Q&A Procedure

- Today's session will be recorded.

- Throughout the session, participants may:
  - Submit questions through the Zoom Q&A function.
  - Follow the instructions on this slide to ask a spoken question.

- Presenters will address questions verbally and in the Q&A – volume and time permitting.

- If your question was not answered during the session and you would like to follow up with CDII, please submit it to cdii@chhs.ca.gov.

For Spoken Questions	
Logged into Zoom	**Phone Only**
If you logged on via Zoom interface	If you logged on via phone-only
Press "Raise Hand" in the "Reactions" button on the screen	Press "*9" on your phone to "raise your hand"
If selected to ask your question, you will receive a request to "unmute;" please ensure you accept before speaking	Listen for your phone number to be called by moderator
	If selected to ask your question, please ensure you are "unmuted' on your phone by pressing "*6"

- Participants should keep their questions brief.
- Participants who have a follow-up question should raise their hand to get back in line.

DATA EXCHANGE FRAMEWORK

2

Additional Opportunities to Ask Questions

Attendees have additional opportunities to ask questions related to the DxF Grant Program through various channels, including:

- Reach out to one of the <u>DxF Educational Initiative Grantees</u>.

- Submit your question(s) to the CDII Inbox: <u>cdii@chhs.ca.gov</u>.

- See upcoming slides about contact information for other DxF Grants Program Partners of CDII

CDII also will provide updated information about the DxF Grant Program on its <u>website.</u>

DATA EXCHANGE FRAMEWORK

Speaker Introductions

DeeAnne McCallin

Deputy Director

CDII

Juliette Mullin

Senior Manager

Manatt Health Strategies

Mark Noyes

Grant Lead

Public Consulting Group

Jessica Decker

Consultant

Public Consulting Group

Bob Jordan

Consultant

California Association of Health Information Exchanges

◆✕ DATA EXCHANGE
FRAMEWORK

Today's Town Hall

Today's *Information Is Power* Webinar is structured as a two-hour Town Hall focused on **DSA Signatory Grants.**

- Vision for Data Exchange in California
- DxF Program Updates
- DSA Signatory Grants Town Hall
  - *Outlining Grant Opportunities*
  - *Explaining How to Apply*
  - *Demonstrating the Grant Portal*
  - *Answering Your Questions*

DATA EXCHANGE FRAMEWORK

Vision for Data Exchange in California
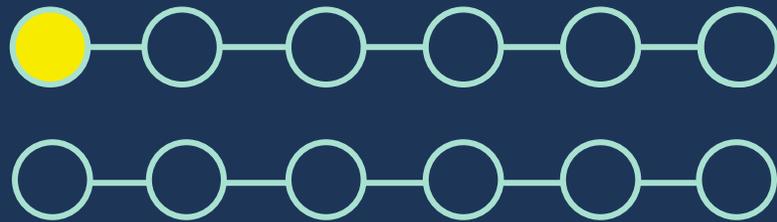
The Vision for Data Exchange in California

Once implemented across California, the Data Exchange Framework (DxF) will create new connections and efficiencies between health and social services providers, improving whole-person care.

The DxF is California's first-ever statewide Data Sharing Agreement (DSA) that requires the secure and appropriate exchange of health and human services information to enable providers to work together and improve an individual's health and wellbeing.

DATA EXCHANGE FRAMEWORK

DxF Program Updates
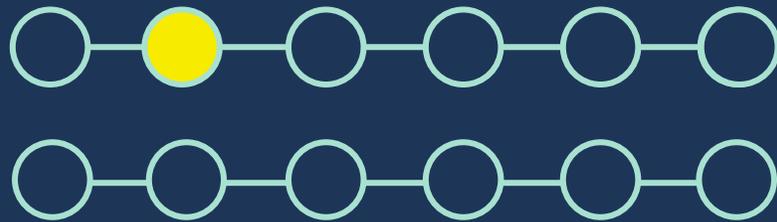
DxF this Month

Since our last *Information is Power* webinar on April 18, 2023, CDII and stakeholders have continued to advance DxF implementation across several domains.

Governance
- CDII facilitated a joint IAC & DSA P&P Subcommittee meeting on April 24, 2023 reviewing adjustments to draft P&Ps and updates to the QHIO Program and DSA Signatory grants.
- CDII will facilitate the next joint IAC & DSA P&P Subcommittee meeting on **June 5, 2023**.

DSA P&P Development
- CDII reviewed status of several draft/amended P&Ps at the joint IAC & DSA P&P SC meeting on April 24, 2023.
- CDII will continue to advance draft P&Ps and release additional P&Ps for public comment in the coming weeks.

DxF Grants
- CDII released a comprehensive DSA Signatory Grant Program guidance document.
- **CDII expects to open the DxF Grant Portal for Applications this week.**

QHIO
- QHIO Program documents recently closed to public comment.
- CDII will review and incorporate stakeholder feedback received on the QHIO draft application and the draft QHIO Program Policy & Procedure.

DATA EXCHANGE FRAMEWORK
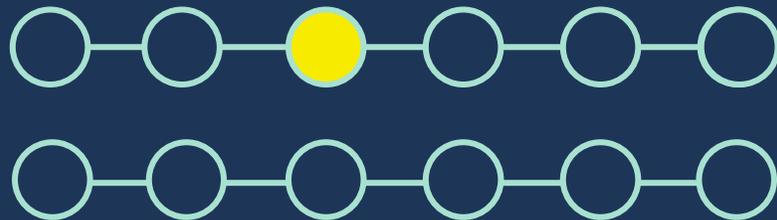
How familiar are you with the DSA Signatory Grants?

Vote in the Zoom poll.

1 — **Not Familiar**

This is my first time hearing about it.

2 — **Slightly Familiar**

I've heard about it in other forums or webinars, but am not familiar with any details.

3 — **Familiar**

I know the basics, but don't think I have a clear understanding of it and could use another overview.

4 — **Very Familiar**

I've been to all the webinars and read the guidance document... but I have some questions.

5 — I'm **ready to apply** – just show me how!

DATA EXCHANGE FRAMEWORK

Introducing PCG, the DSA Signatory Grants TPA

CDII has contracted with **Public Consulting Group (PCG)** to be the Third-Party Grant Administrator for the DSA Signatory Grants.

Working closely with CDII, PCG will:

- Review applications and recommend applications for approval to CDII
- Serve as the fiscal administrator
- Troubleshoot issues as they arise
- Collect and review progress reports
- Report on best practices and disbursement of funds

DATA EXCHANGE FRAMEWORK

Introducing CAHIE, QHIO Onboarding Grant Support

CDII has contracted with the **California Association of Health Information Exchanges (CAHIE)** to provide application writing support for organizations interested in applying for the QHIO Onboarding Grant.

CAHIE will provide end-to-end Application support and submission for all QHIO Onboarding Grant Applications, including:

- Holding one-on-one enrollment calls with applicants to discuss grant specifics
- Reviewing applicant's grant eligibility & funding qualifications
- Drafting and submitting applications

DATA EXCHANGE FRAMEWORK

Understanding the DSA Signatory Grant Opportunity
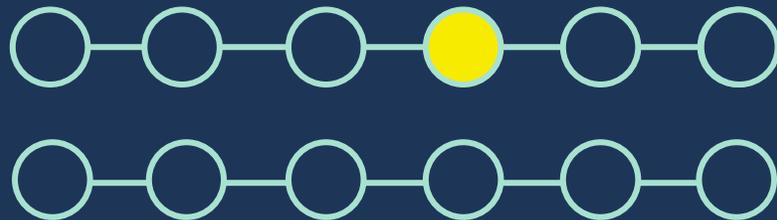
DxF Grant Program

CDII will administer $50 million in funding over two years to support implementation of the DxF.

Key Program Goals

Support DxF implementation among DxF signatories in under-resourced geographies and/or serving historically marginalized populations and underserved communities

Address significant barriers to DxF implementation (operational, technical, or other) for DxF signatories

Align across other grant programs and promote activities ineligible for funding by other grant programs (past or present)

DATA EXCHANGE FRAMEWORK

15

DxF Grant Types

Educational and Outreach Activities *($3 Million)*

DxF Educational Initiative Grants

Educational Initiative Grants **provided funding to eight associations and their partners** for educational initiatives designed to provide information about the Data Exchange Framework and the Data Sharing Agreement to signatories.

Supporting DSA Signatories *(Up to $47 Million)*

DSA Signatory Grants *(Forthcoming)*

The DSA Signatory Grants are **designed to provide direct support to Signatories** to subsidize their implementation efforts. This grant will fund activities for Signatories to meet their DSA requirements

DATA EXCHANGE FRAMEWORK

DSA Signatory Grants: Applicant Guidance Document

The **Guidance Document** provides additional information on the DSA Signatory Grant Program, including details specific to each of the grant domains.

https://www.cdii.ca.gov/wp-content/uploads/2023/05/DSA-Signatory-Grants-Applicant-Guidance-Document-Final-05.01.23.pdf

DATA EXCHANGE FRAMEWORK

When will applications be accepted?

Up to $47 million in funding will be allocated to applicants across **at least three rounds of funding**.

CDII is holding multiple rounds to balance the 2024 deadline for some organizations to begin exchanging data while ensuring that organizations with limited resources have sufficient time to complete and submit a grant application.

	Estimated Dates of Each Round (May Be Subject to Change)					
	Q2 2023			Q3 2023		
	April	May	June	July	August	September
Short Expedited Rounds Open to Certain Signatories Who May Need to Implement by 2024		Round 1	Round 2			
Full Round(s) Open to Eligible Signatories				Round 3*		

*Additional funding rounds may be held depending on application volumes and scoring in earlier rounds.

DATA EXCHANGE FRAMEWORK

18

Who qualifies for DSA Signatory Grant funding?

The following criteria apply to both the QHIO Onboarding or TA Grants

(1) Must be a DSA Signatory

A **Signatory** is defined as an organization that has signed the Data Sharing Agreement. Organizations may sign the DSA directly, or a "parent organization" may sign the DSA on their behalf as a "subordinate organization."

(2) Must have an HIT Need

Signatory must demonstrate that they require technical support and capabilities to assist in meeting DSA requirements.

For Short Expedited Rounds (1&2), Starting in May 2023

For the first two rounds only: To help meet DxF implementation deadlines, Signatories in Applications for the first two rounds of DSA Signatory Grants are limited to specific organization types, listed below:

- General acute care hospitals;
- Physician organizations and medical groups;
- Skilled nursing facilities;
- Health care services plans and disability insurers;
- Clinical laboratories; and
- Acute psychiatric hospitals.

For Round 3+, Starting in July 2023

Round 3 opens the grant opportunity to most Signatories who demonstrate an HIT need, including voluntary signatories of the DSA.

DATA EXCHANGE FRAMEWORK

19

Who qualifies for DSA Signatory Grant funding?
How to Sign the Data Sharing Agreement

Many have already signed or are included in a signed DSA as a subordinate organization

To be eligible to apply for a DSA Signatory Grant, you must have signed the DSA.

If your organization has not yet done so, here's how to get started:

- [DSA Signing Portal](#)

- Select **Register to Start**
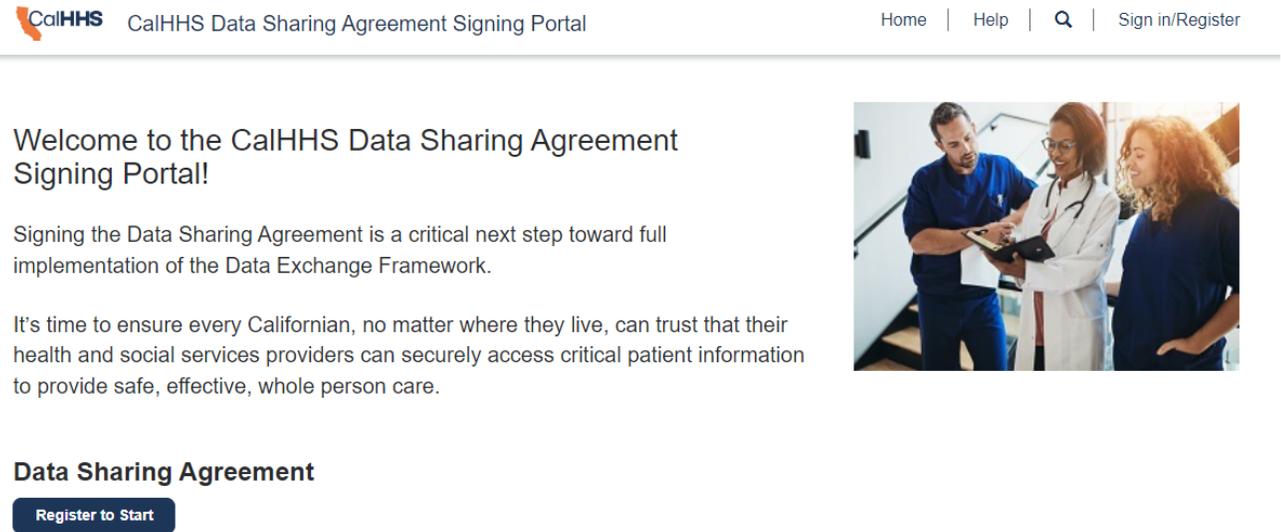
CalHHS | CalHHS Data Sharing Agreement Signing Portal | Home | Help | 🔍 | Sign in/Register

Welcome to the CalHHS Data Sharing Agreement Signing Portal!

Signing the Data Sharing Agreement is a critical next step toward full implementation of the Data Exchange Framework.

It's time to ensure every Californian, no matter where they live, can trust that their health and social services providers can securely access critical patient information to provide safe, effective, whole person care.

Data Sharing Agreement

Register to Start

Not sure if your organization has signed the DSA? Look at the Signatory list [here](#).

DATA EXCHANGE FRAMEWORK

20

Who can submit a grant application?

Eligible Signatories may chose to apply on their own, or as part of an "umbrella" application with other Signatories.

An **Applicant** is the organization that submits the Application for a DSA Signatory Grant. They can be:

- An eligible Signatory applying on its own behalf

OR

- An organization applying on behalf of one or multiple eligible Signatories (referred to as an Umbrella Applicant).

  - Examples include a corporate parent, an Independent Practice Association, or other.
  - All Signatories included in an Application must co-sign the Application.

DATA EXCHANGE FRAMEWORK

What are the two grant options?

Eligible DSA Signatories may apply for _one_ of the following grant opportunities:

	Qualified Health Information Organization (QHIO) Onboarding Grant	**Technical Assistance (TA) Grants**
	The "**assisted**" pathway.	The "**build your own**" pathway.
Required Grant Outcomes	Complete onboarding with a **Qualified Health Information Organization (QHIO)** ➢ A QHIO is a health information organization that has been qualified by CDII based on its ability to meet DxF data exchange requirements.	Achieve at least one of the following **required outcomes**: 1. Identified and contracted with a technology solution 2. Implemented a technology solution capable of supporting real-time data exchange 3. Adjusted, upgraded, or adopted an electronic documentation system 4. Created or provided training for new workflows
Activities	CDII will publish a list of QHIOs, who can help Signatories identify technical or operational solutions to complete onboarding.	Applicants are responsible for identifying technical or operational solutions to achieve DSA requirements.
Application Process	Applications are submitted by CAHIE on the Applicant's behalf.	Applications are submitted by the Applicant.
Grant Management	The Grantee's contracted QHIO receives and manages grant funds.	The Grantee receives and manages the funds directly.

DATA EXCHANGE FRAMEWORK

How can Signatories use funding?

Permissible and impermissible uses vary by grant type.

Qualified Health Information Organization (QHIO) Onboarding Grant	Technical Assistance (TA) Grants
If awarded, QHIO Onboarding Grant Applicants will work with their selected QHIO to determine how funds will be used to complete onboarding.	**TA Grant Applicants must demonstrate how proposed funding will help them meet DSA requirements.**

Qualified Health Information Organization (QHIO) Onboarding Grant

✓ Offset QHIO Onboarding costs
✓ Offset Signatory Onboarding costs

✗ Ongoing HIE costs
✗ Purchasing new EHR technology
✗ Onboarding to a non-qualified HIO
✗ Changing from one QHIO to another

Technical Assistance (TA) Grants

✓ Identifying/contracting with a technology vendor
✓ Onboarding costs to implement a technology solution that establishes real-time data exchange
✓ Adjusting, upgrading, or adopting an EHR
✓ Creating/providing training on workflows/processes

✗ Recurring costs for a HIO, EHR, or other health IT system

DATA EXCHANGE FRAMEWORK

How much funding can Signatories request?

To help Signatories with their applications, CDII has published the process for determining the maximum grant funding that a Signatory can request.

Type of Signatory	Baseline Funding Maximums
▪ General Acute Care Hospitals ▪ Acute Psychiatric Hospitals ▪ Skilled Nursing Facilities	$50,000
Physician Organizations and Medical Groups	$35,000
Health Insurance Plans	$25,000
Clinical Laboratories	$15,000
Other DSA Signatories	$25,000

- Signatories meeting certain criteria may be eligible for more funding, referred to as enhanced funding.

- Regardless of Signatory characteristics, the total potential Application maximum is $500,000.

- For a more detailed slide on funding amounts, see Appendix and the DSA Signatory Grant Guidance Document.

DATA EXCHANGE FRAMEWORK

24

How and when are funds disbursed?

If awarded, a Grantee will receive its award as it achieves two milestones.

	Qualified Health Information Organization (QHIO) Onboarding Grant	Technical Assistance (TA) Grants
	QHIOs submit progress reports attesting to milestone completion.	*Applicants submit progress reports attesting to milestone completion.*
Milestone 1 *Within 12 months of award*	Contract Signed between Signatory & QHIO*	Demonstration that grantee has procured resources that will account for at least 50% of the grant budget
Milestone 2 *Within 24 months of award*	Attestation of Completed QHIO Onboarding	Demonstration that grantee has achieved one of the four required outcomes of a TA Grant

* Grantees can select and contract with a QHIO at any point between January 1, 2023, and one year after their grant award is announced. Organizations that contract with HIOs prior to the announcement of QHIOs understand that they will not be able to use a QHIO Onboarding Grant to onboard to that HIO if it is not qualified by CDII. See page 18 of Guidance document for what options an Applicant will have in the event their HIO of choice does not become a QHIO.

DATA EXCHANGE FRAMEWORK

Questions?

About grant eligibility, the choice of two grant domains, or eligible grant-funded activities

For Written Questions

Logged into Zoom

If you logged on via Zoom interface

Type your question in the Q&A and presenters will address in the Q&A or verbally (time permitting).

If your question was not answered during the session and you would like to follow up with CDII, please submit it to cdii@chhs.ca.gov.

For Spoken Questions

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If selected to ask your question, you will receive a request to "unmute;" please ensure you accept before speaking

Phone Only

If you logged on via phone-only

Press "*9" on your phone to "raise your hand"

Listen for your phone number to be called by moderator

If selected to ask your question, please ensure you are "unmuted' on your phone by pressing "*6"

DATA EXCHANGE FRAMEWORK

How to Apply for a DSA Signatory Grant

What information will I need to provide?

The application will collect the following information. (Applies to both the QHIO Onboarding Grant and the TA Grant.)

Characteristics of all Signatories included in the application, including:

- Signatory type
- Information about signed DSA
- Population Served (% Medi-Cal/duals/uninsured)
- Geographic information (for Healthy Places Index)
- Previous or current health IT funding
- Current EHR (if applicable)
- Current data exchange capacity

Details of grant request:

- Planned use of funding
- Budget request (with detailed line item breakdown for TA grants)
- Description of plans for meeting DSA Requirements
- Description of plans for maintaining DSA Requirements

DATA EXCHANGE FRAMEWORK

28

How do I apply?

Qualified Health Information Organization (QHIO) Onboarding Grant

CAHIE will provide end-to-end application support for **all** QHIO onboarding applicants. Applicants for this grant should **not** begin an application in the DxF Grant Portal (hosted on GrantsConnect).

Interested applicants should contact CAHIE as soon as possible to begin the process by emailing* **grantsupport@cahie.org**

*See Appendix on what to include in your email

CAHIE submits on behalf of Applicant.

Technical Assistance (TA) Grants

Applicants for TA Grants should directly complete and submit their Application on the DxF Grant Portal (hosted on GrantsConnect).

TA Applicants who have questions about their Application and need support can contact PCG at:
- **DSAGrants@pcgus.com**
- 1-866-698-6525

APPLICANT submits directly.

DATA EXCHANGE FRAMEWORK

When can I apply for a DxF Signatory Grant?

- The estimated dates of the funding rounds are:

    ➢ For Mandated Signatories:
    - **Round 1:** May 17 to **June 16, 2023**
    - **Round 2:** June 17 to **July 16, 2023**

    ➢ For Most Signatories (Mandated or Voluntary):
    - **Round 3:** July 1 to **September 30, 2023***
    - Other rounds may be announced later

    * Subject to change

- ***For Round 1 QHIO Onboarding Applicants:*** Although QHIOs will not yet be named as of Round 1, the Guidance Document explains how Applicants can select a QHIO after their grant determination and how Applicants with a planned HIO partner can proceed if that partner is not qualified. See page 18 of the Guidance.

- If Applicants do not receive an award during one application window, the applicant may be deferred to a future round or may be encouraged to apply in a subsequent round.

DATA EXCHANGE FRAMEWORK

What are my steps to apply?

1. Review guidance document, listen to recorded webinars & information sessions, and attend office hours
2. Gather the materials you'll need to support your application

Qualified Health Information Organization (QHIO) Onboarding Grant	Technical Assistance (TA) Grants
3. Email CAHIE **grantsupport@cahie.org**, and include your contact information. 4. Work with CAHIE to complete and submit the application. 5. Review application as "contributor" in the DxF Grant Portal.	3. Log into the DxF Grant Portal and complete your application. 4. Access application support if needed: **DSAGrants@pcgus.com** 5. Submit application.

DATA EXCHANGE FRAMEWORK

DxF Grants Portal: Login or create your account

- If you already have a username and password for **GrantsConnect**, please enter it here.

- If you do not have an account, please select **Sign Up.**

- Follow the [instructions](#) to complete your account setup.

DATA EXCHANGE FRAMEWORK

32

DxF Grants Portal: Account verification

- You will receive a confirmation email from PCG.
  - Check your junk/spam folder if it does not arrive.

The verification email expires after 24 hours.

If needed, select 'Resend Verification Email' under 'Sign-In.'

DxF Grants Portal: Verify your account

- Enter the code sent to you in the verification email.

- You can have your account information stored for 30 days.

DATA EXCHANGE FRAMEWORK

DxF Grants Portal: Contacting the GrantsConnect Support Team

- You can get help logging into GrantsConnect by contacting the GrantsConnect support team.

- The team can be contacted through live chat or by submitting a ticket using the links at the bottom right of the screen.

- Once logged in, use the question mark at the top right of the screen.

DATA EXCHANGE FRAMEWORK

35
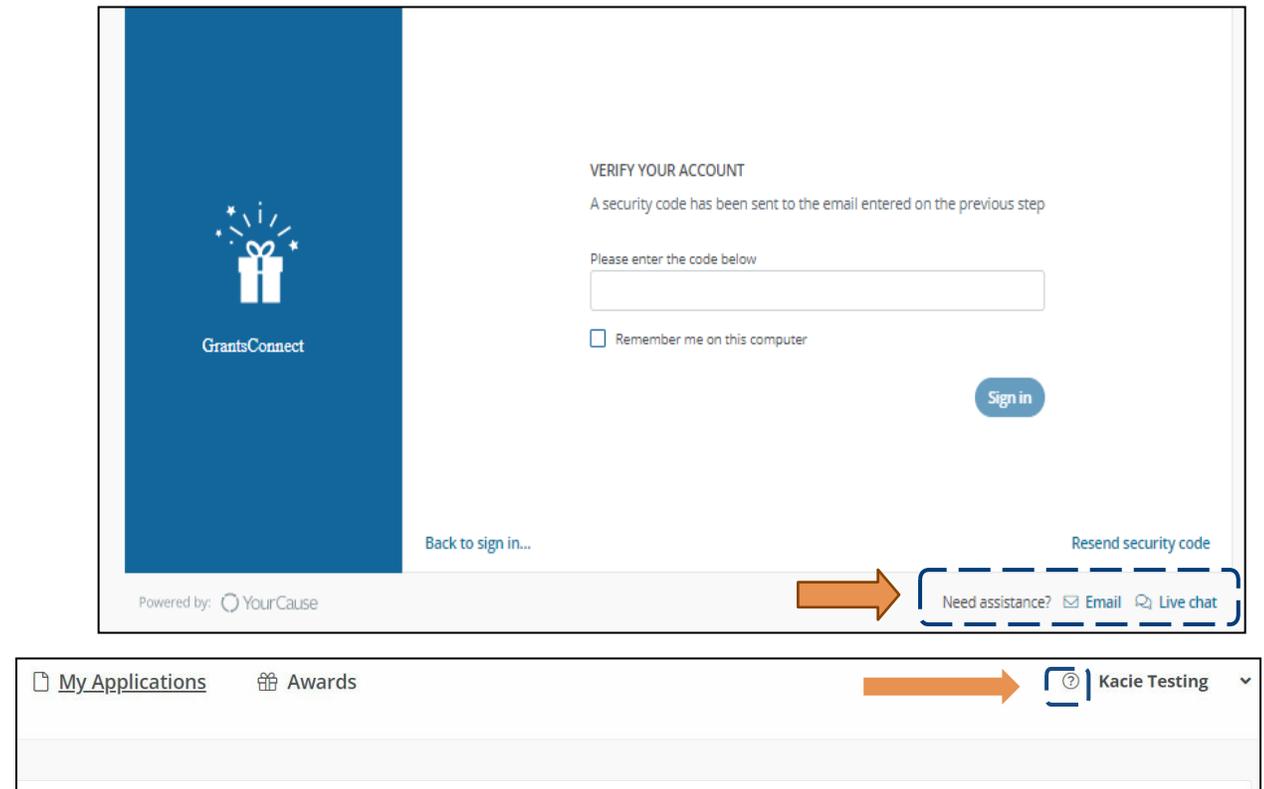
Questions?

About the application and how to get started

For Written Questions

Logged into Zoom

If you logged on via Zoom interface

Type your question in the Q&A and presenters will address in the Q&A or verbally (time permitting).

If your question was not answered during the session and you would like to follow up with CDII, please submit it to cdii@chhs.ca.gov.

For Spoken Questions

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If selected to ask your question, you will receive a request to "unmute;" please ensure you accept before speaking

Phone Only

If you logged on via phone-only

Press "*9" on your phone to "raise your hand"

Listen for your phone number to be called by moderator

If selected to ask your question, please ensure you are "unmuted' on your phone by pressing "*6"

DATA EXCHANGE FRAMEWORK

QHIO Onboarding Application Walkthrough
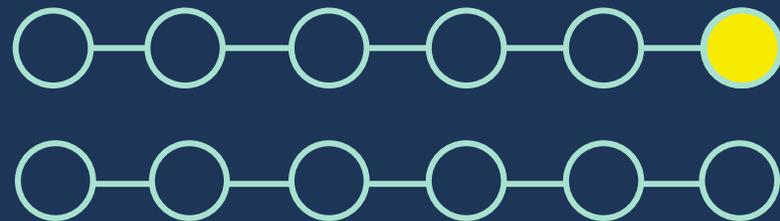
How CAHIE Assists QHIO Onboarding Grant Applicants

CAHIE will provide end-to-end application support for all QHIO Onboarding Grant applicants including:

- ✓ One-on-one enrollment calls with applicants to discuss grant specifics and applicant's current data exchange capabilities, roadblocks, and resources
- ✓ Review of applicant's grant eligibility & funding qualifications
- ✓ Draft grant narratives on behalf of the applicant
- ✓ ***Enter all information, including narratives, into the portal on behalf of the applicant***

Contact CAHIE as early as possible to begin the process by emailing: **grantsupport@cahie.org**.

Applicants will be added as **contributors** to their Application in the DxF Grant Portal so they can review their Application and track it once submitted, but they do not need to create their own Application.

DATA EXCHANGE FRAMEWORK

Public Service Announcement!

The application portal is built for both QHIO Onboarding & TA Grants applications, but the following sections of this session will walk through the process for submitting a **TA Grant Application**.

TA Grants

Applicants applying for a TA Grant will do their own entry and application submission in the DxF Grant Portal.

QHIO Onboarding Grants

Applicants for QHIO Onboarding Grants are required to work with CAHIE to complete and submit their application. **They should not being an application in the DxF Grant Portal**; CAHIE will do that for them.

But there is value in listening to this walkthrough no matter the type of application you may be applying for because it shows the application elements that will be completed, either by the applicant directly or by CAHIE on the applicant's behalf.

DATA EXCHANGE FRAMEWORK

40

Starting a new application

- To start a new application, select "Start new application" on the welcome page.

- If you have already started, you will see an open application with the option to "Edit".

Submitting More Than One Application?

- Some Applicants may submit multiple applications on behalf of different Signatories.
- Users in GrantsConnect will see all the Applications they have created or contributed to in their profile.
- Each Application has an Application number that users can use to identify each Application.

DATA EXCHANGE FRAMEWORK

Adding contributors

- Once you have a started an application, you may then add a "second contributor" or "reviewer" from your organization .

- They will need to have their own account in GrantsConnect before you can add them.

- Select the Person+ Symbol to the left of "Manage Applicants."

DATA EXCHANGE FRAMEWORK

42

How to navigate to the next page

- Begin entering your organization information as requested and use the tabs at the top of the screen to navigate between sections.

FORM QUESTIONS

Complete the required fields below.
Program is accepting applications

Download

Introduction | Applicant Information | Signatory Characteristics | Signatory Characteristics 2 | Signatory Characteristics 3 | Proposed Activities and Fun... | More ∨

DSA Signatory Grants Application

This DSA Signatory Grants Application is for the DSA Signatory Grant Program, a component of the Data Exchange Framework (DxF) Grant Program. Administered by the California Health and Human Services (CalHHS) Center for Data Insights and Innovation (CDII), the DSA Signatory Grant Program supports Signatories of the DxF Data Sharing Agreement (DSA) by subsidizing investments to meet DSA requirements. Prior to beginning an Application, please review the **DSA Signatory Grant Guidance Document** for a comprehensive overview of the program.

DATA EXCHANGE FRAMEWORK

Saving an application

- GrantsConnect will auto-save your application as you go.

- To save your progress and return to your application later, click the Save button and then log out.

Completing your proposed activities and funding request

- As you are completing the budget request, please articulate clear line items.

- For each line item you will need to include a description, a type of expense, and the amount requested.

How many resources do you need to identify?*

2

Type of Resource	Resource Description	Budget Request

Type of Resource 1*

Resource Description 1*

Budget Request 1*

$ USD

1 word

30 words maximum

Type of Resource 2*

Resource Description 2*

Budget Request 2*

$ USD

1 word

30 words maximum

Total TA Funding request*

$ 0.00   USD

DATA EXCHANGE FRAMEWORK

45

How to upload attachments

- During your application process, you may be required to upload supporting documentation (i.e. the signature page or for applications include 10+ Signatories).

- You will select the approved **document type** from the drop-down menu and click to **upload a file**.

- You will see confirmation that your document has been uploaded.
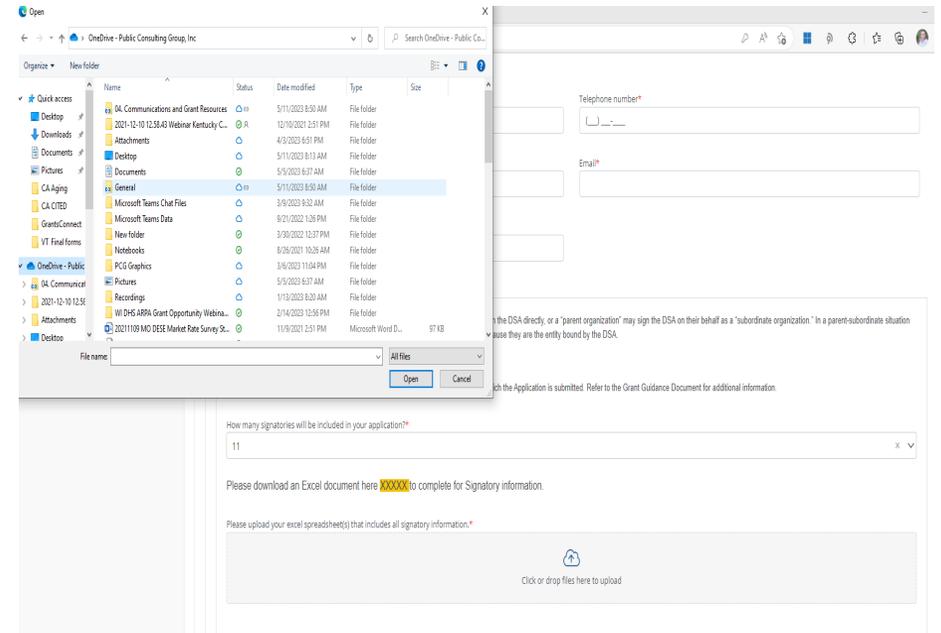
Please upload your excel spreadsheet(s) that includes all signatory information.*

Click or drop files here to upload

Test upload document.docx

Review and submit the application

- Your application will be submitted once you sign your name on the *Attestation* page and click **Submit** at the bottom of the page.

    - If your application contains multiple Signatories, you will have to provide signatures from each.
    - Applicants can do this by working with Signatories to sign a separate attestation document, and uploading that into the DxF Grant Portal.

- You will have access to view submitted information once your application has been submitted, however you will not be able to make changes.

DATA EXCHANGE FRAMEWORK

47

LIVE APPLICATION DEMO
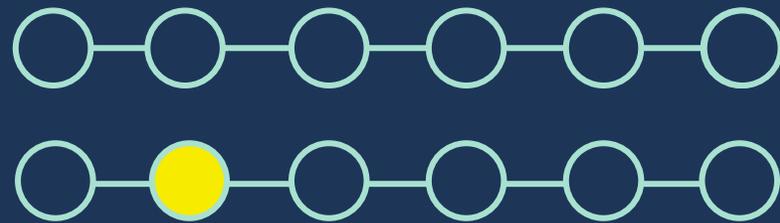
What To Expect After You Submit An Application

(For QHIO Onboarding and TA Grant Applicants)
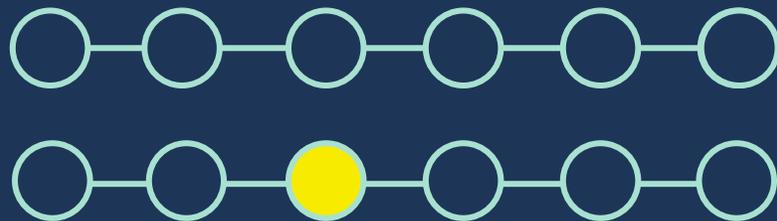
What happens after I submit an application?

1.   Once submitted, you will not be able to revise your application unless specifically requested by CDII or PCG.

     Please email **DSAGrants@pcgus.com** if you have a question once your application has been submitted.

2. Upon submission, the Point of Contact and PCG will receive a confirmation that the application has been submitted.

3. Applications will be reviewed and evaluated by PCG according to criteria developed by CDII. The PCG will provide CDII with recommended applications for CDII approval, with CDII making the final decision of approval or denial.

4. Applicants will be notified of the decision via email.
     CDII and PCG expect to announce award determinations for initial rounds within approximately two months of the close of the round.

5. If awarded, complete grant contracting.

DATA EXCHANGE FRAMEWORK

Check the status of your application

- Draft - The application has been started and saved but not yet submitted.

- Awaiting Review - The application has been submitted, and it has not yet been reviewed.

- In Progress - The review process is in progress, and a grants administrator has saved a review for this application.

- On Hold - A grants administrator requested a revision.

- Approved - The application has been approved. It may or may not have awards or payments at this stage.

- Declined - The application has been declined.

WI HCBS ARPA Grant
Kacie Testing

● Draft

WI HCBS ARPA Application 2   📄 Draft saved on Jul 18, 2022

Created on Jul 18, 2022   Manage application

DATA EXCHANGE FRAMEWORK

Responding to revision requests

- You may edit a draft application or an application that has been sent back to an applicant by the review team for revisions or clarification.
  - See the guidance document for scenarios where PCG may request revisions to applications.
  - Applicants will have five days to respond to revision requests.
- You can find your application by logging into the applicant portal.
- On the initial screen, select "View all my applications."

DATA EXCHANGE FRAMEWORK

52

How will my application be evaluated?

Applications will be scored and evaluated based, in part, on the following information:

- ❑ Characteristics of the Signatories, including:
  - ❑ The population served - organizations providing services to underserved and rural populations will be prioritized
  - ❑ Organizational need/current HIE capacity

- ❑ Efficient use of funds

- ❑ Ability to meet DSA requirements

- ❑ Ability to maintain DSA requirements

DATA EXCHANGE FRAMEWORK

53

How to report progress and receive funds

Awarded applicants will be required to submit quarterly progress reports detailing movement toward goals, purchases made, challenges encountered, and milestones **accomplished**

Two payment milestones exist, each of which requires attestation that the qualifications for the milestone have been met

Funds will be disbursed for completed milestones

DATA EXCHANGE FRAMEWORK

Wrap-up
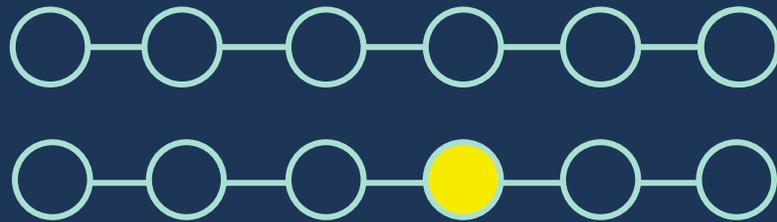
Questions?

For Written Questions

Logged into Zoom

If you logged on via Zoom interface

Type your question in the Q&A and presenters will address in the Q&A or verbally (time permitting).

If your question was not answered during the session and you would like to follow up with CDII, please submit it to cdii@chhs.ca.gov.

For Spoken Questions

Logged into Zoom

If you logged on via Zoom interface

Press "Raise Hand" in the "Reactions" button on the screen

If selected to ask your question, you will receive a request to "unmute;" please ensure you accept before speaking

Phone Only

If you logged on via phone-only

Press "*9" on your phone to "raise your hand"

Listen for your phone number to be called by moderator

If selected to ask your question, please ensure you are "unmuted' on your phone by pressing "*6"

DATA EXCHANGE FRAMEWORK

Announcement

CDII will begin accepting DSA Signatory Grant Applications for eligible Round 1 Signatories shortly.

Qualified Health Information Organization (QHIO) Onboarding Grant	Technical Assistance (TA) Grants
1. Email CAHIE **grantsupport@cahie.org**, and include your contact information. 2. Work with CAHIE to complete and submit the application.	1. Log into the **DxF Grant Portal** and complete your application 2. Access application support if needed: **DSAGrants@pcgus.com**

DATA EXCHANGE FRAMEWORK

Who to contact with questions

➢ For questions about TA Grants or the DxF Grant Portal, contact PCG at DSAGrants@pcgus.com.

➢ For questions about applying for QHIO Onboarding Grants, contact CAHIE at grantsupport@cahie.org, and provide your contact information.

➢ For questions about the DxF or your grant eligibility and options, contact one of the DxF Educational Initiative Grantees (see Appendix).

➢ For other questions, contact CDII@chhs.ca.gov with "Grant Inquiry: " in subject line.

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Now, how familiar are you with the DSA Signatory Grants?

Vote in the Zoom poll.

1

Not Familiar

This is my first time hearing about it.

2

Slightly Familiar

I've heard about it in other forums or webinars, but am not familiar with any details.

3

Familiar

I know the basics, but don't think I have a clear understanding of it and could use another overview.

4

Very Familiar

I've been to all the webinars and read the guidance document... but I have some questions.

5

I'm **ready to apply** – thanks for showing me how!

DATA EXCHANGE FRAMEWORK

59

After hearing the information provided today, how likely are you to apply for this grant?

Vote in the Zoom poll.

1 — *Very Unlikely* **2** — *Unlikely* **3** — *Unsure* **4** — *Likely* **5** — *Very Likely*

DATA EXCHANGE FRAMEWORK

Stay involved

1   Join our next *Information is Power* webinar on June 22, 2023 from 1:00 PM – 2:00 PM PT

2   Participate in IAC and DSA P&P SC meetings.

- Joint DSA P&P and IAC Meeting #7: June 5, 2023, 10:30 AM to 1:00 PM

Meeting materials, participant information, and recordings will be posted on the CalHHS DxF website

3   Join the mailing list by emailing cdii@chhs.ca.gov

CDII welcomes suggestions for future webinar topics.

DATA EXCHANGE FRAMEWORK

THANK YOU

If you have additional questions about the DSA Signatory Grants or we did not get to your question today, please contact us!
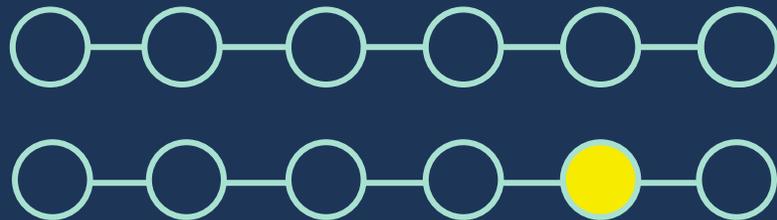
Appendix
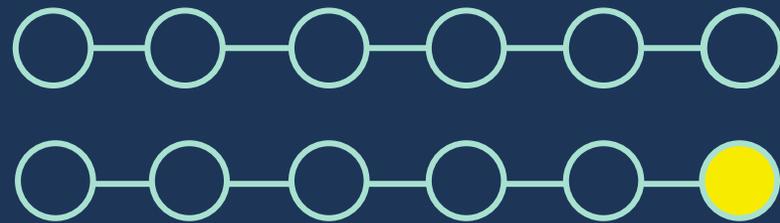
Educational Initiative Grantees

Eight grantee associations are providing direct and tailored education to various DxF participant groups.

Educational Initiatives Grantees		Signatory Type
Multi-Association Initiative led by America's Physician Groups (APG)	DxFeducation@connectingforbetterhealth.com	Physicians (Group Practices/Family Physicians/etc.), Aging Providers, Skilled Nursing Facilities (includes nursing homes and ICFs), Health Information Exchanges
California Medical Association	DxFQuestions@cmadocs.org	Physician Organizations, Medical Groups
California Primary Care Association	grants@cpca.org	FQHCs
The County Health Executives Association of California	mgibbons@cheac.org	Local health departments
California Association of Health Plans	info@calhealthplans.org	Health insurance plans
Leading Age California Foundation	info@leadingageca.org	Skilled Nursing Facilities, Health Plans, Community-Based Organizations
American Academy of Pediatrics, California Chapter 1	projectcoordinator@aapca1.org	General acute care hospitals, Physician organizations and medical groups, Acute psychiatric hospitals, Community-based organizations providing social services, Behavioral health providers, County health, social services, and public health, Other health care entities
California Council of Community Behavioral Health Agencies	response@cccbha.org	Community-Based Organizations Behavioral Health Providers

You can also reach out to CDII directly at cdii@chhs.ca.gov.

Key Concepts

Signatory

A **Signatory** is defined as an organization that has signed the DSA. Organizations may sign the DSA directly, or a "parent organization" may sign the DSA on their behalf as a "subordinate organization."

A subordinate organization is considered a Signatory for the purpose of the DSA Signatory Grant Program.

Applicant

An **Applicant** is the organization that submits the Application for a DSA Signatory Grant. An Applicant may be a Signatory applying on its own behalf, or it may be an organization apply on behalf of one or multiple Signatories (referred to as an Umbrella Applicant).

Applicants are referred to as "Grantees" if they receive a DSA Signatory Grant.

Instance

An **Instance** represents a singular configuration for an electronic record system product -- which may be an electronic health record (EHR) or otherwise* -- that may exist within and/or across multiple DSA Signatories included in the Application.

Organizations that **do not have an EHR should consider their current electronic record system.*

QHIO

A **Qualified Health Information Organization (QHIO)** is an HIO that has been "qualified" by CDII based on its ability to meet DxF data exchange requirements.

TA

Technical assistance is technological or operational support for an organization and can comprise a range of activities.

DATA EXCHANGE FRAMEWORK

Details on Baseline Funding Maximums

An applicant can request up to the funding maximum for every **Instance** in its application.

Instance — An **Instance** represents a singular configuration for an electronic record system product -- which may be an electronic health record (EHR) or otherwise* -- that may exist within and/or across multiple DSA Signatories included in the Application.

Organizations that do not have an EHR should consider their current electronic record system.

Type of Primary Signatory Using the Instance	Baseline Funding Maximums
▪ General Acute Care Hospitals ▪ Acute Psychiatric Hospitals ▪ Skilled Nursing Facilities	**$50,000**
Physician Organizations and Medical Groups	**$35,000**
Health Insurance Plans	**$25,000**
Clinical Laboratories	**$15,000**
Other DSA Signatories	**$25,000**

- For Instance used by multiple Signatories in the Application, funding is based on the *Primary* Signatory (ie the Signatory serving the largest number of people).

- Primary Signatories meeting certain criteria may be eligible for more funding. See the DSA Signatory Grant Guidance Document.

- Regardless of Signatory characteristics, the total potential Application maximum is $500,000.

DATA EXCHANGE FRAMEWORK

Opportunity for Enhanced Funding

CDII recognizes that some Signatories may require additional funding due to limited resources. To address this need, some **Instances** may be eligible for **enhanced funding maximums** if the Primary Signatory in that Instance meets certain criteria.

Type of Primary Signatory Using the Instance	Enhanced Funding Maximum	Primary Signatory Meets the Following Enhanced Funding Criteria
▪General Acute Care Hospitals ▪Acute Psychiatric Hospitals ▪Skilled Nursing Facilities	**$100,000**	☑ **Serving Underserved Communities** Primary Signatory serves Californians in marginalized populations (as measured by volume of Medi-Cal, dual, and uninsured) and/or underserved and/or underfunded geographic areas (as measured by the Healthy Places Index). ☑ **No Cal-HOP Funding** Primary Signatory has <u>never</u> received Cal-HOP Funding.
Physician Organizations and Medical Groups	**$50,000**	
Health Insurance Plans Clinical Laboratories	**Not Eligible**	
Other DSA Signatories	**$50,000**	

DATA EXCHANGE FRAMEWORK

Funding Request: Scenario 1

An Applicant with a Single Instance and Organization

```
┌─────────────────────┐
│      Applicant      │
└─────────────────────┘
           │
┌─────────────────────┐
│     Instance 1      │
└─────────────────────┘

┌─────────────────────┐
│    Medical Group    │
└─────────────────────┘
```

The Single Organization Applicant is eligible to make **one** funding request.
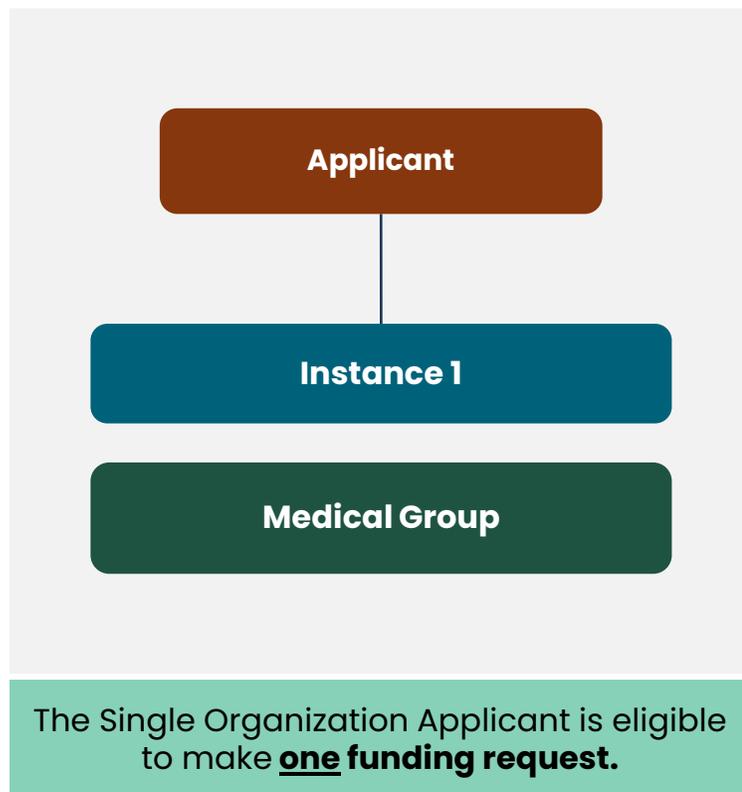
Funding Request Calculation	
	Funding Max
Instance 1	$35,000 (Base Funding)
Application Total Max:	$35,000

Organizations that **do not** have an EHR should consider their current documentation system an instance. DSA Signatory Funding can be used to subsidize the purchase of an EHR through the TA Grant.

Key:

	Primary Signatory for Instance
*	**Meets Serving Underserved Community & No Past HIT Funding Criteria**

DATA EXCHANGE FRAMEWORK

Funding Request: Scenario 2

Multiple Instances Covering Multiple Signatories

Funding Request Calculation

	Funding Max
Instance 1	$50,000 (Enhanced Funding)
Instance 2	$50,000 (Base Funding)
Application Total Max:	$100,000

In this scenario, a CBO would be eligible to receive funding in the first two rounds since it shares an instance with a signatory that is eligible for Round 1 & 2 funding.

Applicant

- **Instance 1**
- **Instance 2**
  - **Medical Group** *
  - **Hospital**
  - **CBO** *
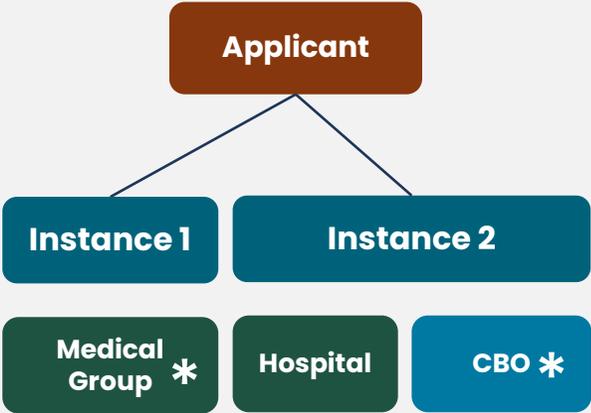
The Umbrella Org is eligible to make **two** funding requests.

Key:

	Primary Signatory for Instance
*	Meets Serving Underserved Community & No Past HIT Funding Criteria

DATA EXCHANGE FRAMEWORK

Funding Request: Scenario 3

Multiple Instances Covering Multiple Signatories
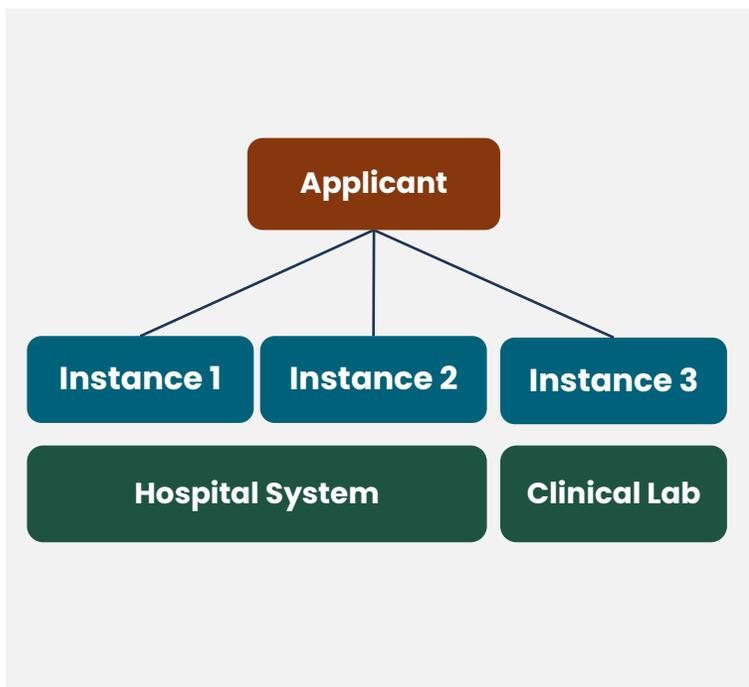
The Umbrella Org is eligible to make **three** funding requests.

DATA EXCHANGE FRAMEWORK

Funding Request Calculation	
	Funding Max
Instance 1	$50,000 (Base Funding)
Instance 2	$50,000 (Base Funding)
Instance 3	$15,000
Application Total Max:	$115,000

Key:

	Primary Signatory for Instance
*	**Meets Serving Underserved Community & No Past HIT Funding Criteria**

TA Grant Milestones Deliverables

The "*build your own*" pathway.

Applicant has identified funding uses for their TA Grant. → **Milestone 1** → **Milestone 2**

Funding Uses	Document Demonstrating a Procured Resource	Proof of Final Deliverable
Support for Identifying and Contracting with a Technology Solution.	• Contract for external resources; or • Signed attestation from Grantee for internal resources.	• Contract with HIT vendor
Implementing a Technology Solution Capable of Supporting Real-Time Data Exchange	• Contract for external resources; or • Signed attestation from Grantee for internal resources.	• Screenshot of ADT Feeds demonstrating a real-time data exchange
Adjusting, Upgrading, or Adopting a Certified EHR or Other Electronic Documentation System	• Contract	• Signed attestation from Grantee
Creating and Providing Training for New Workflows	• Signed attestation from Grantee	• Copy of training and/or technical assistance materials

DATA EXCHANGE FRAMEWORK

Resources

- Got questions?

  - For questions about the DxF broadly, contact CDII@chhs.ca.gov
  - For questions about applying for TA Grants, contact DSAGrants@pcgus.com
  - For questions about applying for QHIO Onboarding Grants, contact grantsupport@cahie.org

- DxF Homepage

- DxF FAQ

- DSA Signatory Grant Application Guidance

- DxF Grant Portal

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