



Data Exchange Framework

Participant Directory Walkthrough

February 7, 2024

2:30 PM - 3:30 PM



Presenter Introductions

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Deputy Director,
Data Exchange Framework, CDII

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Independent HIE
Consultant, CDII

Agenda



- Participant Directory Overview
- Participant Directory Demo
- Wrap-up & Q&A

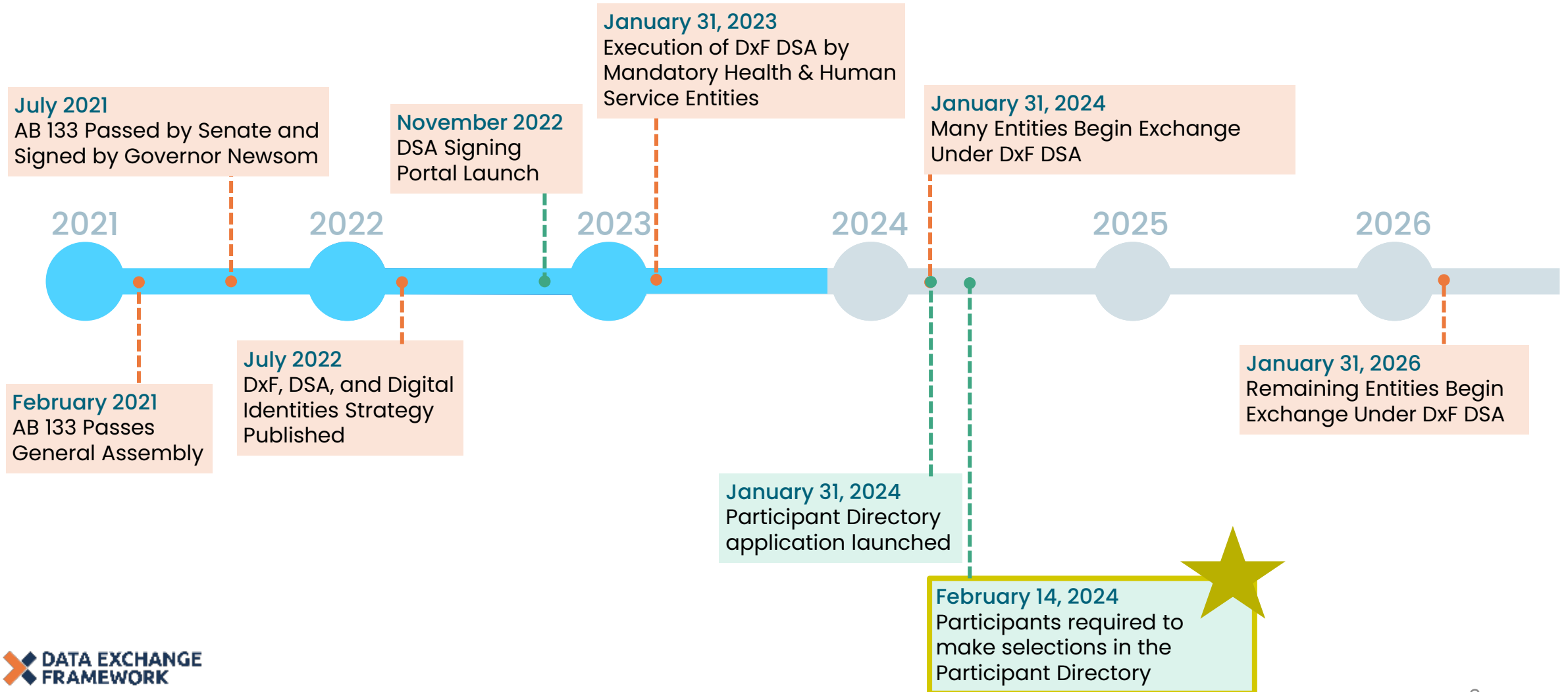
Q&A Procedure

- Please submit your questions through the Zoom Q&A function.
- At the designated time, participants may also use the Zoom 'raise hand' feature to be recognized and enabled to ask a verbal question. Individuals will be recognized in the order in which their hands were raised.
- CDII will select questions to be answered live during the webinar as time allows.
- If your question was not answered during the session and you would like to follow up with CDII, please submit your question to dxf@chhs.ca.gov

Participant Directory Overview

DxF Implementation Timeline

Past + Upcoming Milestones



About the Participant Directory



What is the Participant Directory?

- New fields in the DSA signing portal for Participants to choose the Intermediaries and technologies they will use to share HSSI
- New columns in the list of DSA signatories in which those choices are communicated to other Participants



Who enters choices into the Participant Directory?

All Participants. QHIOs and other Intermediaries may advise or assist Participants, but Participants are responsible for indicating and for the accuracy of their own choices. Participants beginning exchange in 2026 must enter their election to delay exchange, but do not need to enter choices until starting to exchange.



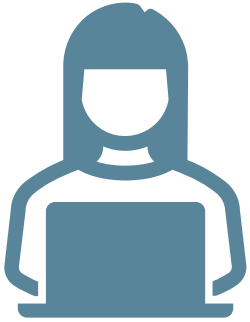
What choices needs to be entered?

- Starting to exchange in 2024 or 2026
- Choice for Request for Information
- Choice for Information Delivery (optional)
- Choice for Notifications for ADTs (hospitals, EDs, SNF optional)

Participants must make selections in the Participant Directory not more than **ten (10) business days** after Access to or Exchange of Health and Social Services Information under the Data Exchange Framework has been made available to other Participants.

Participant Directory (1/4)

Who must indicate their choices in the Participant Directory?



The Participant Directory P&P requires Participants to make choices for each Exchange type. The Technical Requirements for Exchange P&P establishes the types of Exchange required of each Participant.

- Every Participant must indicate an exchange choice for Request for Information, or “NOT APPLICABLE” if the Participant Maintains no HSSI.
- Participants that wish to receive HSSI (optional for all Participants) indicate that desire by indicating an Exchange choice for Information Delivery, or “NOT APPLICABLE” if they choose not to participate.
- Participants that are Hospitals or Emergency Departments must indicate an exchange choice for requests for Notification of ADT Events; others may choose “NOT APPLICABLE”.
 - Participants that are SNFs may also indicate a choice for Notifications.
- Participants that are Intermediaries must indicate:
 - A choice for Information Delivery if any Participant they serve elects to receive HSSI
 - A choice for Notification of ADT Events if any Participant they serve is required to or elects to provide Notifications of ADT Events

Participant Directory (2/4)

What choices can Participants make in how they will exchange HSSI?



A Participant listed in HSC § 130290(b)(2) or Requirement to Exchange HSSI P&P may elect to delay providing Access to or Exchange of HSSI until January 31, 2026.

- These Participants may delay entering their choices for Exchange of HSSI under DxF until January 31, 2026, after choosing the option to delay in the Participant Directory.

A Participant may choose to provide Access to or Exchange of HSSI via:

- A Nationwide Network or Framework
- A Participant that is an Intermediary, such as a QHIO
- An Intermediary that is not a Participant
- “SELF” if they choose to use Point-to-Point Interfaces to their own technology
- “OTHER” if they are using an Intermediary not yet listed as an Exchange choice in the Participant Directory application
- “NOT APPLICABLE” if the Exchange type is optional for their organization type or the organization Maintains no HSSI

Participant Directory (3/4)

Other requirements of Participants



A Participant that is a signatory to the DSA must enter and maintain within the Participant Directory the names and choices of all subordinate organizations.

A Participant that chooses to use Point-to-Point Interfaces to its own technology by choosing “SELF” must also enter:

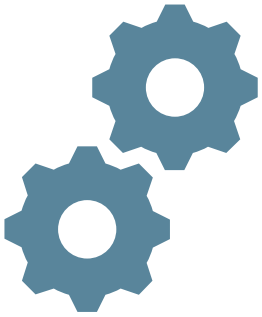
- A URL to a public web page at which to find more information on how to establish the connection; and/or
- An email address and phone number of the technical contact that maintains point-to-point interfaces to the Participant’s technology

A Participant that chooses “OTHER” must provide the name of the Intermediary and contact information to allow CDII to determine whether the Intermediary can be included in Participant Directory choice(s) for the Exchange type(s).

- It remains the responsibility of the Participant to ensure it uses Intermediary services in compliance with the DSA and its Policies and Procedures.

Participant Directory (4/4)

How does the Participant Directory help enable Exchange?



Background:

- Technical connection details (endpoint URLs, certificates, etc.) often found in a network's directory may present a security risk if made publicly available.
- Intermediaries (nationwide networks, QHIOs, etc.) manage their own directories that include connection details.

How the DxF Participant Directory listing can be used by a Participant:

1. The Participant Directory listing points Participants to a particular Intermediary.
2. Participants then use the Intermediary's directory to gain the connection details necessary.

Advantages of this approach:

- Connection details remain secure.
- Connection details are maintained by the Intermediaries that are authoritative for and have control over verifying the connection information.

Participant Directory Walkthrough

Wrap-up & Q&A

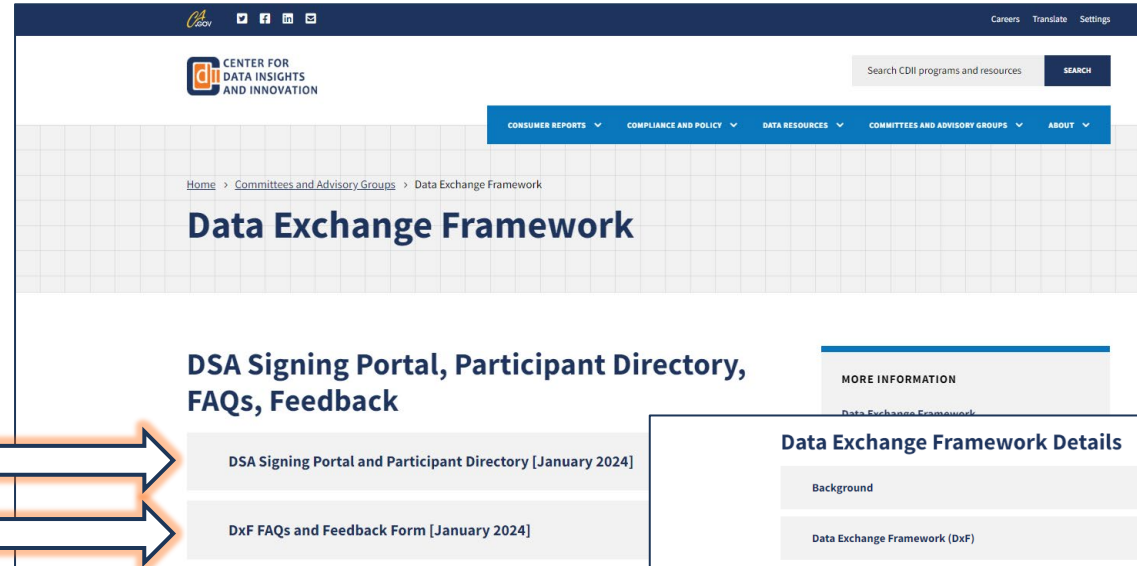
Question & Answer



CDII DxF Webpage Resources

For more information on the DxF, please visit our [CDII DxF Webpage](#).

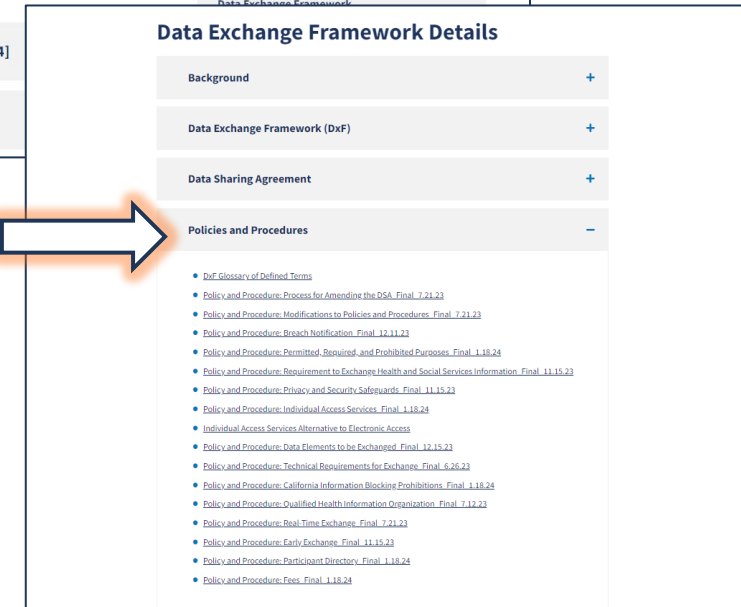
There you can find:



[Participant Directory Log-in Page](#)

[Frequently Asked Questions](#)

[DxF Policies and Procedures](#)



Screen Captures from Today's Demonstration

Participant Directory Section of the DxF Web Page

CA.GOV [Twitter] [Facebook] [LinkedIn] [Email] Careers Translate Settings

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Data Exchange Framework

DSA Signing Portal and Participant Directory [January 2024]

DSA Signing Portal and Participant Directory +

The Data Exchange Framework

Background +

Implementation Advisory Committee

MORE INFORMATION

[Data Exchange Framework](#)

[Committee for the Protection of Human Subjects](#)

click

Center for Data Insights and Innovation

1215 O Street

Sacramento, CA 95814

• Email: cdii@chhs.ca.gov

Link to the Participant Directory Application

DSA Signing Portal and Participant Directory [January 2024]

DSA Signing Portal and Participant Directory

CDII has made enhancements to the Data Sharing Agreement (DSA) Signing Portal, which includes the Participant Directory web-based application. If you have not yet signed the DSA, do so today.

DSA Signing Portal

- Sign into the [CalHHS Data Sharing Agreement Signing Portal](#) ↗
- [DxF Single Data Sharing Agreement pdf template](#)
- [Data Sharing Agreement Signatory List](#) ↗

Participant Directory

All Participants are obligated by the Participant Directory Policy and Procedure to enter the Intermediaries or technologies they choose to exchange health and social services information under the DxF. For more information on both the DSA Signing Portal and the Participant Directory web-based application, see resources below.

- [Participant Directory How To Guide](#)
- Sign into the [DSA Signing Portal](#) ↗ to access the participant directory.
- Participant Directory Listing in Microsoft Excel format – under development, coming soon.
- Participant Directory Listing in machine readable format – under development, coming soon.
- Find the Participant Directory P&P in the “Policies and Procedures” section of this web page.



MORE INFORMATION

Data Exchange Framework

[Committee for the Protection of Human Subjects \(CPHS\)](#)

Center for Data Insights and Innovation

1215 O Street


Sacramento, CA 95814

• Email: cdii@chhs.ca.gov

Landing Page for the DSA Signing Portal (1)



 CalHHS Data Sharing Agreement Signing Portal

Home | Help |  | Sign in/Register

Welcome to the Data Exchange Framework (DxF) Data Signing Agreement (DSA) Signing Portal and Participant Directory!

Signing the DSA is a critical first step toward full implementation of the DxF.

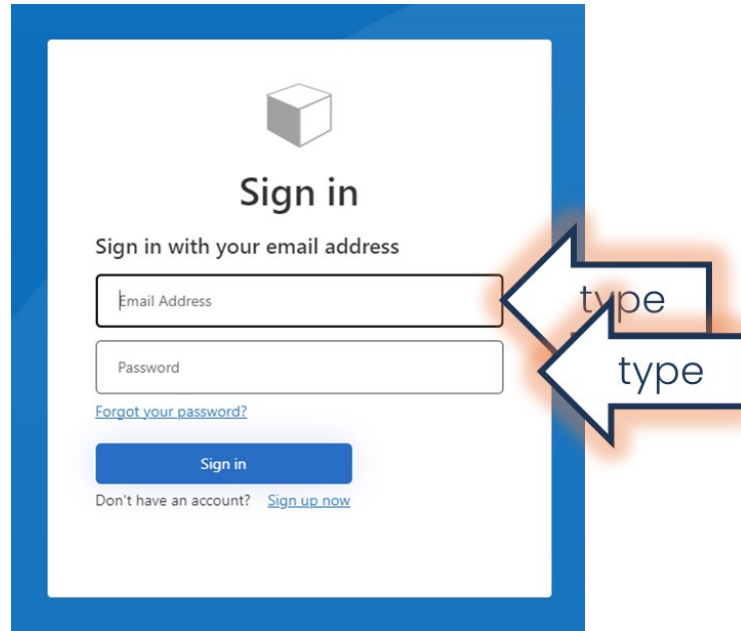
Once your Organization's DSA is signed, you must continue to the Participant Directory section of this portal to complete entries as required of Participants per the Participant Directory Policy & Procedure.

To begin, click "Register to Start" or if you have already registered, select My Organizations above.

[Register to Start](#)

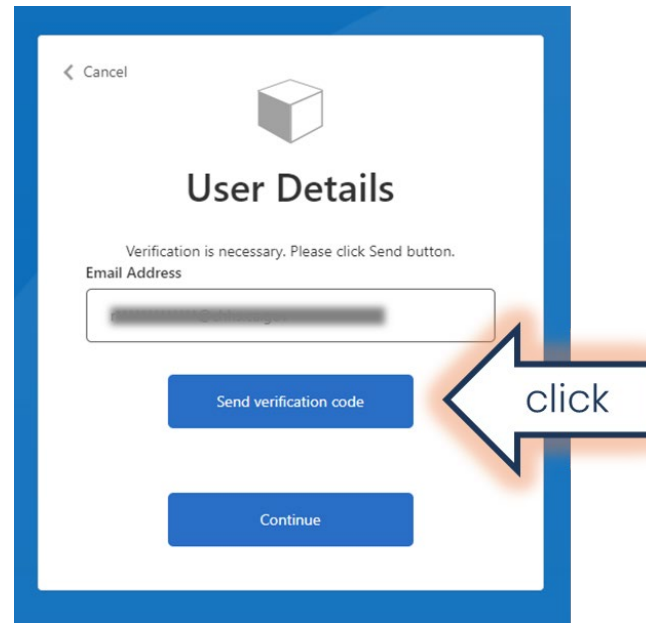


Login Dialog for the DSA Signing Portal



The image shows a 'Sign in' dialog box with a blue border. At the top center is a 3D cube icon. Below it is the text 'Sign in'. Underneath is the instruction 'Sign in with your email address'. There are two input fields: the first is labeled 'Email Address' and the second is labeled 'Password'. Below the password field is a blue link that says 'Forgot your password?'. At the bottom of the dialog is a blue button labeled 'Sign in'. Below the button is the text 'Don't have an account?' followed by a blue link 'Sign up now'. To the right of the dialog, two white arrows with black outlines point towards the 'Email Address' and 'Password' fields. Each arrow has the word 'type' written inside it, indicating that these fields are of type 'text'.

Two-Factor Authentication – Step One



Verification Code for Two-Factor Authentication



Two-Factor Authentication – Step Two

< Cancel



User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

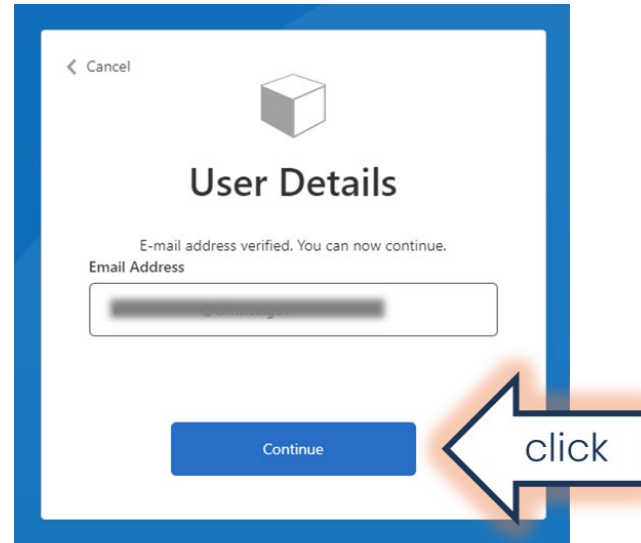
Email Address

Verification code

paste

click

Two-Factor Authentication – Step Three



Landing Page for the DSA Signing Portal (2)

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [Search Bar]

Welcome to the Data Exchange Framework (DxF) Data Signing Agreement (DSA) Signing Portal and Participant Directory!


Signing the DSA is a critical first step toward full implementation of the DxF.

Once your Organization's DSA is signed, you must continue to the Participant Directory section of this portal to complete entries as required of Participants per the Participant Directory Policy & Procedure.

To begin, click "Register to Start" or if you have already registered, select My Organizations above.

Click on My Organizations to Begin

My Organizations ← click



DSA Signing Portal – My Organizations

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 ← click

Primary Participant Seal



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

Primary Organization

Account Name ↑	Account Type	Account Status	Signed	Address
Demo Organization	Acute Care Settings	DSA Document Signed		hhs.ca.gov

← check

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](#)

Account Name ↑	Account Type
Demo Hospital 1	Acute Care Settings
Demo Hospital 2	Acute Care Settings
Demo Lab 1	Ancillary Care


Participant Directory Summary Page

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

Account Name 	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization				



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				
Account Name 	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1				
Demo Hospital 2				
Demo Lab 1				

Entering Choices for the Primary Organization

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

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

Demo 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

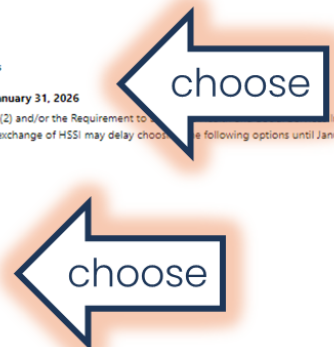
Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirement to Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI may delay choosing the following options until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

Choice for exchange entity to use to request HSSI from me

- eHealth Exchange
- Carequality
- CommonWell Health Alliance
- Cozeva
- Health Gorilla
- Los Angeles Network for Enhanced Services
- Long Health
- Manifest MedEx
- Orange County Partners in Health HIE
- SacValley MedShare
- San Diego Health Connect
- Serving Communities Health Information Organization
- SELF
- OTHER
- NOT APPLICABLE

You may choose "NOT APPLICABLE" if you do not maintain any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your choice to use point-to-point interfaces to your own technology, you must also enter a URL and/or a business email address and business phone number for a technical point of contact. If you choose "OTHER", you must also enter the name of the exchange entity, business email address, and business phone number so that CDII can contact them.

[Save & Close](#)



Saving Choices for the Primary Organization

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [Search]

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 DxP 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

Demo 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 DxP 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 may delay choosing the following options until January 31, 2026.

Choice for exchange entity to use to request HSSI from me

eHealth Exchange

Choice for exchange entity to use to send me HSSI


eHealth Exchange

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

NOT APPLICABLE

Use "NOT APPLICABLE" if you do not maintain any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your point-to-point interfaces to your own technology, you must also enter a URL and/or a business email address and business phone number for a contact. If you choose "OTHER", you must also enter the name of the exchange entity, business email address, and business phone number so contact them.

[Save & Close](#)



Summary Page with Primary Organization Choices

ColHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [REDACTED]

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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Making Changes for a Subordinate Organization (1)

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [Search Box]

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Hospital 2		eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1		eHealth Exchange	eHealth Exchange	NOT APPLICABLE

to
change
choices



Changing Choices for a Subordinate Organization

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 Dx/F 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 *

Demo Lab 1

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 Dx/F 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 may delay choosing the following options until January 31, 2026.

Choice for exchange entity to use to request HSSI from me

eHealth Exchange

Choice for exchange entity to use to send me HSSI



eHealth Exchange

- eHealth Exchange
- Carequality
- CommonWell Health Alliance
- DirectTrust
- Cozeva
- Health Gorilla
- Los Angeles Network for Enhanced Services
- Long Health
- Manifest MedEx
- Orange County Partners in Health HIE
- SacValley MedShare
- San Diego Health Connect
- Serving Communities Health Information Organization
- SELF
- OTHER

NOT APPLICABLE

Technical points of contact for the exchange type is optional for your organization. If you choose "SELF" indicating your organization, you must also enter the name of the exchange entity, business email address, and business phone number so that CDII can contact you.

Save & Close



Making Changes for a Subordinate Organization (2)

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [Redacted]

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1	No	eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE

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choices



Choosing "SELF"

Subordinate Organization Name

Name *

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 DxP 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 may delay 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

URL providing a description of how to contact you to establish the point-to-point interface

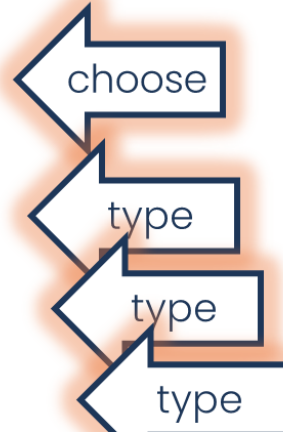
Business email address for a technical point of contact for establishing a point-to-point interface

Business phone number for a technical point of contact for establishing a point-to-point interface (XXX-XXX-XXXX)

You may choose "NOT APPLICABLE" if you do not have any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your choice to use point-to-point interfaces, you must also enter a URL and/or a business email address and business phone number for a technical point of contact. You must also enter the name of the exchange entity, business email address, and business phone number so that CDII can contact the exchange entity.

Save & Close

Required when choosing "SELF"



Making Changes for a Subordinate Organization (3)

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

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1		eHealth Exchange	eHealth Exchange	SELF
Demo Hospital 2		eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1		eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE

to
change
choices



Choosing "OTHER"

Required when choosing "OTHER"

Subordinate Organization Name

Name *

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 may delay 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

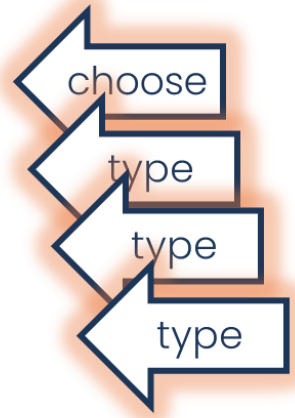
Choice for exchange entity to use to request notifications of ADT events from me

Name of OTHER exchange entity

Business email address of the OTHER exchange entity

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

You may choose "NOT APPLICABLE" if you do not have any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your choice to use point-to-point interface technology, you must also enter a URL and/or a business email address and business phone number for a technical point of contact. If you choose "OTHER" you must also enter the name of the exchange entity, business email address, and business phone number so that CDII can contact the exchange entity.



Adding a Subordinate Organization (1)

CalHHS CalHHS Data Sharing Agreement Signing Portal Home | My Organizations | Help | Q | [Redacted]

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	SELF
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	OTHER
Demo Lab 1	No	eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE

updated choices



Exercising Option to Delay Exchange until 2026

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 DxP 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 *

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 DxP until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirements for Exchange P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI may delay exchange of HSSI 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

You may choose "NOT APPLICABLE" if you do not have any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your choice to use point-to-point interfaces to exchange HSSI, you must also enter a URL and/or a business email address and business phone number for a technical point of contact. If you choose "OTHER" indicating you choose to use an intermediary, you must also enter the name of the exchange entity, business email address, and business phone number so that CDII can contact the intermediary.

[Save & Close](#)



Adding a Subordinate Organization (2)

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

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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	SELF
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1	No	eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE
Demo Psych Hospital 1	Yes			



Copying Choices from the Primary Organization

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 Dx/F 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 *

Demo SNF 1

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 Dx/F until January 31, 2026

Only organizations who are permitted by Health and Safety Code section 130290(b)(2) and/or the Requirements for Exchange Health and Social Services Information P&P may check this box. Organizations that exercise the option to delay providing exchange of HSSI may delay 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

You may choose "NOT APPLICABLE" if you do not have any HSSI or the exchange type is optional for your organization. If you choose "SELF" indicating your choice to use point-to-point interfaces for exchange, you must also enter a URL and/or a business email address and business phone number for a technical point of contact. If you choose "OTHER" to enter the name of the exchange entity, business email address, and business phone number so that CDII can contact the exchange entity.

type

click

click

Save & Close

Reviewing Choices

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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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	SELF
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1	No	eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE
Demo Psych Hospital 1	Yes			
Demo SNF 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE


check all choices

Leaving the Participant Directory Portion of the Portal

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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

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Organization	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

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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](#)

Account Name ↑	Delaying Exchange until 2026	Request for Information	Information Delivery	Requests for Notification of ADT Events
Demo Hospital 1	No	eHealth Exchange	eHealth Exchange	SELF
Demo Hospital 2	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE
Demo Lab 1	No	eHealth Exchange	NOT APPLICABLE	NOT APPLICABLE
Demo Psych Hospital 1	Yes			
Demo SNF 1	No	eHealth Exchange	eHealth Exchange	NOT APPLICABLE

DSA Signing Portal – My Organizations (Unchanged)

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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

Account Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
Demo Organization	Acute Care Settings	DSA Document Signed	Self	robert.colhren@chhs.ca.gov

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

Account Name ↑	Account Type
Demo Hospital 1	Acute Care Settings
Demo Hospital 2	Acute Care Settings
Demo Lab 1	Ancillary Care

subordinate orgs
on DSA
unchanged

Logging Out

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Data Sharing Agreement


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Participant Directory

Primary Participant Seal



[Download Participant Seal](#)

[Participant Seal Usage Instructions](#)

Primary Organization

Account Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
Demo Organization	Acute Care Settings	DSA Document Signed	Self	robert.colthren@chhs.ca.gov

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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

Account Name ↑	Account Type
Demo Hospital 1	Acute Care Settings
Demo Hospital 2	Acute Care Settings
Demo Lab 1	Ancillary Care

