



**California Health & Human Services Agency
Center for Data Insights and Innovation
Data Exchange Framework (DxF) Information is Power Webinar Series: Applying
for Data Exchange Framework (DxF) Grants and Other DxF Program Updates
Webinar #8 Transcript (10:00 AM – 11:00 AM PT, April 18, 2023)**

The following text is a transcript of the April 18 Data Exchange Framework Information is Power Webinar Series: *Applying for Data Exchange Framework (DxF) Grants and Other DxF Program Updates*. 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.

[Emma P - Events] 13:00:31

Hello, and welcome my name is Emma, and I'll be in the background answering any zoom technical questions.

[Emma P - Events] 13:00:37

If you experience difficulties during this session, please type your question into the during today's event, live closed.

[Emma P - Events] 13:00:43

Captioning will be available. Please click on the CC.

[Emma P - Events] 13:00:45

Button at the bottom of your zoom window to enable or disable and please welcome our first speaker, Deanne McCallen, at Cdi.

[DeeAnne McCallin] 13:00:53

Hi! Thank you, Emma. I'm DM accountin.

[DeeAnne McCallin] 13:00:57

The deputy director with Cdi working on the data extchange framework.

[DeeAnne McCallin] 13:01:03

Thank you for joining us today, for those of you who are joining us for the first time.

[DeeAnne McCallin] 13:01:08

This is the information is power. Webinar Series, where we're here to discuss the data exchange framework.

[DeeAnne McCallin] 13:01:17

We covered the framework, the sharing agreement, the data sharing agreement and policies and procedures and the programs that we're developing to support the implementation.

[DeeAnne McCallin] 13:01:26

Each webinar that we host is recorded and posted to our website along with the presentation slides.

[DeeAnne McCallin] 13:01:34

And, as you can see on today's slide, this is currently webinar number 8 in this series.

[DeeAnne McCallin] 13:01:43

At any point during the webinar. Please feel free to see your questions through the zoom function at the end of the presentation.

[DeeAnne McCallin] 13:01:52

Our team will be able to select questions from the Q. And A to answer live if time permits, and if your question is not answered, live, and you would like to follow up with us.

[DeeAnne McCallin] 13:02:05

Please submit your question to the email address Cdi at Chh. S.

[DeeAnne McCallin] 13:02:11

Dot Ca, dot go v, and that's where we have a whole team of folks who feel the inbox for that, and get responses out.

[DeeAnne McCallin] 13:02:23

They are, will be additional opportunities to ask questions. We have different meetings.

[DeeAnne McCallin] 13:02:30

We have a data sharing agreement, which is Dsa signatory Grants.

[DeeAnne McCallin] 13:02:37

Webinar scheduled for meet sixteenth.

[DeeAnne McCallin] 13:02:40

We're planning this to be more Town Hall style than presentation, though there will be pretty a fair amount of presentation, because it's a 2 h block.

[DeeAnne McCallin] 13:02:48

So 10, in the morning till noon on May sixteenth, and that will be webinar number 9 in this series.

[DeeAnne McCallin] 13:02:56

Review our forthcoming data exchange grant Framework Grants Program.

[DeeAnne McCallin] 13:03:00

FAQ. That you'll hear a little bit more about later in this presentation.

[DeeAnne McCallin] 13:03:05

That specifically address the Grant programs. You can reach out to our educational initiative grantees which I believe we have a slide on those, and we have a special guest today from one of our grantees to make sure you're all familiar with the initiative that's been going on since the beginning of this

[DeeAnne McCallin] 13:03:25

year, and runs through the entire calendar year, and as always, you can submit questions to the Cdi inbox, which is Cdi.

[DeeAnne McCallin] 13:03:33

At chs.ca.gov.

[DeeAnne McCallin] 13:03:38

So today, joining me is Juliet Molen from Manette.

[DeeAnne McCallin] 13:03:44

Health strategies, who works very closely with Cdi. And as I've introduced myself, DM, and then we'll have a few other folks that will introduce middle of the deck today.

[DeeAnne McCallin] 13:03:59

Today we're gonna be covering the vision which we recap.

[DeeAnne McCallin] 13:04:03

Every one of these sessions for the data exchange in California. Talk about the progress updates, what we've been up to since the last time we have met covered the signatory grant program and wrap up with a.

[DeeAnne McCallin] 13:04:20

Alrighty! So on to the vision. I will read this slide once implemented across California, the data exchange framework will create new connections and efficiencies between health and social services.

[DeeAnne McCallin] 13:04:33

Providers, improving whole person, care the data, exchange framework is California's first, ever statewide data sharing agreement that requires the security and appropriate exchange of health and human services.

[DeeAnne McCallin] 13:04:46

Information to enable providers to work together and improve an individual's health and well-being.

[DeeAnne McCallin] 13:04:52

So the next few slides touch on some of the details that are in these vision statements.

[DeeAnne McCallin] 13:05:04

This is new today in the series that we're gonna be going back to some of the data exchange scenarios that the advisory group work done back in 2022 and 2020 21 and 2022 that to highlight them and to bring them back to the surface

[DeeAnne McCallin] 13:05:25

because a lot of folks are still just learning about the data exchange framework.

[DeeAnne McCallin] 13:05:29

So at the bottom of this slide there is a link to this document.

[DeeAnne McCallin] 13:05:33

Document number 4. I think it's about a 25 page document, but it has 6 different scenarios.

[DeeAnne McCallin] 13:05:41

And so it's I'm focusing on one where the scenario is focusing on acute or chronic health needs.

[DeeAnne McCallin] 13:05:50

So this is where the advisory group during this window of time work together to identify scenarios that are what the data exchange framework is driving to try to change.

[DeeAnne McCallin] 13:06:03

So this is showing that illustration of what happens in individual engages the primary care provider for treatment of hypertension and general health needs the individual engages with the pulmonologist for treatment.

[DeeAnne McCallin] 13:06:20

Of Copd. In this particular scenario the pulmonologist and the Pcp.

[DeeAnne McCallin] 13:06:26

Are both members of a data exchange intermediary in this case and shared the same electronic health record.

[DeeAnne McCallin] 13:06:35

S. So they're actually able to see the same medical record for the individual patient who is seeing them both.

[DeeAnne McCallin] 13:06:41

So they have a data sharing with an intermediary.

[DeeAnne McCallin] 13:06:46

The patient does also engage a gastro. Enterologists.

[DeeAnne McCallin] 13:06:52

A lot of syllables for me, especially from a referral from the Pcp.

[DeeAnne McCallin] 13:06:57

However, that specialist is not utilizing it. Exchange to exchange information.

[DeeAnne McCallin] 13:07:07

If anything, it's going through in that doctor is using fax, relying upon the patient to share back with their Pcp.

[DeeAnne McCallin] 13:07:16

What their appointment was about, whereas in this scenario it's, I think it's a 70 year old who might be confused for what they were talking to the pulmonologists about versus the gastroenteologist so this is showing where the gap if anything

[DeeAnne McCallin] 13:07:33

if I had thought of it earlier, I probably would have put a red X from Box 5, showing that there's a disconnect and a silo of the data.

[DeeAnne McCallin] 13:07:42

So this is hopefully trying to share with you all a picture of what we are looking to try to change by building out this by laying out the rules of the road with the framework.

[DeeAnne McCallin] 13:07:55

And so to advance and encourage the exchange of information and break down the silos.

[DeeAnne McCallin] 13:08:01

And it's a great document to go and look at. And over the next upcoming Webinars will be featuring the different exchange scenarios that the advisory group came to the table with a lot of expertise and experience highlighting these different scenarios.

[DeeAnne McCallin] 13:08:21

Alrighty! What we have been up to since we met last month.

[DeeAnne McCallin] 13:08:25

So governance cdi facilitated a joint implementation advisory committee and a data sharing agreement policy and procedure Subcommittee meeting on March 20, first,

where we reviewed adjustments to the draft policies and procedures that public comment was accepted

[DeeAnne McCallin] 13:08:44
up through February fourteenth, and we discussed the Qh.

[DeeAnne McCallin] 13:08:47
I/O program, the Qualified Health Information Organization program and signatory Grants.

[DeeAnne McCallin] 13:08:54
We are facilitating another meeting next week.

[DeeAnne McCallin] 13:08:58
The months go by quickly. April 20, fourth. So I believe that's Monday.

[DeeAnne McCallin] 13:09:03
We are working fairly, consistently on policies and procedures.

[DeeAnne McCallin] 13:09:08
The development of new ones, and for amending one or 2 that were one that was finalized last year in July.

[DeeAnne McCallin] 13:09:17
As we're moving along, finding things to improve upon, and certain policies and procedures that the time to build them out, such as a policy and procedure for the Qhio program last summer that program did not really essentially even exist, though we had the guidance from the advisory group and the

[DeeAnne McCallin] 13:09:39
establishment of the framework to create that working on the data exchange framework grants.

[DeeAnne McCallin] 13:09:45
This week we will be releasing a comprehensive signatory grant program guidance it's had a lot of folks participate in the creation of.

[DeeAnne McCallin] 13:09:55
And then that health leading a very strong guidance document that should help a lot of folks, and we will be presenting on that today and May sixteenth.

[DeeAnne McCallin] 13:10:03
And then the Qhio program. So the criteria at the March meetings we're discussed and we'll be releasing the Qhio application for public comments for the organizations that are looking to apply.

[DeeAnne McCallin] 13:10:19

There's going to be another draft application released potentially this week for being able to get us on the timeline to advance and stand up the Qhio program.

[DeeAnne McCallin] 13:10:32

Back to the other. The previous slides in the vision about signing the data, sharing agreement.

[DeeAnne McCallin] 13:10:39

There are 6 entity types who were listed in the statute for regards to sign general acute care, hospitals, position, organizations, and medical groups, skilled nursing facilities, health care service plans and insurance clinical laboratories, and acute psychiatric hospitals.

[DeeAnne McCallin] 13:10:59

I went pretty quickly through that list. But you can find them in our Faqs.

[DeeAnne McCallin] 13:11:05

On our website in this slide deck organizations are required to sign by January 30.

[DeeAnne McCallin] 13:11:10

First regardless as to when they might need to begin exchanging data.

[DeeAnne McCallin] 13:11:15

So those are some of the other details that may or may not be in a slide, for so how do you sign?

[DeeAnne McCallin] 13:11:22

There is a data sharing agreement signing portal. It is still open.

[DeeAnne McCallin] 13:11:27

We had a deadline implementation of January 30. First, however, folks are encouraged to still go in and sign there's a lot of people out there still, just learning about the data exchange framework.

[DeeAnne McCallin] 13:11:38

There, so you can go in and register to start.

[DeeAnne McCallin] 13:11:41

You need an account on the portal fairly easy to set up, and there's help, features and information and contact information.

[DeeAnne McCallin] 13:11:48

If you need any guidance to find more information.

[DeeAnne McCallin] 13:11:53

If you think that steps going a little too far out in front for what you know about the data exchange framework, you can go to our website.

[DeeAnne McCallin] 13:12:00

You can pull down a copy of the data sharing agreement, which is the online agreement that is in the portal.

[DeeAnne McCallin] 13:12:08

But you can get that out, print it, get it as a Pdf.

[DeeAnne McCallin] 13:12:12

Share it with your organization for review. You can read the policies and procedures, whether their final or draft.

[DeeAnne McCallin] 13:12:21

The Faqs are. There's a link to that on our website, and there's a of these types of meetings whether they were town halls, listening sessions, or part of the information as Power Webinar series, including the lac meetings and the subcommittee meetings there's a lot

[DeeAnne McCallin] 13:12:37

of material there for diving into the deep weeds.

[DeeAnne McCallin] 13:12:41

If you're interested, and there's also a list of who has signed the data sharing agreement.

[DeeAnne McCallin] 13:12:46

If you have any questions, please, email us, and also on this slide is the link to the signing portal.

[DeeAnne McCallin] 13:12:52

If you have any problems reaching that, you can also email the Cbi mailbox and we'll make sure the right people get to it.

[DeeAnne McCallin] 13:13:01

Are ready. So a number of you have signed. We thank you for that.

[DeeAnne McCallin] 13:13:07

Following the rules as they are. And now you might be wondering now what so their you have an opportunity to apply for signatory grants.

[DeeAnne McCallin] 13:13:16

So some of the grants that are available from funds that are available in the fiscal 2223 and 2324 fiscal years for California.

[DeeAnne McCallin] 13:13:27

That funding is out there, and you must have signed a data sharing agreement to be eligible to apply for that.

[DeeAnne McCallin] 13:13:34

And there's technical assistance or qualified hio onboarding types of grants.

[DeeAnne McCallin] 13:13:42

More on that to come. You can reach out to the educational grantees.

[DeeAnne McCallin] 13:13:45

Those are the folks where we have one of them joining us today.

[DeeAnne McCallin] 13:13:49

And there's 8 different entities that are doing a lot of outreach and holding a lot of different sessions.

[DeeAnne McCallin] 13:13:55

And doing great educational work on behalf of Cdi.

[DeeAnne McCallin] 13:14:01

Throughout this entire calendar year, and we do have a list of them in our Faqs and a link in the slide deck.

[DeeAnne McCallin] 13:14:08

The deck will be posted within a couple of days after this session, and then prepare to meet the data, exchange expectations.

[DeeAnne McCallin] 13:14:15

So, after signing, you should be looking at the data sharing agreement and the policies and procedures.

[DeeAnne McCallin] 13:14:23

Those are the terms and conditions and the information about how to exchange most entities required to sign need to begin exchanging, actually implementing the exchange of information on or before January 30, first, 2024 and some entities have a 2 year carve out on

[DeeAnne McCallin] 13:14:44

that where they have, 2 years after that to implement.

[DeeAnne McCallin] 13:14:51

Alrighty. So now I'm moving into the Grant program.

[DeeAnne McCallin] 13:14:55

I have no idea if I'm going faster slow, we will see.

[DeeAnne McCallin] 13:15:01

I think going great alrighty. So the Grant program 50 million dollars!

[DeeAnne McCallin] 13:15:09

So I mentioned the fiscal years. For 2 years, 30 years, funding out there.

[DeeAnne McCallin] 13:15:14

And it's we were standing the programs up right now.

[DeeAnne McCallin] 13:15:19

We have a couple of different entities working with us, and a lot of folks in Cbx.

[DeeAnne McCallin] 13:15:24

As well supporting the grant funding programs. So the different external entities to support health information exchange onboarding for organizations who do not actively share information through health information, intermediaries, technical assistance for small under-resourced providers and technical assistance in education

[DeeAnne McCallin] 13:15:46

for organizations who are new to health information exchange, especially those who are required to buy the statute a.

[DeeAnne McCallin] 13:15:54

B, 133 or Hsc health safety code 1, 3, 0, 2, 9, 0. To sign the data sharing agreement.

[DeeAnne McCallin] 13:16:06

Just checking to see if I have anything to go before moving on.

[DeeAnne McCallin] 13:16:18

To ensure that the program addresses the critical barriers to the data exchange framework implementation back in October we hosted 2 Grant program listening sessions.

[DeeAnne McCallin] 13:16:29

They were very interactive, and they were very well attended.

[DeeAnne McCallin] 13:16:32

We appreciate everybody who contributed to that. So we laid out the purpose.

[DeeAnne McCallin] 13:16:37

We sought to understand the barriers to implementation for signatories and to identify opportunities to address those barriers.

[DeeAnne McCallin] 13:16:45

We collected feedback from the attendees on the format by having a lot of written and verbal and polling participation.

[DeeAnne McCallin] 13:16:55

During that time, and the sessions were open, where 326 individuals attended one of the 2 listening sessions.

[DeeAnne McCallin] 13:17:03

So we did have a lot of engagement in those settings. And it, those helped to shape the programs that were standing up this spring.

[DeeAnne McCallin] 13:17:13

The goals of our program are to support data, exchange framework implementation in under resourced geographies and or serving historically marginalized populations and underserved communities.

[DeeAnne McCallin] 13:17:26

This is part of how the funding was allocated to us to be able to stand up these programs, and we are honoring that if they we AIM to address significant barriers to data, exchange framework implementation, be those operational technical or other for the signatories of the data

[DeeAnne McCallin] 13:17:46

exchange framework and we're being mindful to align across other grant programs and promote activities that are in that are ineligible for funding by other grant programs.

[DeeAnne McCallin] 13:17:59

Pastor, presence, so we're looking to not re spend to spend funds on technical assistance to the same folks who have benefited from other programs.

[DeeAnne McCallin] 13:18:11

Especially during the high-tech era. The funding that was provided by both the Federal Government and the State.

[DeeAnne McCallin] 13:18:19

But we're being very mindful of who is actually exchanging today, and who needs the help in the programs that we're standing up.

[DeeAnne McCallin] 13:18:28

As mentioned, we have educational grantees who are providing funding to associations and their partners.

[DeeAnne McCallin] 13:18:35
These are folks that allow.

[DeeAnne McCallin] 13:18:39
Entities out there have worked with for a long time. They're your trusted advisors, and we are leaning on them by way of having contracted with a different entities to do outreach and work and help us to identify things that we might need to improve upon to everyone get to the

[DeeAnne McCallin] 13:18:59
implementation of data exchange by that January 30.

[DeeAnne McCallin] 13:19:02
First 2024 and 2020 deadline.

[DeeAnne McCallin] 13:19:08
This slide deck does have a list of the 8 entities, their primary email response.

[DeeAnne McCallin] 13:19:13
For this specific data exchange framework efforts and the different types of signatories that these entities are focusing on to help.

[DeeAnne McCallin] 13:19:25
So if you haven't heard or attended any of their sessions or webinars, or presentations, and say, your health insurance plan, then we encourage you to reach out to the email that is, on this slide and say, Hey, I'd like to learn about the data exchange framework.

[DeeAnne McCallin] 13:19:41
Can you tell me when you are holding certain activities? Just one example? There?

[DeeAnne McCallin] 13:19:48
And then today with us, we're joined by one of those 8 entities.

[DeeAnne McCallin] 13:19:53
So I'd like to invite Lisa chance fun to join us.

[DeeAnne McCallin] 13:19:59
Who is with the multi-sassiation initiative to let you know, and examples of some of the outreach and education that they are working alright.

[DeeAnne McCallin] 13:20:07
Lisa, are you there?

[Lisa Chan-Sawin] 13:20:08
Good morning, Deanne. Can everybody hear me?

[DeeAnne McCallin] 13:20:12
I can. Yes.

[Lisa Chan-Sawin] 13:20:13
Awesome. Thank you so much. And it's really a pleasure to be here with everyone today.

[Lisa Chan-Sawin] 13:20:18
I'm here on behalf of the Multiassociation.

[Lisa Chan-Sawin] 13:20:22
Dxf. Education initiative we're here representing Apg, the California Association of Family Physicians, the California Association of Health Facilities, K.

[Lisa Chan-Sawin] 13:20:34
He high Pbgh. At Cqc. C. 4. A.

[Lisa Chan-Sawin] 13:20:37
It's a collaborative of physicians, physician groups, aging providers, skill nursing facilities, hives, and the like.

[Lisa Chan-Sawin] 13:20:48
With this collaborative is supported in partnerships through 2 consulting firms, transform health as well as Blue Path.

[Lisa Chan-Sawin] 13:20:56
Health next slide, please. And so our objectives really are to leverage economies of scale and develop targeted initiatives, supporting and educating some of our key constituencies.

[Lisa Chan-Sawin] 13:21:13
But we also use a broad brush. Approach because we recognize how important it is for there to be broad participation in the Dxf, and so where, using and creating a broad multi stakeholder comprehensive platform for educating and supporting our required and optional signatories and we did

[Lisa Chan-Sawin] 13:21:35
a big kickoff this year at the insure. The uninsured Conference.

[Lisa Chan-Sawin] 13:21:41
It was very well attended, and we really are seeking opportunities for shared learning and partnership through our approach.

[Lisa Chan-Sawin] 13:21:49

We recognize, everybody needs to know about the Dxf. Be able to plug into a process for ongoing updates and implementation support next slide.

[Lisa Chan-Sawin] 13:21:58

Please, and so how are we going about the work we are working with our association partners to really leverage existing forums?

[Lisa Chan-Sawin] 13:22:09

We know everybody is busy. So working with our association partners, we focus on where they're engaging with their membership.

[Lisa Chan-Sawin] 13:22:20

And are there other ways where we can streamline the approach?

[Lisa Chan-Sawin] 13:22:25

So, if there is an existing forum, existing meetings existing newsletters, we want to leverage those to the extent possible, knowing that people are very busy, and they may not want to have multiple emails speaking towards the same thing.

[Lisa Chan-Sawin] 13:22:44

However, we also know that there needs to be both active and passive ways of engagement.

[Lisa Chan-Sawin] 13:22:51

So we've created an information hub really more of a one-stop shop to help lift up resources, trainings and needs all of this is backed up with a speaker's bureau which are experts as well as early adopters in different industry sectors who can speak to information

[Lisa Chan-Sawin] 13:23:10

exchange, the Dxf. Why, they've signed it, and how it's been helpful in their daily work.

[Lisa Chan-Sawin] 13:23:17

We support our our signatories through tailored materials, knowing that each association partner may need something different, but we are able to leverage economies of scale, knowing that there are similar messages that may work in one sector, and we can leverage, the learnings from one to support other

[Lisa Chan-Sawin] 13:23:40

sectors, and we bring everybody together through a coordinating council and regular office hours, with a legal attorney to answer questions for our association members.

[Lisa Chan-Sawin] 13:23:52

Each association meant is also a supported through an engagement manager, and so each Partner Association has an assigned engagement manager we do regular check-ins, and we work together to tailor any materials needed for the membership.

[Lisa Chan-Sawin] 13:24:10

We identify on a regular basis? What are the events that we are partnering on, that we're tabling?

[Lisa Chan-Sawin] 13:24:18

What are the webinars that we can work together to put on for their members?

[Lisa Chan-Sawin] 13:24:23

And as you can see on the bottom here, we're really using a multi-pronged approach, tabling a conferences, uplifting signatories as well as story banking.

[Lisa Chan-Sawin] 13:24:36

We tailoring materials and more, we're always happy to answer any additional questions, and you know we're not alone in this work.

[Lisa Chan-Sawin] 13:24:43

We work in partnership and shared learnings with other grantees as well.

[Lisa Chan-Sawin] 13:24:49

And you know, recognizing that this is all hands on deck is needed, and everybody needs to be engaged and supported throughout this journey. So happy to answer any questions. And back to you, Diane.

[DeeAnne McCallin] 13:25:02

Thank you, Lisa, and to that end this next slide has some of the resources.

[DeeAnne McCallin] 13:25:08

Just a sampling where leading age has an FAQ.

[DeeAnne McCallin] 13:25:13

Where their constituents, their members are, typically skilled nursing for facilities and acute care.

[DeeAnne McCallin] 13:25:20

Multi association, resource, micro site, that Lisa Jeff highlighted and Seema.

[DeeAnne McCallin] 13:25:27

Excuse me, has an explainer series in a fact sheet California Primary Care Association has a resource microwave to access.

[DeeAnne McCallin] 13:25:37

So all of these are public facing. And then there's also a list of upcoming events.

[DeeAnne McCallin] 13:25:42

So we will again be sharing this slide. But you should be able to find all this information and reach out to each of these entities.

[DeeAnne McCallin] 13:25:50

If you're looking for something, especially in in the upcoming days.

[DeeAnne McCallin] 13:25:54

To a these are tomorrow alrighty. And then with that I'm gonna be passing the baton over to Juliet Molen with Manhattan health to talk about supporting the Dsa signatories and in that grant technical assistance and qhio.

[] 13:26:13

Great. Thank you, Diane. So here you can see at the end spoke to the second core element of the Grant program which we call the Dsa.

[DeeAnne McCallin] 13:26:15

Sure!

[] 13:26:22

Signatory grants. These grants are intended to provide direct support to signatories of the data sharing agreement to subsidize their implementation efforts over the coming months.

[] 13:26:35

I'm going to today, walk through core guidance around what this Grant program looks like and how organizations will be able to apply for.

[] 13:26:45

I will also note for folks that may have joined a little bit late, and didn't hear of us at the top of the call.

[] 13:26:51

This week. Cdi will be posting on its website a detailed Grant guidance document that provides really the next several levels of detail down from what we're going to be sharing today and may answer a number of questions that you have but of course, feel free throughout today's presentation to drop any

[] 13:27:11

questions that you have in the, and we will endeavor to answer those at the end of today's session, and then the guidance document may also provide additional detail on the.

[] 13:27:24

So, with that, I'm going to dive in before we get into the Grant program itself, and the process for applying wanted to share with you all about 2 organizations that you should all be familiar with that part of the Bsa signatory grant Administration.

□ 13:27:44

So the first is public consulting group. Cbi have contracted with public consulting groups to be the third party, Grant, administrator for the Dsa signatory grant.

□ 13:27:55

They are going to be providing support for the broad administration and management of the program, which will include working closely with Cdi to develop and manage the actual application portal itself.

□ 13:28:09

To review applications as they come in, and to review funding requests from applicants, and then to manage the entire process of Grant, reporting, once individuals have received grants. So Pcg.

□ 13:28:23

Is going to be an important resource for applicants and grantees in this program.

□ 13:28:28

The second organization to be aware of is the California Association of Health Information Exchanges.

□ 13:28:34

Kay High has been contracted by Cdi to provide application writing, support for one of the domains in the Dsa Signatory Grant program, so we will talk about this quite a bit more detail in just a moment.

□ 13:28:49

But they will be assisting organizations in completing and submitting onboarding of Qaco onboarding grants, and they will also be conducting some targeted outreach to eligible signatories to help encourage and make sure people are aware of the grant programs.

□ 13:29:04

So with this background I want to share a little bit about our timeline, because I know this is always people's first question.

□ 13:29:11

Whenever we talk about the Grant program. When is this going to launch?

□ 13:29:14

So this program is going to be awarding up to 47 million dollars in funding across at least 3 rounds of funding.

[] 13:29:22

So Cdi is going to reserve funding so that it can do at least 3 rounds of funding additional rounds may occur, based on the volume of applicants in rounds 1, 3.

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But at minimum you can see here the plan to host 2 short rounds, and we'll talk about those in additional detail shortly to short round for ground for round one and round 2, and we'll talk about how those rounds are unique and distinct in a moment, and then a longer round that will

[] 13:29:55

be open for an entire quarter in queue 3 of this year, so exact to dates, we'll be announced as we get a little bit closer to the portal.

[] 13:30:03

One, but this gives you a good sense of the target timeframe.

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For all of this I noted that Cdi may hold additional rounds past the first 3 rounds, and that will really be dependent on the volume of applicants received in rounds one and 2 Cdi will provide notice before that last round of grant applications and they're

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there's additional detail on that. The guidance document, but it will be communicated out when the last round is made available.

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So that applicants have time to get, and are aware that it's the last round before it closes.

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One more piece, and then I'll really dive into the Dsa signatory.

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Grant program from an end to end perspective. I noted that we are going to be posting a guidance document this week on the website.

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That document has a lot of additional details about the Grant program, and it's going to be a key resource for applicants.

[] 13:31:04

Understanding that there is a real range of organizations that may apply for these.

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And so in this guidance document we have endeavored to really lay out what the process looks like, and the criteria parameters look like for different types of organizations and configurations about applications.

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We will also be posting the application template shortly.

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The our goal is to post the application, template for the Ca Grant domain and the Qhio Grant domain.

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The cycle explain in a moment. By the end of this month.

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And with that I'm going to dive into an overview of the Grant program itself.

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So the before we get into that process for applying who's eligible?

□ 13:31:49

And all of that. I do want to make sure that we have some alignment on some key terms and key concepts.

□ 13:31:54

But I will be using throughout the presentation today. These are also explained in additional detail in the guidance documents.

□ 13:32:02

So the first core piece is signatory. These are called Dsa signatory grants, as you'll see when we get into the eligibility section, a core element of being eligible for this grant is that the organizations applying for it has signed the Df how do we

□ 13:32:17

define that in this Grant program a signatory is defined as an organization that assigned the Dsa.

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But specifically we wanted to address the question we get sometimes about subordinate signatories here.

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We wanna acknowledge that organizations may sign the Dsa.

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Directly, or a parent organization may sign on their behalf.

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In that situation where an organization would be considered a subordinate organization, whose parent organization, signed on their behalf a subordinate organization is considered a signatory for the purpose of the Dsa Signatory Grant program.

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So an individual subordinate is going to be eligible for a grant. And there's a lot more detail on what that looks like in the Grant Guide and Stuff.

□ 13:33:03

An applicant is the organization that submits the application for the grant itself.

□ 13:33:08

This seems evidence, but what we want to really highlight here is that an applicant may be a signatory applying on its own behalf, or it may be an organization applying on behalf of one or multiple signatories referred to as an employee application so we're going to talk a

□ 13:33:26

lot about applicants here as distinct from signatories and this really speaks to the fact that an applicant can include can can apply on behalf of multiple signatories.

□ 13:33:36

And we'll talk about that, and then want to speak to this concept of the instance and this is going to become important when we talk about funding that the amount that an application is eligible to request is going to be determined based on whether the number of electronic record instances that they have in

□ 13:33:59

their organization. And so this is defined as a singular configuration of an electronic record system product which may be an electronic health record for a healthcare organization or another type of electronic record system.

□ 13:34:13

For perhaps a community-based organization, serving social services, providing social services.

□ 13:34:21

A qhio, and I'm almost done with my definitions here. A.

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Qh. I/O, which will talk about a fair amount in today's conversation.

□ 13:34:30

Is a qualified health information organization. This is a health information organization that has been qualified by Cdi, based on its ability to meet data exchange requirements required for the data exchange for work, and finally, technical assistance.

□ 13:34:44

This is technological or operational support for an organization and can be arranged so with these key concepts covered, I'd like to introduce the 2 core domains of the Grant Pro.

□ 13:34:59

So there are 2 domains that a signatory can choose to apply for in the Dsa signatory grant a signatory can choose to apply for a qualified health information organization onboarding Grant or Qhio onboarding grant this is the assisted pathway for applying for a dsa.

□ 13:35:22

Signatory grant. The earlier spoke to the fact that in October Cdi did listening sessions in which we gathered information from stakeholders all over the State to really understand what the needs were from from the Grant program and what some of the challenges might be in applying for

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grants one of the things that we that this domain does is really assist applicants in a number of different steps, including understanding their technological options through the Qhio program going through the grant application process through support from K high and the Grant management process itself, in which qhos actually receive and manage grant funds on

□ 13:36:03

behalf. So as you can see here in the Qa.

□ 13:36:07

Style onboarding Grant Domain. An applicant and a grantee in this domain.

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The outcome of their grant would be completing onboarding with a qhio that enables the signatories in the application to meet their Dsa requirements.

□ 13:36:23

The activities in order to achieve that outcome will be determined between the Qhio and the grantee.

□ 13:36:30

So the Qhio will actually help the grantee in identifying the technical and operational needs to ensure successful onboarding to the Qhio and Cdi is going to publish a list of Q.

□ 13:36:43

Hio options, that a signatory can select from. So in this domain applicants get support and understanding what their qhio options are, and then qhios, help them work out what the technical and operational steps are to achieve.

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The onboarding process for applications. As I noted earlier, Cdi had contracted with the calendar Association of Health Information Exchanges to actually complete applications, but applicants behalf so app applicants here will get assistance to the application process as in grant management again, this is an

□ 13:37:15

assisted process. The grantee contracted. Qh. I/O will actually be the entity that receives the funding from Cdi and then manages those Grant funds, including progress, reporting that we'll talk about.

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That is one option for applicants in this Grant program.

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The second option is the technical assistance grant. This is the build your own pathway.

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So this is where a grantee can really determine themselves.

□ 13:37:44

What are the range of technical and operational solutions that they need to achieve?

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Dsa require, in order to receive, to be awarded and receive funding from the Ta Grants.

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An applicant would need to achieve at least one of the following required out, so the options are either at the end of the grant, they will have identified and contracted with a technical solution. Option 2.

□ 13:38:12

They will have implemented a technology solution capable of supporting real time data exchange option.

□ 13:38:18

3, they will have adjusted, upgraded, or adopted an electronic documentation system or
4, they will have created or provided training for new workflows.

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And we're going to talk about more details.

□ 13:38:32

Here, the applicant will determine the range of activities that they need to complete in order to achieve these outcomes, the applicant will complete and fill out and submit the application themselves, and then, once they receive the award and become a grantee the grantee will receive the funds directly and manage the

□ 13:38:51

funds directly. So this is really a build, your own solution pathway, where the applicant is going to manage the entire process of determining what they need, applying for what they need, and then.

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Applicants are encouraged to look at both of these options, and determine what the best fit is for their organization.

□ 13:39:10

Prior to applying.

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Now that I've laid out the 2 Grant domains, I'm going to talk about the process of applying, including determining whether you're eligible, determining what are the eligible and permissible uses of funding in each of the grants determining the number of amount of funding that you can

□ 13:39:31

request actually going through the application process. And then, once awarded what the milestones and payments look like.

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So for eligibility. Here you can see there are 3 core elements to help an organization determine whether they are eligible for a grant to be eligible for either the Qa.

□ 13:39:49

Cycle, onboarding or Ta. Grant applicants must ensure that all signatories included in the application have signed the data sharing of agreement prior to submitting the grant.

□ 13:40:02

That's piece one. These 2. Is that all signatories included in the application must require additional support and capabilities to meet their Dsa requirements.

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So this means that call signatories included in the grant, and then the application.

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So cannot currently already be achieving all of their Dsa requirements.

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They have to demonstrate that they need to complete some level of operational, technical or technological activity in order to be able to achieve their Dsa report.

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And then the last piece here is for the first 2 rounds only, so you'll recall a few slides back.

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I spoke to the fact that there are 2 quick, expedited rounds at the beginning of the these are short.

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One month rounds conducted, beginning in May, through about mid-july.

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The intent of these rounds is really to support getting funding out as quickly as possible to organizations who are mandated under 81, 33, to sign and execute and implement the Dsa agreement for these organizations.

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Cdi is endeavoring to support them by getting funding to them as quickly as possible.

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Through this grant program and hosting the short, expedited rounds at the very beginning that will focus just on 6 different types of signatory organizations.

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So these are general acute care hospitals, physician organizations and medical groups, skilled nursing facilities, healthcare service plans and disability insurers, quantinical laboratories and acute psychiatric hospitals, these 6 types of organizations can apply in

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need first, 2 short rounds, all other signers of the Dsa.

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Can apply in the round 3, which is that long round that extends over the course of cute.

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So once an organization has determined that they are eligible for a grant, they're going to want to look at the options for their use of funding.

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So for an organization that wants to apply to the onboarding domain.

□ 13:42:07

This slide details the permissible and impermissible uses.

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I'm not gonna go through everything on each of these slides, just for the sake of time today, but at a high level the permissible uses must the biggest principle under permissible uses is that a.

□ 13:42:23

Q. And a signatory must agree on how, on how grant funds will be used to support. Qh.

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I/O on, and in order to receive the full payments. The Q.

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Hio has to complete onboarding for that signatory.

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Qaios may decide to use the funding in a great with the signatories.

□ 13:42:44

Agreement, to offset Qhio costs, which are listed here or to offset other costs associated with Qhio onboarding, which could include payments made to the signatory Ehr, or other electronic records system to enable connection of that system to the qhio or it may

□ 13:43:05

include paying for a technology consultant, or it staff at the signatory organization to support onboarding the core piece.

□ 13:43:12

Here is that the Q. Hio, and the signatory will agree on how that funding is going to be used, and in order to receive the full funding onboarding must be completed here, you'll see the impermissible uses of funding, and those really key ones to highlight here today.

□ 13:43:30

Are, that they may. The funding in this domain may not be used to support ongoing HIV operations in this domain.

□ 13:43:37

It may not be purchased to. It may not be used to purchase new Ehr technology to onboard, to a non-qualified Hio, or to change from one qhio to another.

□ 13:43:49

So with that I will take. I will move on to the uses of funding for Ca Grants.

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So a. Ca. Grant, funding the uses of Ca.

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Grant funding look significantly different than those for our qhio onboarding RAM.

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So you'll recall that a Ta grant is the build.

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Your own solution. You can implement a range of technical assistance and beat them, operational or technological activities in order to achieve your Dsa requirements here, we've listed out a very high level.

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Look at what the permissible uses of funding are in this domain.

□ 13:44:25

I'm going to encourage organizations interacting for the Ta Grants to refer to the Grant guidance documents that will be posted on the Cdi website this week.

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This be a more detailed list of what are eligible, permissible uses of funding underneath each of these categories, at a high level.

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Here you'll see the uses of funding can include procuring resources to help identify and contract with a technology vendor.

□ 13:44:52

To onboard to a technology solution that establishes real time data exchange to adjust or upgrade to an Ehr or other technology systems.

□ 13:45:04

It's doing. So it's necessary to achieve real time data exchange and then creating and providing, providing training on new workflows necessary to achieving Csa requirements.

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So all of this has a significant amount of additional detail in it.

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In the guidance document, which will be making available this week.

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And then here you can see impermissible uses of funding the highest and most important piece here that covers all of the that really is essential in understanding the permissible uses is that this grant grant funding and the ta grant may not be used for activities that do not

□ 13:45:43

support the signatory in achieving its Dsa requirement.

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So applicants in this domain will be asked to show how all of the activities in the Ta.

□ 13:45:53

Grant are going to help them achieve their Dsa requirements.

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Applicants in this domain also must use the funds for the activities that were specified in their application, and then they may not use the funding for ongoing subscription or recurring costs for an Hio and Hr or other health. It.

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Continuing on Cdi understands that organizations will benefit from guidance and instruction around how much they can apply.

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So. Cdi has established funding maximums that are based on the number of instances in an application.

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So again, I will remind folks that an instance is a distinct configuration of an electronic record system and there's additional details to help.

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You understand that definition, and what may qualify in the guidance documents for each instance included in the application.

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An organization is going, an applicant is going to be eligible for a certain amount of funding.

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This amount only indicates the amount that an organization can request in their application.

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It does not mean that Cdi will automatically award that amount.

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It is an indicator for applicants to understand how much they can request in their application.

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Here you can see for different types of organizations what the funding maximum is based on the number of instances in the application.

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So, if you have an instance where the primary organization, using that instance is a general acute care hospital, that instance will be eligible, for up to \$50,000 in.

□ 13:47:40

For example, if you have an instance where the primary organization, using that instance is a clinical laboratory, then they will be eligible, for up to 6.

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There is an opportunity for certain organizations to receive enhanced funding.

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The Cdi recognizes that some signatories may require additional funding due to limited resources.

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To address this Cdi has created an enhanced funding maximum for signatories that need 2 core criteria.

□ 13:48:14

So if an organization meets a criteria of serving underserved communities, and that organization did not receive funding from the Calhop program, which was an H.

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I funding program from the State of California. They may be eligible to receive an enhanced funding level.

□ 13:48:36

For their instance. So, for example, a skilled nursing facility that operates in an under served community and did not receive calhop funding, but may be eligible to receive up to a \$100,000 for the instance, that they use if they meet the criteria as outlined in the guidance document.

□ 13:48:58

So the process for applying. So we talked now about whether you're eligible, what you can apply for and how much you can apply for the last big piece.

□ 13:49:07

Here is, talk about how you apply. So for the Qa.

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O onboarding Grant domain. Again, you'll recall this is the assisted pathway, an organization applying in this grant domain would decide that it's ready, and it wants to onboard with a Q&A.

□ 13:49:23

In order to achieve its Dsa requirements. Going to look at the eligibility list and determine it's eligible for Qhio onboarding step 2 is going to be that that signatory submits a request for k-high to complete and submit an application on their behalf to

□ 13:49:40

the CD. To Cdi through Pcg.

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Grant. So in this particular situation, they're going to reach out to Kay High and Kay High is really going to work with them to complete the application and submit the application in the Grants portal.

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Once the application is submitted and complete in the Grant portal, Pcg.

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And Cbi will score that application. Make an award determination, and announce the award.

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One note is that in the first rounds of this program Cdi will not have yet announced the list of Qa.

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S. And so for any round or any applications submitted prior to the announcement of qhos signatories.

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Can apply for the Qhl onboarding domain, but leave the Qh.

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Undetermined, and then to determine and tell Cdi which qhio they will use once the Qhios are in. And again, there's additional information on what that process looks like in the guidance.

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The process for applying looks a little different. If you're a ta grant application again, you'll recall this is the build your own pathway solution.

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So step one similarly here, it's going to be a signatory.

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Decide that it needs technical assistance to achieve its Dsa requirements, and it determines that it's eligible for a T.

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In this case the signatory is going to identify all of the specific ta needs and resources that they need in order to achieve their Dsa requirements.

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And then they're going to themselves. Submit a Grant application through Pcg.

□ 13:51:24

PC, once that's submitted and completed. Pcg.

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And Cdi will review the application, score the application, and make a award determination, and then announce the award decision.

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So here you can really see the process for applying looks a little different for each Grant domain in the Ca Grant domain.

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The applicant itself is going through the whole process and submitting the application on the portal, whereas in the Qhio onboarding domain, K.

□ 13:51:52

-high is a resource for applicants and helping them go through the process.

□ 13:51:57

And this really just be to that distinction that we highlighted up at the top of the section today between an assisted pathway and a build, your own path.

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Coming to the last section today. So the Qaio onboarding milestones and payments.

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So once a grantee receives a grant and gets in a determination from Cdi and Pcg.

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That they have been awarded a grant, they will actually receive funds for that grant on a milestone based process.

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So what you can see here is that once an organization receives the grant, they will.

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They have 2 milestones that they need to achieve in order to release the funding for that grade.

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The funding is distributed evenly across both payments.

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So payment one is 50% of the grant total and payment 2 is the remaining 50% in the Qa.

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So onboarding domain milestone one will be having a contract signed between the signatory and a Qhio grantees must achieve milestone one within 12 months of the Grant Award.

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Once that milestone is achieved, funding will be released directly to the Qhio.

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So the qaio is going to be the one to manage the quarterly reporting, and they're going to be the one to actually receive the funding and go through all of the process of managing brands milestone.

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2 in the Qa. So onboarding domain is attestation of completed Qhio.

□ 13:53:31

Onboarding, and this milestone must be achieved within 24 months of Grant. Award.

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I guess one had some animation. There we go. So ta grant milestones and payments.

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So this is a little bit different than the Qa. Style.

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Onboarding mountains and payments in that the grantee are submitting their own progress reports again, this is the build your own pathway where where grantees want to manage the whole process.

[] 13:54:02

So grantees are going to submit their own quarterly reports.

[] 13:54:06

Milestone, one for the Ta. Grant is going to be demonstrating a grantee has procured resources.

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That account for at least 50% of the Grant budget.

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They need to achieve this milestone with 12 months of the Grant award, and once they have demonstrated that they've achieved this milestone, they were, they will receive payment one directly accounting for 50% of their milestone.

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2 is that the grantee has to achieve one of the 4 potential outcomes of a ta.

[] 13:54:39

Grant so you'll recall the very top of the presentation today when I first introduced the Grant domain, I noted that in the Ta Grant domain a grantee has to achieve one of 4 outcomes by the end of their grant period in order to receive the full funding for that grant here in

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milestone 2. They will need to attest to having achieved at least one of the 4 required grant outcomes of a ta.

[] 13:55:06

Grant, in order to receive the full funding for the grants that they've been awarded.

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They will have, as with the Qa. So onboarding domain they will have up to 24 months.

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From the moment of Grant award to achieve the second milestone, and once they achieved the second milestone, Pcg.

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Will release milestone to fund base.

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And so I will close with next step, so I will just remind folks before I share what's on the slide here that we are going to be posting a detailed Grant guidance document on the Cdi website this week that provides really the next several levels of detail down on all of the elements

[] 13:55:47

I just shared today for organizations who are interested in applying for a Qaio onboarding grant.

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They can connect with K-he as early as today.

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To begin that process and the information for reaching out to Cha high is listed here for organizations who are interested in applying for a Ta. Grant.

[] 13:56:06

We encourage you to review the guidance documents that will be posted, and to sign up for the Cdi mailing list to look out for the announcement of when the portal will be opened, and with that I'll hand it back to DM to wrap us up today.

[DeeAnne McCallin] 13:56:20

Thanks. Juliet. We've mentioned this onboarding. Got this?

[DeeAnne McCallin] 13:56:25

Grants guidance. Document a few times. Note that it's not the application, so some folks might get that and be diving right in thinking that it's their Vic to apply. But it is not that.

[DeeAnne McCallin] 13:56:38

But it's a very good resource, it's probably about 40 pages long, which is pretty long, for any of our collateral on the data exchange framework.

[DeeAnne McCallin] 13:56:47

But it's worth your read, so we only have a couple minutes left.

[DeeAnne McCallin] 13:56:50

I'm gonna before seeing if we have a minute for a couple of the stay involved questions that you asked today, and that many have been answering already along the way during the hour we'll use those to help shape this may sixteenth.

[DeeAnne McCallin] 13:57:06

A few people submitted questions when they registered for today's webinar.

[DeeAnne McCallin] 13:57:09

We'll use those questions as well to help shape the May sixteenth, and as Julia had to go pretty quick today, she covered a lot and we're gonna go deeper dive and have the.

[DeeAnne McCallin] 13:57:23

Entities that are running the programs K. High and Pcg present and share what the application portal looks like and things like that.

[DeeAnne McCallin] 13:57:33

On May sixteenth, Monday we have our lac meeting.

[DeeAnne McCallin] 13:57:36

We've mentioned our email a few times. Here's another great study.

[DeeAnne McCallin] 13:57:39

So it's the beginning top of the hour. I near the top of the hour.

[DeeAnne McCallin] 13:57:43

I covered a scenario of data exchange where the advisory group identified gaps here's another great resource to that I recommend.

[DeeAnne McCallin] 13:57:52

Folks read, and we have other resources on our web page so wanted to cover those before folks drop off at the top of the hour, and one or a couple of minutes for some questions.

[DeeAnne McCallin] 13:58:06

One question, and I'm just kinda quickly looking at the questions, do we know what estimate?

[DeeAnne McCallin] 13:58:11

What percent of the of the up to 47 million dollars will be spending around one round to round 3.

[DeeAnne McCallin] 13:58:18

We do not know, because we also don't know if the Kai inbox is being flooded right now, or if it's gonna be a little slower and round 2 is gonna be heavier, so we'll be watching it.

[DeeAnne McCallin] 13:58:31

We're we're insuring 3 rounds, so we do not know a percent as Juliet mentioned the qualified health information organizations are not identified.

[DeeAnne McCallin] 13:58:44

Yet these programs are standing up simultaneously because we did not want to delay one to have the other already identified.

[DeeAnne McCallin] 13:58:53

And there's mechanisms in the flow of awards, and the milestone timing and paying that if you apply for q it for hio, a.

[DeeAnne McCallin] 13:59:06

And for some reason they do not apply to become a queue.

[DeeAnne McCallin] 13:59:10

But in your way, awarded a grant, you will have the opportunity to change it to Hio B.

[DeeAnne McCallin] 13:59:17

Who was, did apply, and was awarded a as a named, a qualified, or you can change to the technical assistance.

[DeeAnne McCallin] 13:59:24

So we have factored that into. But we're standing these programs up at the same time.

[DeeAnne McCallin] 13:59:31

Currently only the 8 education grantees that we have mentioned have been awarded grants.

[DeeAnne McCallin] 13:59:38

So everything else. The application windows are not even open yet you do have to sign whether you're a mandated signatory or a voluntary signatory.

[DeeAnne McCallin] 13:59:52

You do need to have signed a Dsa.

[DeeAnne McCallin] 13:59:54

Prior to submitting your application. That will be that's one of that's one of the easier things for us to check on the front end to see whether you're eligible. So with that, I'll wrap this up for the day.

[DeeAnne McCallin] 14:00:07

Thank you, everyone for joining us. We'll take your questions here to help shape.

[DeeAnne McCallin] 14:00:13

May sixteenth, and fifth, to be submitting questions to us that can also help shape that those 2 h that we could probably start those 2 h tomorrow and fill the time.

[DeeAnne McCallin] 14:00:24

Thank you, Juliet. Thank you. Lisa, for joining us, and for that for Manette, for running the show today, and we look forward to seeing you all again sometime soon.