receive

[Rim Cothren, CDII CalHHS] 14:12:40

Thank you, Olivia. You can move on to the next slide, please.

[Rim Cothren, CDII CalHHS] 14:12:45

One of the questions we get asked. A lot are about how the Dsa.

[Rim Cothren, CDII CalHHS] 14:12:53

And its policies, procedures relate to what organizations may currently be required to exchange by Federal or State law, regulation, and just to be clear about that participants must follow all applicable State and Federal law when sharing health insurance, services information and that includes if they're

[Rim Cothren, CDII CalHHS] 14:13:14

Sharing it through the Dsa. For example, if health, insurance services, information is subject to health insurance, portability and Accountability Act or hipaa, or the Lanterman, Petrus Short Act, or Lps, etc.

[Rim Cothren, CDII CalHHS] 14:13:31

You still need to follow those laws in sharing information. The Dsa.

[Rim Cothren, CDII CalHHS] 14:13:35

Does not change that requirement for more information on how to share some types of help in this information. In California.

[Rim Cothren, CDII CalHHS] 14:13:46

I really recommend that people take a look at Cdis.

[Rim Cothren, CDII CalHHS] 14:13:51

State health, information, guidance or shig document which is available on the Cdi website as it provides some specific information on how a sensitive information can be shared with others.

[Rim Cothren, CDII CalHHS] 14:14:04

Next slide, please.

[Rim Cothren, CDII CalHHS] 14:14:09

There are often questions about how to get more information on what the Dsa.

[Rim Cothren, CDII CalHHS] 14:14:15

And the policies and procedures mean for my own organization.

[Rim Cothren, CDII CalHHS] 14:14:18

Your first line of contact. Starting this month should be the educational entities.

[Rim Cothren, CDII CalHHS] 14:14:26

Excuse me. The educational initiative grantee organizations.

[Rim Cothren, CDII CalHHS] 14:14:30

They provide specific organizations for groups of stakeholders you can continue to submit other questions that fall outside of their areas of expertise to the Cdi email address that's listed on the screen here.

[Rim Cothren, CDII CalHHS] 14:14:45

But in all cases a bear in mind that Cdi cannot provide legal advice to your organizations, and so you should continue to check with your own legal counsel for specific questions on how the Dsa.

[Rim Cothren, CDII CalHHS] 14:15:00

Or the policies and procedures may specifically apply to you.

[Rim Cothren, CDII CalHHS] 14:15:04

We can go on to the next slide quickly. I did not read off the organizations were on that last grantee list, but there is a complex set of stakeholders that they will be serving, and we'll just pause here for a moment, so that you may be able to find your type of organization

[Rim Cothren, CDII CalHHS] 14:15:22

On this list and jot down of the organizations the grantee awardees that may be able to assist you in the coming weeks.

[Rim Cothren, CDII CalHHS] 14:15:32

You should be able to find contact information for all of these organizations on the Cdi website

[Rim Cothren, CDII CalHHS] 14:15:46

And these slides will be available on our website. So if you didn't locate your organization here, you can check there.

[Rim Cothren, CDII CalHHS] 14:15:54

Let's go on to the next slide. Please

[Rim Cothren, CDII CalHHS] 14:15:58

The final set of questions that we want to talk about prior to the Q. A.

[Rim Cothren, CDII CalHHS] 14:16:03

Session on the Dsa. Or how are signatories?

[Rim Cothren, CDII CalHHS] 14:16:07

The day, sharing agreements supposed to share data, the data exchange framework allows participants to provide access to or exchange information through any health information network, any health information exchange, any health information organization or any technology that adheres to the dsa provisions and the policies and

[Rim Cothren, CDII CalHHS] 14:16:33

Procedures found on our website. It is a set of rules for the road and not a a specific technology program.

[Rim Cothren, CDII CalHHS] 14:16:43

It is not intended to be an information technology system or a single repository for data, either it is a collection of organizations that are required to share health and social services, information using national standards and a common set of policies and procedures that are identified in the ps and who

[Rim Cothren, CDII CalHHS] 14:17:04

Are signatories to the data sharing agreement required to share data with data.

[Rim Cothren, CDII CalHHS] 14:17:10

Exchange framework requires that every participant provide access to your exchange, health and social services, information with every other participant consistent with the permitted, required and prohibited policy purposes, policies and procedures so that is a good policy and procedure for you to review for specifics

[Rim Cothren, CDII CalHHS] 14:17:30

On what the requirements are are. Note the participation. Excuse me that participants are required to share health and social services.

[Rim Cothren, CDII CalHHS] 14:17:40

Information. Excuse me, are not required to share health and social services.

[Rim Cothren, CDII CalHHS] 14:17:46

Information, if it would violate Federal or State law. Again, the Dsa.

[Rim Cothren, CDII CalHHS] 14:17:52

And the policies and procedures do not override Federal or State law.

[Rim Cothren, CDII CalHHS] 14:17:56

And again organizations may take a look at the FAQ.

[Rim Cothren, CDII CalHHS] 14:18:02

On the Cdi website for more information about required participants on the exchange.

[Rim Cothren, CDII CalHHS] 14:18:09

Next slide, please, and with that, if you have additional call questions, please put them in the Q. A. And I will turn things over to Bob

[Robert Jordan] 14:18:23

Thank you. Rim next slide, please. We're going to look at the portal.

[Robert Jordan] 14:18:29

Live here in a few minutes. But I'd like to begin by setting the table.

[Robert Jordan] 14:18:34

This is what the the portal will look like when you get to the landing page, and you can see a u URL at the bottom.

[Robert Jordan] 14:18:41

Interesting to have. But I will show you that the best way to go is through the Cdi website, the Dxf website and click on the big button there to take you to the portal next slide. Please

[Robert Jordan] 14:18:56

Before you go into sign. It's very important to gather some information.

[Robert Jordan] 14:19:02

First and foremost, the the initial signatories appreciated some time to look at the Dsa.

[Robert Jordan] 14:19:09

And the policies and procedures round through their legal organizations.

[Robert Jordan] 14:19:13

So they were comfortable, with exactly what they were signing.



[Robert Jordan] 14:19:17

Some have gone through their it organization and ask the question, What will this mean when it's time to exchange data?

[Robert Jordan] 14:19:26

So some prep work is definitely an order. Then decide who's going to sign the Dsa.

[Robert Jordan] 14:19:33

For your organization and what are they going to sign for? One of the key principles here is that a single signatory may sign if they're authorized on behalf of all of their subordinate entities?

[Robert Jordan] 14:19:45

Or the appropriate subordinate identities, and we'll talk a little bit about what that subordinate identity might look like.

[Robert Jordan] 14:19:53

And you might want to collect some information on. Have it on hand.

[Robert Jordan] 14:19:58

It's fairly straightforward and simple contact information. And then to identify the different support identities.

[Robert Jordan] 14:20:06

Not, or even yourself, if you're signing as a single entity, is the state license number.

[Robert Jordan] 14:20:12

Or the employer id number the tax id number for a physician organizations and medical groups.

[Robert Jordan] 14:20:19

So having that work done is really helpful. By the time you get to the the portal itself.

[Robert Jordan] 14:20:28

Yeah, if you'll switch over and allow me to share at this point

[Robert Jordan] 14:20:35

I will take us to the

[Robert Jordan] 14:20:42

Data exchange framework website this, you're no doubt familiar with Cdi data exchange framework.

[Robert Jordan] 14:20:51

And if you scroll down here there's a big register here, Block, and this is the simplest the most straightforward way to get to the Dsa.

[Robert Jordan] 14:21:02

Signing portal, and this is where you'll land.

[Robert Jordan] 14:21:05

You would register to start

[Robert Jordan] 14:21:10

If you don't have an account you can sign up now.

[Robert Jordan] 14:21:15

It's a very simple, straightforward sign up method, your email address.

[Robert Jordan] 14:21:19

You'll get sent a verification code standard email verification.

[Robert Jordan] 14:21:25

Then password name. The most important part is right here.

[Robert Jordan] 14:21:30

The legal name, legal business name of the organization that you're going to enter.

[Robert Jordan] 14:21:35

Otherwise, this is contact information for the person that's setting up the account that does not have to be the person that's going to sign

[Robert Jordan] 14:21:46

And if we're not creating an account, but we're simply going to sign in, as I will do right now.

[Robert Jordan] 14:22:02

When you sign in up in the upper right-hand corner you'll see the name that you entered as the contact person.

[Robert Jordan] 14:22:09

And you'll be able to click here on my organizations.

[Robert Jordan] 14:22:15

And go directly to the legal business name of the entity that you entered when you signed in.

[Robert Jordan] 14:22:21

This has already been populated, but we'll walk around through this for just a minute.

[Robert Jordan] 14:22:26

Up here at the top of the page, you'll see a help tab underneath.

[Robert Jordan] 14:22:31

Help. There's a complete set of user instructions, so you can't get lost.

[Robert Jordan] 14:22:35

And when it comes time to select your type there's a map in there that will help you find the type and subtype quick.

[Robert Jordan] 14:22:44

In this case I hear from this primary page. You can see that I've got subordinate organizations, and I've got my primary organization.

[Robert Jordan] 14:22:53

There's not an account type. I left the account type blank, because as this overall organization, I have a number of different subordinate types.

[Robert Jordan] 14:23:04

Number of other entities, and they're all different. So again, the concept to keep in mind is one Dsa can cover multiple entities.

[Robert Jordan] 14:23:14

But we do need to keep track of the types because these are types that are required to sign.

[Robert Jordan] 14:23:21

If you click on your account name, you can see the type of information that's required.

[Robert Jordan] 14:23:27

There's a primary question. Do you have some more than organization?

[Robert Jordan] 14:23:31

Yes or no, and that will determine what you fill in. Notice.

[Robert Jordan] 14:23:35

My account type is blank and I don't have to put in my ein or license number at this state, so then, my mailing address, either I can sign as myself or in a large organization.

[Robert Jordan] 14:23:51

I can have other side in this case. The CEO of the organization is going to sign the Dsa.

[Robert Jordan] 14:23:59

And I can always go back to my organizations, and from there you can add your subordinate organizations.

[Robert Jordan] 14:24:10

When I get to support that organizations. You see, it's pretty simple.

[Robert Jordan] 14:24:14

Just the name, the type, and then that will determine what other data and the address, since we have some of these already populated, let's do a look.

[Robert Jordan] 14:24:28

My primary within this. This organization is the medical Center itself, and well, just delete that for the moment, and go look for it.

[Robert Jordan] 14:24:38

This half to be an acute care, setting, so I'll select that.

[Robert Jordan] 14:24:45

And now it's going to ask me for a subtype.

[Robert Jordan] 14:24:48

I'd already put in cute care hospital, but whoops!

[Robert Jordan] 14:24:56

Let me see cute care settings select on the subtype

[Robert Jordan] 14:25:01

I'm a I'm a cute care hospital, but you can see I can also be other acute or setting, or a psychiatric hospital

[Robert Jordan] 14:25:10

Now I'm populated. Notice the star it what's my license?

[Robert Jordan] 14:25:16

Number. This is the license number assigned by the State to the hospital, and that's what I'm going to put in. The ein is not required in this case.

[Robert Jordan] 14:25:28

So it's that simple to populate. And then my favorite button, save and close, and that takes you right back to the organizations again.

[Robert Jordan] 14:25:40

So very straightforward to add, in this case, as a hospital, I have my own lab.

[Robert Jordan] 14:25:47

It happens to be in the same building as my primary hospital.

[Robert Jordan] 14:25:55

I select my type and I select my subtype. So here's the type is

[Robert Jordan] 14:26:03

Here.

[Robert Jordan] 14:26:06

And the subtype Clinical laboratory, which I can also search for.

[Robert Jordan] 14:26:10

Here. I could also have an imaging set, and others, and then again it wants my license number.

[Robert Jordan] 14:26:20

This would not be my clea number. The Federal clear number.

[Robert Jordan] 14:26:24

This would be my California Cdph. Assigned laboratory number, and then again save and close.

[Robert Jordan] 14:26:33

Very soon, very straightforward, to navigate very little information required other than legal business name.

[Robert Jordan] 14:26:42

My business, names, of my subordinates, their account type, and the license data.

[Robert Jordan] 14:26:48

Now we keep referring to the Eim in my Regional Medical Center.

[Robert Jordan] 14:26:54

I do have a medical group of ambulatory providers.

[Robert Jordan] 14:26:58

So again, I will want to go in and select that ambulatory care settings

[Robert Jordan] 14:27:05

And it brought up the subtype. But typically I would have to go see for that

[Robert Jordan] 14:27:13

And here we are, medical group and since it's a medical group now, at once the employer identification number, because there's no corresponding regulatory authority that gives licenses, this is not an individual provider's license. Number.

[Robert Jordan] 14:27:32

This would be the tax id number for the medical group itself.

[Robert Jordan] 14:27:38

And then again simply save and close

[Robert Jordan] 14:27:43

Now when I'm all done, I've got everything entered in I've got my primary organization, my subordinate organizations.

[Robert Jordan] 14:27:52

I know who is going to sign that's already entered in here, so I can send the Dsa.

[Robert Jordan] 14:27:59

Document for signature. You'll notice this says Resend, because I've already sent it once, and in fact, my signatory Ellen Hospital received one of those Dsas earlier today saying signatures requested, this is done through adobe sign she signed.

[Robert Jordan] 14:28:19

It and gets another message that says, Thank you. You're all done.

[Robert Jordan] 14:28:24

She can look right here and see exactly what she signed.

[Robert Jordan] 14:28:29

And let's look at that for just a moment. This is the data sharing agreement itself, and we'll scroll down here to the bottom



[Robert Jordan] 14:28:42

Where we've got a signature page. So now we can see the person who signed the organization name title, phone number, email address.

[Robert Jordan] 14:28:55

And down here we've got the subordinate identities for which Ellen signed

[Robert Jordan] 14:29:04

So she has a copy, and back here in the primary organization information, you'll see that we've got a copy of the same document right here.

[Robert Jordan] 14:29:16

The one that was signed today. Notice that she signed an earlier one that suggests that she made a change on from her earlier data, perhaps, added the laboratory, and when it shows up here you'll see that there's a different date time group for it so you've got a build in audit trail.

[Robert Jordan] 14:29:36

Of everything that you've done, and it's chronological.

[Robert Jordan] 14:29:40

It never goes away. So it's straightforward, and you can make changes and resend at any time.

[Robert Jordan] 14:29:48

So that's the that's the portal.

[Robert Jordan] 14:29:51

Would you take me back to the Slides? Place

[Robert Jordan] 14:30:01

Now let's go through some of the frequently asked questions.

[Robert Jordan] 14:30:04

This looks easy, Bob, but how can it be next one? Please

[Robert Jordan] 14:30:11

The most common question is, What are these license numbers that I've got to collect?

[Robert Jordan] 14:30:16

And the answer is, Look to your regulators. How are you regulated?

[Robert Jordan] 14:30:21

How are you licensed if you're a hospital, you've got a license number from Cdph.

[Robert Jordan] 14:30:27

If you're a health care, plan a little more complicated department of managed health Care Department of Insurance, a risk bearing organization number, or perhaps a contract number under Dhcs.

[Robert Jordan] 14:30:41

It's simply finding that right license number and plugging it in, clinical laboratories.

[Robert Jordan] 14:30:47

I mentioned? Is not the Federal clea number, but the California Department of Public Health License Number.

[Robert Jordan] 14:30:54

So always go back to who is my regulator, and therefore what license number should I put in this, by the way, is really critical for determining, if you were a mandatory signer?

[Robert Jordan] 14:31:07

Did you actually sign up next question? Please just give me next portal next question next page.

[Robert Jordan] 14:31:15

Do I have subordinate organizations, and what do I do if they're part of the same facility?

[Robert Jordan] 14:31:20

This goes back to the fundamental concepts again. Number one, a single individual can sign a single Dsa for multiple entities that are all related.

[Robert Jordan] 14:31:31

And that's what subordinate organizations are about.

[Robert Jordan] 14:31:34

It can be done by a health plan, for example, with their subordinate plans, some of whom are regulated by the department of managed care, commercial plans by department of insurance, but a single individual can be authorized to sign for both of those similarly as you just saw in the example.

[Robert Jordan] 14:31:54

Of my Medical center, a license clinical lab exists within the Acute Care Hospital, and so I list them both as subordinate organizations.

[Robert Jordan] 14:32:06

This lets me list them with their license numbers and their legal business names, so they can be counted correctly against the list of all those that are mandatory.

[Robert Jordan] 14:32:16

Signatories next slide. Please.

[Robert Jordan] 14:32:24

Now, what happens if I acquire a subordinate identity not uncommon, and in the case of my Hospital Medical Center that I showed earlier, obviously, they added a new entity to today, and you saw the Resend Dsa.

[Robert Jordan] 14:32:41

Button. All you have to do is go in and add a new organization.

[Robert Jordan] 14:32:45

New subordinate organization, and resend the Dsa.

[Robert Jordan] 14:32:50

The new Dsa. Will include everything you had before, as well as what's new.

[Robert Jordan] 14:32:57

And as you saw, there's a new date stamp on it, date and time, so you can keep track of what you signed for when and the next slide, please

[Robert Jordan] 14:33:10

And of course there's the corollary to this.

[Robert Jordan] 14:33:13

How do I divest something? How do I take it off of my Dsa.

[Robert Jordan] 14:33:17

If I sell an organization, or if I close a facility and I open a new one, how do I get it off of there?

[Robert Jordan] 14:33:25

You can't you do petition the Cdi with a written request, and you state the information listed here, and you'll find that in Section 15 of the Dsa.

[Robert Jordan] 14:33:39

You'll find a methodology for removing things where you've previously signed for the so it's possible to take off.

[Robert Jordan] 14:33:48

But we did not allow the portal to eliminate anything just without an approval process that also raises the question that was asked.

[Robert Jordan] 14:34:00

In Q. A. Well, this portal remain open after January the 30.

[Robert Jordan] 14:34:06

First let me answer is yes, because we understand that there will be the need over the coming year to add and subtract different organizations with time.

[Robert Jordan] 14:34:19

So the portal remains open, and with the the tracking mechanism we'll be able to see from time to time, or you'll be able to keep track of in your dsas.

[Robert Jordan] 14:34:31

Exactly what you had when next slide. Please

[Robert Jordan] 14:34:37

So, all well and good. But what if I forget this information?

[Robert Jordan] 14:34:41

Well, the Dsa. And the Pmps are all available on the Dxf website always available to you for review, the signing portal, as you saw conspicuous on that website, so you can always click to get to it or get back to it there's also a section on the the Dsa and

[Robert Jordan] 14:35:01

Sanigning portal. Faqs. The Faqs are kept up, the date with everything that we receive, and they are excellent, and of course, as the Pmps, as you saw earlier, there are several still in development.

[Robert Jordan] 14:35:16

Be on the lookout for the opportunities for public comment, and to see which of those finish the process.

[Robert Jordan] 14:35:25

And as you have questions along the way, Elaine gave you earlier the the email address of Cdii at C Hsca.

[Robert Jordan] 14:35:37

Dot gov, that's where a number of the Faqs have originated.

[Robert Jordan] 14:35:43

And with that I will pass the baton back

[Elaine Scordakis] 14:35:50

Thanks, Bob. Can you have the next slide

[Elaine Scordakis] 14:35:54

So now. Q. A. Time we're we're monitoring. We've been monitoring the Q.

[Elaine Scordakis] 14:35:59

And a while Bob and Olivia and Rim have been giving their presentations, and if we go to the next slide, please, great!

[Elaine Scordakis] 14:36:10

I will start with Olivia. Olivia, when you're monitoring the questions.

[Elaine Scordakis] 14:36:14

Are there any legal questions that popped out to you that maybe you could address today?

[Olivia Tucker] 14:36:19

Yeah, we've gotten a few that ask what the consequences of a mandatory signatory, not signing the Dsa.

[Olivia Tucker] 14:36:27

Are, or if they're signing late, A B 1 33 requires all health or health care organizations to execute the Dxf, and it's data sharing our agreement. By January the 30 first 2,023 we would encourage all entities, including health

[Olivia Tucker] 14:36:43

plans who may not be able to make this legal deadline to let Cdi know as soon as possible along with the reason for the delay and the expected signature date.

[Olivia Tucker] 14:36:54

We would love to help you come into conference and get it signed by the deadline.

[Olivia Tucker] 14:37:00

But if for some reason that that isn't feasible, please reach out to us, sooner is better, and we can work with you to get you up to speed.

[Olivia Tucker] 14:37:10

We also received a question about whether the January thirty-first deadline would be extended.

[Olivia Tucker] 14:37:16

The answer, there is likely not. The date is given to us by A. B 133, so we don't exactly have power to push that date

[Olivia Tucker] 14:37:27

I think the other ones may be more in Rems Wheelhouse, so I will pass it to rem at this time

[Rim Cothren, CDII CalHHS] 14:37:40

Great thanks. Thanks, Olivia, and I would just also refer people.

[Rim Cothren, CDII CalHHS] 14:37:47

Some questions have been answered in writing, and you can see the the answered questions there, for example, we received a number of questions about.

[Rim Cothren, CDII CalHHS] 14:37:57

Is my organization required to sign, I answered one of those questions.

[Rim Cothren, CDII CalHHS] 14:38:02

We would refer people to the language, and Ab. 1, 33 and the FAQ.

[Rim Cothren, CDII CalHHS] 14:38:10

On for help, on what organizations are required to sign the Dsa. Again.

[Rim Cothren, CDII CalHHS] 14:38:15

We can't provide legal advice, so we would encourage people to look to their legal counsel to help them determine whether they're organization meets the requirements of maybe 1 33

[Rim Cothren, CDII CalHHS] 14:38:29

There was a question about an organization that might use another entity system to share information such as another entities, ie. Hr.

[Rim Cothren, CDII CalHHS] 14:38:43

And whether that organization is still required to sign the Dsa.

[Rim Cothren, CDII CalHHS] 14:38:46

Answer to that is, Yes, the Dsa binds you to certain procedural and functional requirements, and so those organizations are still required to sign, even if they are going to be using the it.

[Rim Cothren, CDII CalHHS] 14:39:01

Infrastructure of some other organization. The data exchange framework allows organizations to meet their data, sharing obligations, using many different options of platforms and technologies.

[Rim Cothren, CDII CalHHS] 14:39:17



A similar question is, will the Dsa consider exchange leveraging existing frameworks and technologies?

[Rim Cothren, CDII CalHHS] 14:39:24

And, as we said before, the Txf. Is intended to be a set of rules of the road a.

[Rim Cothren, CDII CalHHS] 14:39:29

B, 133 identifies that organizations may be allowed to use various health information exchanges, health information networks and technology platforms.

[Rim Cothren, CDII CalHHS] 14:39:39

So the answer is, yes, that there are many ways to meet the obligations and it's just necessary to ensure that whatever method you're using meets the requirements of the Dsa.

[Rim Cothren, CDII CalHHS] 14:39:50

And the policies and procedures. There was one question on how and where do we access?

[Rim Cothren, CDII CalHHS] 14:40:00

A list for seeing who assigned the Dsa.

[Rim Cothren, CDII CalHHS] 14:40:03

That's an excellent question. We will be posting a list on the Cdi website so that organizations can see who assigned that list is not yet available.

[Rim Cothren, CDII CalHHS] 14:40:12

But we'll be getting that up as soon as we can.

[Rim Cothren, CDII CalHHS] 14:40:15

I think that was the majority of questions on the Dsa.

[Rim Cothren, CDII CalHHS] 14:40:19

And pnps, I will turn myself back to the Q. A.

[Rim Cothren, CDII CalHHS] 14:40:23

To see if there are any new ones, and pass things to Bob about signing portal questions

[Robert Jordan] 14:40:31

Thank you. Rim. A couple of questions that I saw along the way.

[Robert Jordan] 14:40:37

Will we be able to Public Health Agency, be able to sign up our accounting to sign up at multiple times.

[Robert Jordan] 14:40:45

First one agency, later another. Yes, the portal will be open all year, and the voluntary agencies can sign at any time.

[Robert Jordan] 14:40:52

It's only those that by law are required assigned by January thirty-first, that need to meet that January thirty-first deadline.

[Robert Jordan] 14:41:04

There was also a question regarding entities that share a common ein.

[Robert Jordan] 14:41:10

Do they have to sign up individually? And the answer there would be depending on their licenses.

[Robert Jordan] 14:41:18

If, if there's a common license common.

[Robert Jordan] 14:41:21

Ein then that's one situation. If they're different licenses for those entities, then yes, they'd have to be done individually.

[Robert Jordan] 14:41:31

Again, the concept is we wanna be able to count all those organizations that are individually licensed and on the mandatory type.

[Robert Jordan] 14:41:42

To make sure that they actually got in. Let's see other questions. I'm just scanning the Q.

[Robert Jordan] 14:41:53

And a real quick. Oh, there was, do recipients receive assigned copy of their Dsa.

[Robert Jordan] 14:42:00

Yes, when they signed it, and also, as you saw, it, resides within the portal itself.

[Robert Jordan] 14:42:05

So it can always be accessed through there. I'm my mom.

[Robert Jordan] 14:42:13

To ambulatory, based provider organizations signed separate from health systems. Probably.

[Robert Jordan] 14:42:21

So again. It's a matter of the health system would be the primary and below the health system.

[Robert Jordan] 14:42:27

There could be provider organizations as well as other entities.

[Robert Jordan] 14:42:33

Sometimes a hospital, sometimes laboratories. So it all depends on the the way the organization itself is structured.

[Robert Jordan] 14:42:44

I think that's I think that's it that I miss anything.

[Robert Jordan] 14:42:48

Rim.

[Rim Cothren, CDII CalHHS] 14:42:52

Out that I noted

[Robert Jordan] 14:42:53

Okay.

[Elaine Scordakis] 14:42:56

Great, well, good questions. Thank you so much, and thank you to all of you for sending us those questions.

[Elaine Scordakis] 14:43:03

Can we go to the next slide, please? In the next one so just as wrap up again, we want to thank you for being with us today.

[Elaine Scordakis] 14:43:12

We, we, we know we encourage you to please continue to stay involved in all this work.

[Elaine Scordakis] 14:43:17

Some of the things, some opportunities for you to be.

[Elaine Scordakis] 14:43:21

Say engaged is, of course, we have our implementation advisory committee meetings coming up on January tenth.

[Elaine Scordakis] 14:43:28

We have our next webinar on January nineteenth, that's at 9 Am.

[Elaine Scordakis] 14:43:33

We have a data sharing agreement policy and procedure subcommittee meeting on the 26.

[Elaine Scordakis] 14:43:39

So plenty of options to participate and provide feedback, and then of course, don't forget if you want to, you know, hear more from us.

[Elaine Scordakis] 14:43:48

You can be asked asked to be added to our community lister by sending us an email@[cvi.see?](mailto:cvi.see?)

[Elaine Scordakis] 14:43:54

At.com next slide. Please

[Elaine Scordakis] 14:44:03

So finally, as always, we encourage you to check out our website.

[Elaine Scordakis] 14:44:07

That's been referenced quite a bit today you can see that URL right there on the screen.

[Elaine Scordakis] 14:44:13

It has everything you need to know a lot of past webinars.

[Elaine Scordakis] 14:44:17

Faqs, all of an abundance of information is available on that website.

[Elaine Scordakis] 14:44:22

So again. Thank you so much for joining us today, and we hope you have a good afternoon