



DxF Participant Directory

How To Guide

January 2024

Please note that, as stated in the Participant Directory Policy and Procedure, Participants are solely responsible for ensuring the accuracy of their exchange choices selected in the Participant Directory. Choices may not be verified by CDII nor the Intermediaries that may be chosen within the directory by Participants.

1. Background

1.1. What is the Participant Directory?

The Participant Directory is both an application and a listing. The Participant Directory listing is a listing of organizations' choices of Intermediaries and/or technologies to exchange Health and Social Services Information (HSSI) under California's Health and Human Services (CalHHS) Data Exchange Framework (DxF). The listing will be published by CDII as both a machine readable (flat file) and a human readable (Microsoft Excel) file, available for download from the Center for Data Insights and Innovation's (CDII) [Data Exchange Framework web page](#). This "How To Guide" focuses on the Participant Directory application.

1.2. What does my organization need to do to be included in the Participant Directory listing?

Data Sharing Agreement (DSA) Signatories must log in to the CalHHS [Data Sharing Agreement Signing Portal](#) (referred to herein as the DSA Signing Portal) to complete, or update, their Participant Directory choices and those of any subordinate organizations.

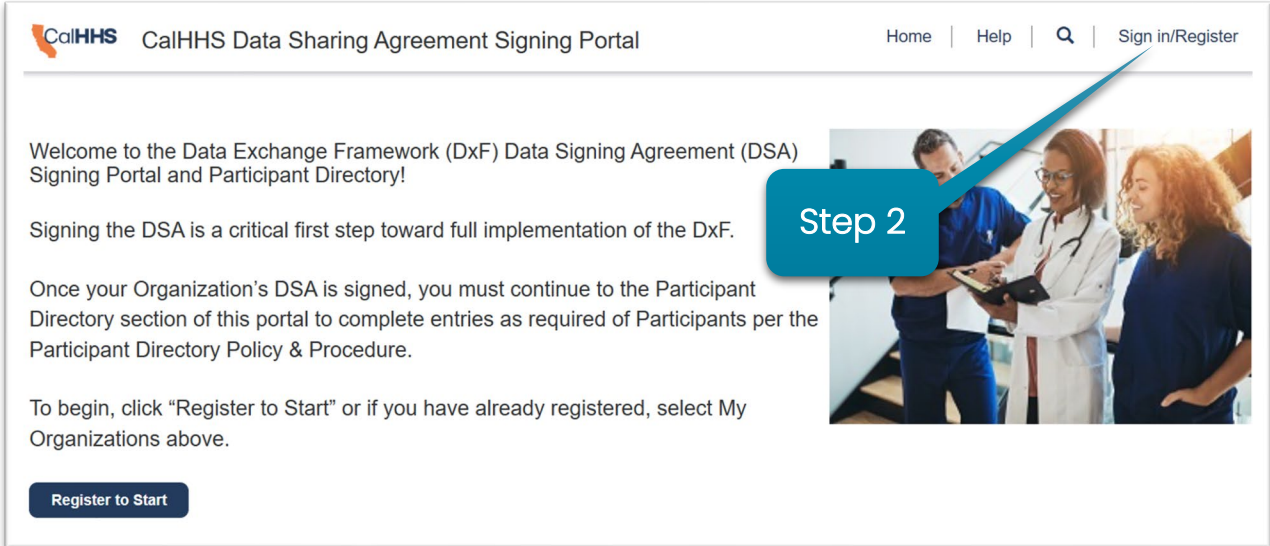
2. Instructions

2.1. How to find the Participant Directory and where to go to enter your choices for how to exchange.

Step 1: Go to the DSA Signing Portal at <https://signdxf.powerappsportals.com>

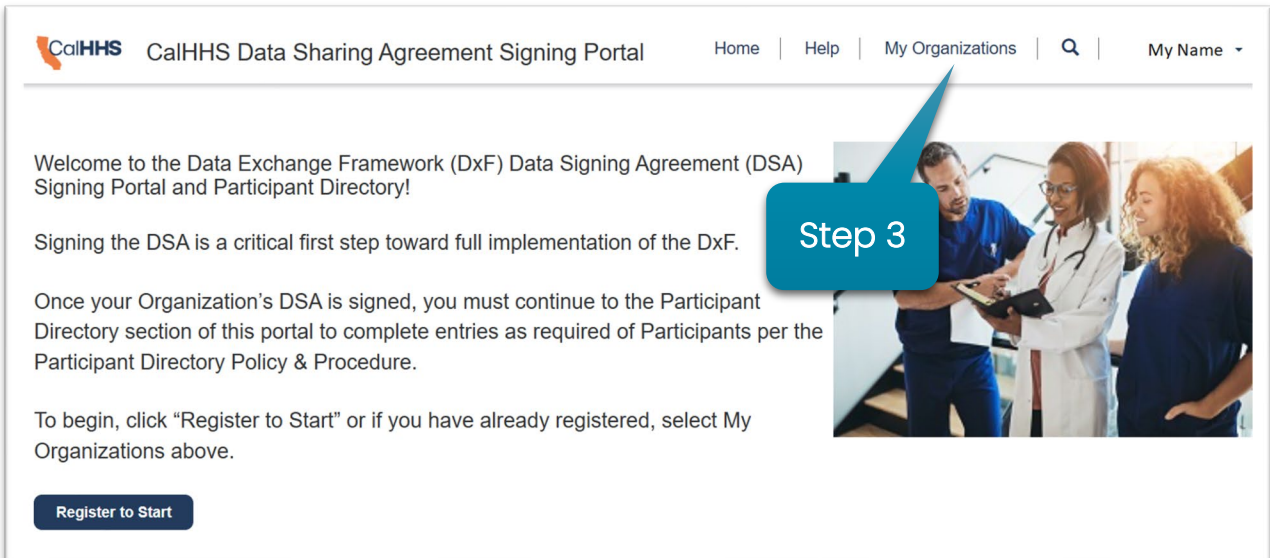
Step 2: Sign-in to your organization's DSA signing portal account.

NOTE: If your organization has not signed the DSA, you may not yet have an account to log in to. Please select "Sign in/Register" to create your account today.



The screenshot shows the CalHHS Data Sharing Agreement Signing Portal. The header includes the CalHHS logo, the page title "CalHHS Data Sharing Agreement Signing Portal", and navigation links for "Home", "Help", a search icon, and "Sign in/Register". The main content area contains a welcome message, instructions on signing the DSA, and a "Register to Start" button. A blue callout box labeled "Step 2" points to the "Sign in/Register" link in the header.

Step 3: Click on "My Organizations".



The screenshot shows the CalHHS Data Sharing Agreement Signing Portal after logging in. The header now includes "My Organizations" and "My Name" in the navigation menu. The main content area is identical to the previous screenshot, but a blue callout box labeled "Step 3" points to the "My Organizations" link in the header.

Step 4: You have navigated to the Data Sharing Agreement page.

Confirm that the "Account Status" for your Primary Organization is "DSA Document Signed".

NOTE: You will only be able to navigate to the Participant Directory forms if your "Account Status" reflects that your DSA is signed. If your "Account Status" says "Created", click on your Primary Organization name to get started with the steps to sign your DSA. See the "Help" page of the portal for additional guidance on signing your DSA.

Please email dxp@chhs.ca.gov if you believe the status reflected in your Primary Organization's "Account Status" is inaccurate.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | Help | My Organizations | Q | My Name

Data Sharing Agreement


To enter or update DSA signing details, click on the name of your primary organization below. To launch the Participant Directory entry form, click on the Participant Directory button.

If a Participant Directory button does not appear, check the Account Status of your Primary Organization to ensure the status is "DSA Document Signed". You must have signed the DSA to enter choices in the Participant Directory.

For information on the CalHHS Center for Data Insights and Innovation (CDII) Data Exchange Framework (DxF), visit the [CDII DxF Website](#).

Participant Directory

Primary Participant Seal




[Download Participant Seal](#)

[Participant Seal Usage Instructions](#)

Primary Organization

Organization Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
MyOrgName	Acute Care Settings	DSA Document Signed	Self	MyEmail@Email.com

Step 5: After confirming that your “Account Status” reflects “DSA Document Signed”, click on the “Participant Directory” button to fill out your Participant Directory choices.

 CalHHS Data Sharing Agreement Signing Portal
Home | Help | My Organizations | | My Name ·

Data Sharing Agreement

To enter or update DSA signing details, click on the name of your primary organization below. To launch the Participant Directory entry form, click on the Participant Directory button.


If a Participant Directory button does not appear, check the Account Status of your Primary Organization to ensure the status is “DSA Document Signed”. You must have signed the DSA to enter choices in the Participant Directory.

For information on the CalHHS Center for Data Insights and Innovation (CDII) Data Exchange Framework (DxF), visit the [CDII DxF Website](#).

Participant Directory

Step 5

Primary Participant Seal



[Download Participant Seal](#)
[Participant Seal Usage Instructions](#)

Primary Organization

Organization Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
MyOrgName	Acute Care Settings	DSA Document Signed	Self	MyEmail@Email.com

2.2. Completing Participant Directory choices for the Primary Organization

Step 6: You have navigated to the Participant Directory summary page.

The “Primary Organization” section lists your Primary Organizations in a table. The “Subordinate Organization” section lists Subordinate Organizations in a table, if applicable.

NOTE: Subordinate Organizations included in your signed DSA will populate the table in the “Subordinate Organizations” section. Subordinate Organizations added while in the Participant Directory pages will not be added to your signed DSA nor the DSA Signing Portal.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | Help | My Organizations | Search | My Name ▾

Data Sharing Agreement


To enter or update DSA signing details, click on the name of your primary organization below. To launch the Participant Directory entry form, click on the Participant Directory button.

If a Participant Directory button does not appear, check the Account Status of your Primary Organization to ensure the status is “DSA Document Signed”. You must have signed the DSA to enter choices in the Participant Directory.

For information on the CalHHS Center for Data Insights and Innovation (CDII) Data Exchange Framework (DxF), visit the [CDII DxF Website](#).

Participant Directory

Primary Participant Seal



[Download Participant Seal](#)
[Participant Seal Usage Instructions](#)

Primary Organization

Organization Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
MyOrgName	Acute Care Settings	DSA Document Signed	Self	gwe@freedassociates.com

Subordinate Organizations

If your organization has more than one subordinate organization or facility to which the DSA should apply, click Add Subordinate Organization. For example, a health system might have multiple acute care hospitals and medical groups. Please list all subordinate organizations or facilities here so they may be covered under a single signed DSA.

Add Subordinate Organization

Organization Name ↑	Account Type
MySubordinateHospital	Acute Care Settings
MySubordinatePlan	Plans

Step 7: Click on your Primary Organization's name to complete the Participant Directory information for the Primary Organization.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | Help | My Organizations | Q | My Name ▾

Participant Directory

The Participant Directory provides a way for you to communicate your choices for how you will provide Access to or Exchange of Health and Social Services information (HSSI) under the Data Exchange Framework (DXF). The tables below summarize the choices you have made to date. Click on the name of your primary organization or subordinate organization to select or update the choices of exchange as required in the Participant Directory Policy and Procedure (P&P).

[Back to My Organizations](#)

Primary Organization

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MyOrgName				

Step 8: Skip past the “Copy the choices for this Primary Organization to all Subordinate Organizations” checkbox until Step 10 below.

For the Primary Organization, begin with the checkbox field labelled “I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026”:

- Do not select the “exercise my option to delay” checkbox if the Primary Organization will start exchanging January 31, 2024, and proceed to Step 9,
- Select the “exercise my option to delay” checkbox to delay exchange until January 31, 2026, as outlined in the [Participant Directory P&P](#) section II.1.b.i, if your Primary Organization will begin exchange in 2026, then click “Save & Close” at the bottom of the page.

NOTE: Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the [Requirement to Exchange Health and Social Services Information P&P](#) should check the “exercise my option to delay” checkbox. Organizations that exercise the option to delay exchange of HSSI may also delay completing their Participant Directory exchange choices in Step 9 until January 31, 2026.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | Help | My Organizations | 🔍 | My Name ▾

Participant Directory

Primary Organization Choices

Use this form to add or update the choices for the Primary Organization that signed the DSA, including whether the Participant chooses to exercise its option to delay Exchange of health and social services information (HSSI) under the DxF until January 31, 2026, and the Intermediaries or technologies the Participant chooses to use for each Exchange type as required under the Technical Requirements for Exchange P&P.

[Back to Participant Directory Summary Page](#)

Primary Organization Name

MyOrgName

Participant Choices (and other required information)

Copy the choices for this Primary Organization to all Subordinate Organizations

I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI have also delayed choosing the following options until January 31, 2026.

Step 9: If your Primary Organization will start exchanging January 31, 2024 (checkbox in Step 8 not selected), there are additional exchange choices to complete (see screenshot at the bottom of Step 9 showing the three choices to be completed). For each of the three types of exchange, one choice must be selected.

NOTE: If a Primary Organization will not be exchanging HSSI under the DxF, but its Subordinate Organizations will be exchanging, select “NOT APPLICABLE” for each exchange type choice at the Primary Organization level. You will then make choices at the Subordinate Organization level (Steps 11-12).

“Choice for exchange entity to use to request HSSI from me” exchange choice:

- In this field, click on the dropdown to select the method by which your Primary Organization chooses to receive requests for HSSI from other Participants.
- The dropdown selections include, or may include:
 - Nationwide networks and frameworks,
 - DxF Qualified Health Information Organizations (“Qualified HIOs” or QHIOs),
 - Intermediaries that are also Participants (have signed the DSA),
 - Intermediaries that are not Participants (have not signed the DSA) that have been vetted by CDII,
 - “SELF” indicates that your organization uses point-to-point interface(s) to your own technology (see more information about “SELF” below),
 - “OTHER” indicates that your organization exchanges via an Intermediary not listed in the dropdown (see more information about “OTHER” below),
 - “NOT APPLICABLE” indicates that the Participant does not maintain any Health and Social Services Information (HSSI).

“Choice for exchange entity to use to send me HSSI” exchange choice:

- In this field, click on the dropdown to select the method by which your Primary Organization chooses to receive HSSI from other Participants.
- The dropdown selections have the same meaning as those outlined above for the “Choice for exchange entity to use to request HSSI from me” field, with the following exception:
 - “NOT APPLICABLE” indicates that the Participant elects not to participate in this optional exchange type.

“Choice for exchange entity to use to request notifications of ADT events from me” exchange choice:

- In this field, click on the dropdown to select the method by which your Primary Organization chooses to receive requests for ADT event notification from other Participants.

- The dropdown selections have the same meaning as those outlined above for the “Choice for exchange entity to use to request HSSI from me” field, with the following exception:
 - “NOT APPLICABLE” indicates that the Participant is not a Hospital or Emergency Department, or is a Skilled Nursing Facility (SNF) that elects not to participate in this exchange type (optional for SNFs).

NOTE: Intermediaries that provide a service to another Participant to facilitate DxF exchange must enter a choice other than “NOT APPLICABLE” for that exchange type.

Participant Choices (and other required information)

Copy the choices for this Primary Organization to all Subordinate Organizations


I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI have also delayed choosing the following options until January 31, 2026.

Choice for exchange entity to use to request HSSI from me

Choice for exchange entity to use to send me HSSI

Choice for exchange entity to use to request notifications of ADT events from me



Step 9.1: If you have selected “SELF” for *any* of the three types of exchange, you must provide a “URL providing a description of how to contact you to establish the point-to-point interface” and / or “Business Email Address” and “Business Phone Number” for the technical point of contact for establishing a point-to-point interface.

NOTE: You may list only one URL or one technical point of contact even if selecting “SELF” for more than one exchange type.

The image shows a screenshot of a web form with several input fields. A blue callout box labeled "Step 9.1" has three lines pointing to the following fields:

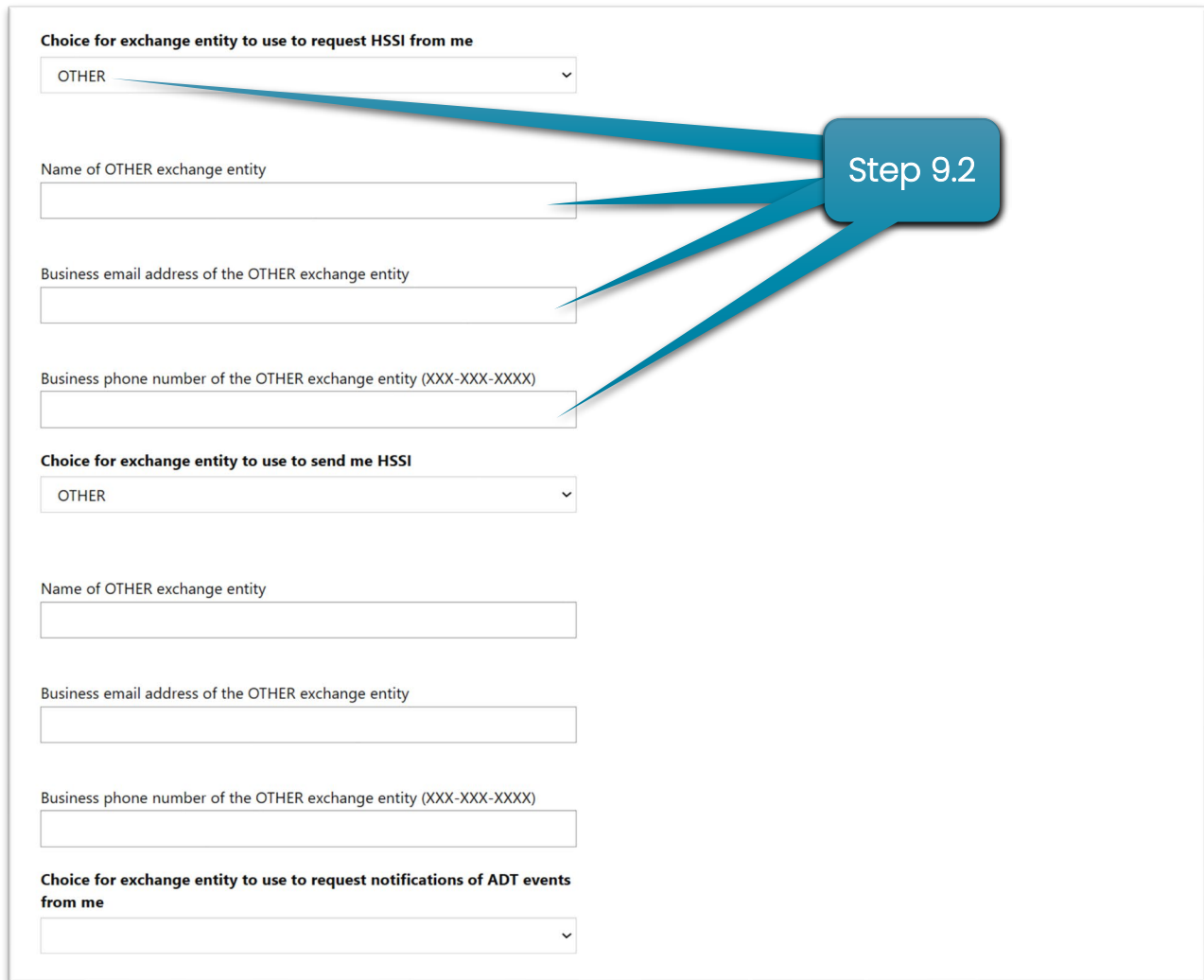
- The first dropdown menu, labeled "Choice for exchange entity to use to request HSSI from me", which has "SELF" selected.
- The second dropdown menu, labeled "Choice for exchange entity to use to send me HSSI", which also has "SELF" selected.
- The text input field labeled "URL providing a description of how to contact you to establish the point-to-point interface".

Other fields in the form include:

- A third dropdown menu labeled "Choice for exchange entity to use to request notifications of ADT events from me", which is currently empty.
- A text input field labeled "Business email address for a technical point of contact for establishing a point-to-point interface".
- A text input field labeled "Business phone number for a technical point of contact for establishing a point-to-point interface (XXX-XXX-XXXX)".

Step 9.2: If you have selected "OTHER" for any of the three types of exchange, the Intermediary exchange entity "Name", "Email" and "Phone Number" (XXX-XX-XXXX) are required for *each* selection of "OTHER".

Continue through Step 10 below to complete the choices for your Primary Organization.



The screenshot shows a web form with three sections, each starting with a dropdown menu set to "OTHER". A blue callout box labeled "Step 9.2" has arrows pointing to the "OTHER" dropdowns and the text input fields for "Name of OTHER exchange entity", "Business email address of the OTHER exchange entity", and "Business phone number of the OTHER exchange entity" in each section.

Choice for exchange entity to use to request HSSI from me
OTHER

Name of OTHER exchange entity

Business email address of the OTHER exchange entity

Business phone number of the OTHER exchange entity (XXX-XXX-XXXX)

Choice for exchange entity to use to send me HSSI
OTHER

Name of OTHER exchange entity

Business email address of the OTHER exchange entity

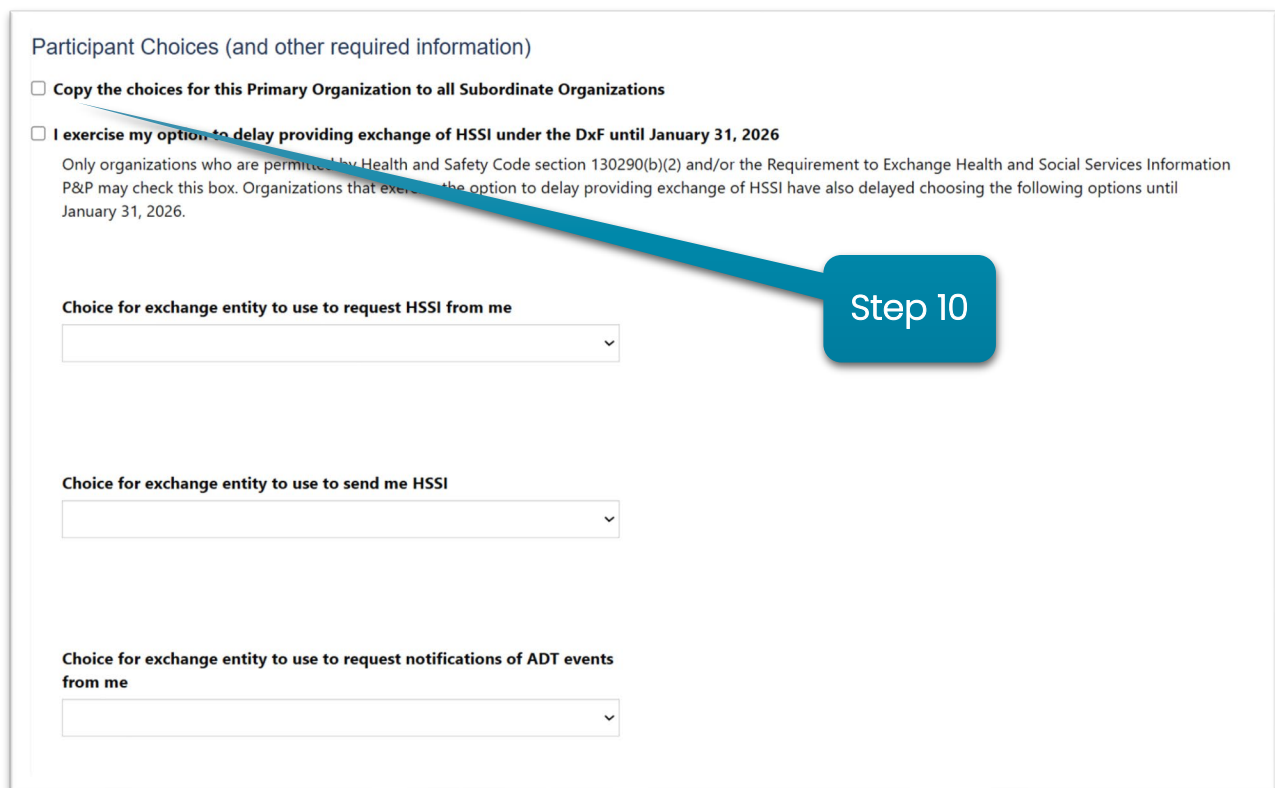
Business phone number of the OTHER exchange entity (XXX-XXX-XXXX)

Choice for exchange entity to use to request notifications of ADT events from me
OTHER

Step 10: If your Primary Organization has Subordinate Organizations listed in the signed DSA, the Participant Directory information will need to be completed for each Subordinate Organization.

“Copy the choices for this Primary Organization to all Subordinate Organizations” checkbox:

- Select the “Copy the choices” checkbox (see Step 10 screenshot below) if your Subordinate Organizations use the same methods for exchange as the Primary Organization. Checking this box and clicking “Save & Close” will copy the Primary Organization’s exchange choices to all Subordinate Organizations and complete the Participant Directory choices for your Primary Organization.
- Do not select the “Copy the choices” checkbox if your Subordinate Organizations do not all use the same methods for exchange as the Primary Organization. You may edit Participant Directory exchange choices for any Subordinate Organization by following Steps 11–12 below if the Subordinate Organization has exchange methods that differ from the Primary Organization. Click “Save & Close” to complete the Participant Directory choices for your Primary Organization.



Participant Choices (and other required information)

Copy the choices for this Primary Organization to all Subordinate Organizations

I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI have also delayed choosing the following options until January 31, 2026.

Choice for exchange entity to use to request HSSI from me

Choice for exchange entity to use to send me HSSI

Choice for exchange entity to use to request notifications of ADT events from me

2.3. Completing Participant Directory choices for Subordinate Organizations

Step II: Navigate to the Participant Directory main page by clicking the “Back to Participant Directory Summary Page” button if “Save & Close” did not bring you back to the Participant Directory main page.

In the “Subordinate Organizations” section, listed are Subordinate Organizations 1) included in your signed DSA and 2) that you may have added via the Participant Directory pages.

All Subordinate Organization that will be participating in exchange under the DxF must complete the Participant Directory choices for how to exchange.

Click on a Subordinate Organization’s name to complete the Participant Directory choices for how to exchange.

IMPORTANT ACTION: If there are Subordinate Organizations not listed in your signed DSA but that will participate in exchange of HSSI under the DxF, proceed to Steps 13-15 to add these Subordinate Organizations to the Participant Directory.

NOTE: Adding Subordinate Organizations to the Participant Directory will not revise nor amend your signed DSA. To add Subordinates to your signed DSA, navigate to the Data Sharing Agreement main page by selecting “My Organizations”, and in the “Subordinate Organizations” section, click the “Add Subordinate Organization” button. On the DSA Signing Portal “Help” page, see Steps 14 and 15 on editing or amending a signed DSA.

The screenshot shows the CalHHS Data Sharing Agreement Signing Portal. The page title is "Participant Directory". Below the title, there is a paragraph explaining the purpose of the directory. A "Back to My Organizations" button is visible. The page is divided into two main sections: "Primary Organization" and "Subordinate Organizations".

Primary Organization

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MyOrgName	No	OTHER	OTHER	

Subordinate Organizations

Add any additional subordinate organizations that are participating in Exchange of HSSI under the DxF as required in the Participant Directory P&P.

[Add Subordinate Organization to Participant Directory](#)

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MySubordinateHospital				
MySubordinatePlan				

Step 12: You have navigated to the “Participant Directory Subordinate Organization Choices” page where you will add details about how your Subordinate Organization will exchange as part of the DxF.

Complete the Participant Directory choices for all Subordinate Organizations by following Step 15.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | My Name ▾

Participant Directory

Subordinate Organization Choices

Use this form to add or update the choices for the Subordinate Organization that signed the DSA, including whether the Participant chooses to exercise its option to delay Exchange of health and social services information (HSSI) under the DxF until January 31, 2026, and the Intermediaries or technologies the Participant chooses to use for each Exchange type as required under the Technical Requirements for Exchange P&P.

[Back to Participant Directory Summary Page](#)

Step 12

Subordinate Organization Name

Name *

2.4. Adding Subordinate Organizations to the Participant Directory

Step 13: IMPORTANT ACTION: If you have identified a Subordinate Organization (or more than one) missing from the “Subordinate Organizations” list that will participate in the DxF, click the “Add Subordinate Organization to Participant Directory” button.

NOTE: Adding Subordinate Organizations to the Participant Directory will not revise nor amend your signed DSA.

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | Help | My Organizations | 🔍 | My Name ▾

Participant Directory

The Participant Directory provides a way for you to communicate your choices for how you will provide Access to or Exchange of Health and Social Services Information (HSSI) under the Data Exchange Framework (DxF). The tables below summarize the choices you have made to date. Click on the name of your primary organization or subordinate organization to select or update the choices of exchange as required in the Participant Directory Policy and Procedure (P&P).

[Back to My Organizations](#)

Primary Organization

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MyOrgName				

Subordinate Organizations

Add any additional subordinate organizations that are participating in Exchange of HSSI under the DxF as required in the Participant Directory P&P.

[Add Subordinate Organization to Participant Directory](#)

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MySubordinateHospital				
MySubordinatePlan				

Step 14: You have navigated to the “Participant Directory Subordinate Organization Choices” page where you will add details about how your additional Subordinate Organization will exchange as part of the DxF.

To add a Subordinate Organization to the Participant Directory, fill in the “Name” field in the “Subordinate Organization Name” section.

CalHHS | CalHHS Data Sharing Agreement Signing Portal | Home | Help | My Organizations | Search | My Name -

Participant Directory Subordinate Organization Choices

Use this form to add or update the choices for the Subordinate Organization that signed the DSA, including whether the Participant chooses to exercise its option to delay Exchange of health and social services information (HSSI) under the DxF until January 31, 2026, and the Intermediaries or technologies the Participant chooses to use for each Exchange type as required under the Technical Requirements for Exchange P&P.

[Back to Participant Directory Summary Page](#)

Step 14

Subordinate Organization Name

Name

MySubordinateHospital

Participant Choices (and other required information)

Copy the choices for this Subordinate Organization from those of its Primary Organization

I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI have also delayed choosing the following options until January 31, 2026.

Choice for exchange entity to use to request HSSI from me

OTHER

Step 15: In the “Copy the choices for this Subordinate Organization from those of its Primary Organization” checkbox:

- Select the “Copy the choices” checkbox if this Subordinate Organization uses the same methods for exchange as the Primary Organization. Checking this box and clicking “Save & Close” will copy the Primary Organization’s exchange choices to this Subordinate Organization and complete the Participant Directory choices for the Subordinate Organization.
- Do not select the “Copy the choices” checkbox if this Subordinate Organization does not use the same methods for exchange as the Primary Organization. Follow Step 9 to complete the “Participant Choices” section for the Subordinate Organization.

CalHHS | CalHHS Data Sharing Agreement Signing Portal | Home | Help | My Organizations | Search | My Name -

Participant Directory Subordinate Organization Choices

Use this form to add or update the choices for the Subordinate Organization that signed the DSA, including whether the Participant chooses to exercise its option to delay Exchange of health and social services information (HSSI) under the DxF until January 31, 2026, and the Intermediaries or technologies the Participant chooses to use for each Exchange type as required under the Technical Requirements for Exchange P&P.

[Back to Participant Directory Summary Page](#)

Subordinate Organization Name

Name

MySubordinateHospital

Participant Choices (and other required information)

Copy the choices for this Subordinate Organization from those of its Primary Organization

I exercise my option to delay providing exchange of HSSI under the DxF until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI have also delayed choosing the following options until January 31, 2026.



Choice for exchange entity to use to request HSSI from me

OTHER

Step 16: Review all choices saved as they appear in the tables on the Participant Directory summary page.


As needed, return to the Participant Directory and “How To Guide” in the future to make modifications to your choices. See the CDII DXF web page for weekly updates to the Participant Directory listing.

Should you have any questions, please email CDII at dxp@chhs.ca.gov

 CalHHS Data Sharing Agreement Signing Portal
Home | Help | My Organizations |  | My Name ▾

Participant Directory

The Participant Directory provides a way for you to communicate your choices for how you will provide Access to or Exchange of Health and Social Services Information (HSSI) under the Data Exchange Framework (DXF). The tables below summarize the choices you have made to date. Click on the name of your primary organization or subordinate organization to select or update the choices of exchange as required in the Participant Directory Policy and Procedure (P&P).



[Back to My Organizations](#)

Primary Organization

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MyOrgName	No	OTHER	OTHER	SELF

Subordinate Organizations

Add any additional subordinate organizations that are participating in Exchange of HSSI under the DXF as required in the Participant Directory P&P.

[Add Subordinate Organization to Participant Directory](#)

Organization Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
MySubordinateHospital	No	OTHER	OTHER	SELF
MySubordinatePlan	No	OTHER	OTHER	SELF