



California Health & Human Services Agency Center for Data Insights and Innovation Data Exchange Framework (DxF) Participant Directory Webinar Transcript (2:30 PM – 3:30 PM PT, February 7, 2024)

The following text is a transcript of the February 7, 2024 Data Exchange Framework Participant Directory webinar. The transcript was produced using Zoom's transcription feature. It should be reviewed concurrently with the recording – which may be found on the <u>CalHHS Data Exchange Framework webpage</u> to ensure accuracy.

[Alice K - Events] 17:30:33

Hello and welcome. My name is Alice and I'll be in the background answering any Zoom technical questions.

[Alice K - Events] 17:30:39

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

[Alice K - Events] 17:30:49

At the designated time, meeting participants can also use the Zoom raise hand feature to be recognized and enabled to ask a verbal question.

[Alice K - Events] 17:30:57

Individuals will be recognized in the order in which their hands were raised. Dring today's event live close captioning will be available.

[Alice K - Events] 17:31:06

Please click on the CC button at the bottom of your Zoom window to enable or disable. With that, I'd like to introduce Dean McCarthy.

[DeeAnne McCallin] 17:31:15

Hi everybody. Thank you for joining us today. I'm DM and Kellen with CDI, the deputy director working on the data exchange framework.

[DeeAnne McCallin] 17:31:24





Pleased to welcome you to today's Data Exchange Framework, participant directory walkthrough.

[DeeAnne McCallin] 17:31:30

This webinar will be recorded and posted to the Cal HHS CDI DXF web page along with presentation slides following today's session that typically takes us about 5 business days or so to get that posted.

[DeeAnne McCallin] 17:31:45

You're gonna, if you're familiar with my, presentations, I, tend to talk a lot.

[DeeAnne McCallin] 17:31:53

Today I might be reading a lot because just like for you, this is pretty new. So I think there's actually going to be value in in kind of sticking to to some talking points.

[DeeAnne McCallin] 17:32:03

And joining me today is my colleague, IM Catherine. He'll be walking through an actual live demo.

[DeeAnne McCallin] 17:32:10

Of the participant directory screens that are incorporated into the DSA signing portal.

[DeeAnne McCallin] 17:32:16

Well, I'll try to reframe from some acronym speak, but if DXF stands for Data Exchange Framework and DSA is data sharing agreement.

[DeeAnne McCallin] 17:32:27

So we are here to talk about the participant directory.

[DeeAnne McCallin] 17:32:33

Covering an overview of the directory which actually involves on the broad scale a policy and procedure and then the application is where we'll be in and doing a demo.





[DeeAnne McCallin] 17:32:47

And then what the outcome of the application is a participant directory listing and we do hope to have time.

[DeeAnne McCallin] 17:32:56

In the second half near the end for questions and answers.

[DeeAnne McCallin] 17:33:01

For the Q&A procedure at any point during the webinar, please feel free to submit your questions through the Zoom Q&A function at the end of the presentation we'll be able to read through the questions that are submitted during the hour to be able to answer them live if time permits.

[DeeAnne McCallin] 17:33:19

At the designated time you can also you may be able to use the zoom raise hand feature to be able to be recognized and asked a question.

[DeeAnne McCallin] 17:33:29

Reminder to you that this is being recorded so that if you ask a question, your question verbally would be recorded as well.

[DeeAnne McCallin] 17:33:36

If your question is not answered during the session and you would like to follow up with us, please submit it to the dxf@chhs.ca.

[DeeAnne McCallin] 17:33:48

Email address. It's on the screen right now and one of my colleagues will also drop it into the.

[DeeAnne McCallin] 17:33:54

Chat. I think that's where we go for that type of thing today. So with no further to do.





[DeeAnne McCallin] 17:34:00

Going into the. Presentation here. So this slide illustrates milestones. That mark the significant points within the data exchange framework implementation timeline.

[DeeAnne McCallin] 17:34:14

Note that the slide highlights January 30 first, 2024 as it was the key date making it the date that many entities are required to begin.

[DeeAnne McCallin] 17:34:25

Exchange under the data exchange framework. It's also the day that we launched the participant directory.

[DeeAnne McCallin] 17:34:31

So that launch of the directory is with in the DSA signing portal and that's what you'll be learning about this hour.

[DeeAnne McCallin] 17:34:38

The. Participant directory PNP, which was first socialized with the IAC in early 23.

[DeeAnne McCallin] 17:34:48

And then with the DSA policy and procedure subcommittee throughout the latter part of 2023 establishes the obligations of participants and.

[DeeAnne McCallin] 17:35:01

23 establishes the obligations of participants and see and CDII for providing information into the participant directory.

[DeeAnne McCallin] 17:35:13

And that's as usual for our policies and procedures went through. The public comment and stakeholder collaboration information about all of that type of stuff.

[DeeAnne McCallin] 17:35:22





[DeeAnne McCallin] 17:35:26

About the participant directory. So what is it? The actual application or new fields in the signing portal for participants who choose the intermediaries and technologies that they will use to share health and social services information.

[DeeAnne McCallin] 17:35:43

Participants are capital P that means an organization that is signed the DSA and if you're not familiar with any of the terminology that we have.

[DeeAnne McCallin] 17:35:54

We do have a wonderful DXF glossary that's on our web page that someone can probably also drop into the chat for you.

[DeeAnne McCallin] 17:36:00

Words that you might not be accustomed to seeing capitalized there in the DXF, glossary.

[DeeAnne McCallin] 17:36:07

So who needs to enter the choices into the participant directory, all participants. QHI OS, which are qualified health information organizations and other intermediaries, may advise or assist participants.

[DeeAnne McCallin] 17:36:22

For indicating and for the accuracy of their own choices, but each participant needs to do their own data entry into the signing portal.

[DeeAnne McCallin] 17:36:32

You begin one of the choices in the portal is selecting if you have determined that you're eligible for and are opting, electing to delay exchange until 2026.

[DeeAnne McCallin] 17:36:47





So that's one of the first line entries that you'll see. And the choices are whether you're starting to exchange in 24 or 26 and if you are going with the 26 it's because you're checking the health and safety code 13029, to see if you fit into the and also the technical requirements PMP.

[DeeAnne McCallin] 17:37:06

If you're eligible for the 2026 choice. The real mean and potatoes comes with your choice for the request for information, your choice for information delivery and your choice for notifications for alert discharge and transfer, notification events or what we commonly refer to as ADTs.

[DeeAnne McCallin] 17:37:29

So for a couple entity types, hospitals and emergency departments, you're required to answer and enter those choices and skilled nursing facilities are optional but but encouraged.

[DeeAnne McCallin] 17:37:41

You must make these selections not more than 10 business days after access to or exchange of health and social services information under the framework has been made of available to other participants.

[DeeAnne McCallin] 17:37:53

And let's see, is there anything else?

[DeeAnne McCallin] 17:37:57

Once you if you select 2026 you do not need to enter any of the other choices. That are listed below that bullet item there.

[DeeAnne McCallin] 17:38:09

Some of this, of course, will seem very fast, so it's good to just kind of listen.

[DeeAnne McCallin] 17:38:14

Watch the demo if we need to go back to some of these earlier slides later. We certainly can. And of course, all to be posted on our web page as well.

[DeeAnne McCallin] 17:38:25





So to reiterate that every participant must indicate an exchange choice for request for information or select from a drop down arrow or pick list not applicable if the participant does not mean help HSSI.

[DeeAnne McCallin] 17:38:43

Participants that wish to receive HSSI. HSI as a reminder is health and social services information as defined in the data exchange framework is optional for all participants and that's where you indicate the desire by indicating an exchange choice for information delivery.

[DeeAnne McCallin] 17:39:02

Or not applicable if they choose not to participate. So the way you choose is via dropdown menu on each of these 3 choices.

[DeeAnne McCallin] 17:39:12

Participants that are hospitals. Or emergency departments must indicate an exchange choice for requests for notification of ADT events.

[DeeAnne McCallin] 17:39:22

Others may choose not applicable. When you see a slide or you hear myself a rim say you must choose this must choose shall do that that should comport and crosswalk to what's in our policies and procedures.

[DeeAnne McCallin] 17:39:35

The rules of the roads are established there and then we implement it and put it into an application like this presentations.

[DeeAnne McCallin] 17:39:43

Participants that are sniffs may also indicate a choice for notifications. Participants, that are intermediaries must indicate a choice for request for information just as every other participant.

[DeeAnne McCallin] 17:39:58

I actually just kind of checked myself here feeling like I'm going a little fast because some of us have been living in this for like 2 solid weeks and we're really in it.





[DeeAnne McCallin] 17:40:10

So I do apologize if I'm going too fast. I'll try to slow it down a little bit.

[DeeAnne McCallin] 17:40:14

Cadence, but also with eyes on trying to make sure we have time for Q&A later on.

[DeeAnne McCallin] 17:40:22

Choices for information delivery if a participant serve elects to receive HSSI. So if you want to be receiving HSSI then you need to be making that choice.

[DeeAnne McCallin] 17:40:33

And a choice for notification of ADT events if any participant they serve is required or elects to.

[DeeAnne McCallin] 17:40:42

So that would be like a intermediary or QHIO should be putting in a choice for ADTs.

[DeeAnne McCallin] 17:40:47

Because they serve one of the required entity types that has the hospitals or the the emergency departments.

[DeeAnne McCallin] 17:40:59

Alrighty, what choices can participants make in how they will exchange HSSI? A participant listed in health and safety code 130290.

[DeeAnne McCallin] 17:41:11

Section B 2 or the data exchange frameworks requirement to exchange HSSI policy and procedure. May elect to delay providing access to or exchange of HSSI until January 31 2026.

[DeeAnne McCallin] 17:41:28

These participants may delay entering their choices for the exchange under after they have chosen that box on the application that says I am electing to delay until 2,026.





[DeeAnne McCallin] 17:41:40

You're not required to delay until 2,026 but if you fully intend and and you're eligible to delay and you want to not exchange until then you should be going into the participant directory and checking the box that you'll see in a little while.

[DeeAnne McCallin] 17:41:57

A participant may choose to provide access to or exchange. Hssi via a nationwide network.

[DeeAnne McCallin] 17:42:08

These are the choices that you'll see in the directory listings. They're pick lists.

[DeeAnne McCallin] 17:42:15

You'll see a Nation 9 that nationwide networks or frameworks. You may see a participant that is an intermediary such as a qualified HIO.

[DeeAnne McCallin] 17:42:22

You may see an intermediary that is not a participant. Self in capital letters is one of your options if you choose to use point-to-point interfaces to their own technology.

[DeeAnne McCallin] 17:42:34

Other if you are using an intermediary that's not yet listed as an exchange choice and not applicable if the exchange type is optional for their organization type or the organization maintains no HSSI.

[DeeAnne McCallin] 17:42:50

We do have and I can't remember if it's mentioned anywhere here in this deck. We do have a participant.

[DeeAnne McCallin] 17:42:58

Directory application how to guide that's posted on our web page. So if some of this information and you're ready and ripe right after this webinar and you don't have access to the slide deck.





[DeeAnne McCallin] 17:43:10

You can grab it. From our web page, it is posted. It's a how to guide about the participant directory.

[DeeAnne McCallin] 17:43:16

Participant that chooses to use point-to-point interfaces to its own technology by choosing self.

[DeeAnne McCallin] 17:43:24

Must also enter. A URL to a public web page at which to find more information on how to establish the connection.

[DeeAnne McCallin] 17:43:33

So again, self is really indicating that the participant is you is looking to build a point-to-point interface to its own technology for exchange.

[DeeAnne McCallin] 17:43:44

Which is why a URL and or you need to do one of these a URL and I mean or an email and a phone number.

[DeeAnne McCallin] 17:43:55

You could also do both. You could give a URL. You can give an email address and of phone number.

[DeeAnne McCallin] 17:44:00

But if you don't give a URL you must give an email address and a phone number of the technical contact that maintains the point-to-point interfaces.

[DeeAnne McCallin] 17:44:09

And yes, that person should expect some phone calls from some other participants. Participant that chooses other must provide the name of the intermediary and contact information to allow CDI to determine whether the intermediary can be included in the participant directory choices for exchange type.





[DeeAnne McCallin] 17:44:28

It remains the responsibility of the participant to ensure it uses intermediary services. In compliance with the DSA and its policies and procedures for any participant that's.

[DeeAnne McCallin] 17:44:40

For an intermediary that's not a signatory to the to the data sharing agreement but that's where we will be doing some degree of vetting if you select other and then that will make a determination on the CdI side whether.

[DeeAnne McCallin] 17:44:56

Said intermediary will be added to the pick list for other people to be able to choose and select as well.

[DeeAnne McCallin] 17:45:06

Already. How does the participant directory help enable exchange? So the background here. Is that the technical connection details and endpoint URLs, certificates, and the ones and those often found in the networks directory may present a security risk if made publicly available.

[DeeAnne McCallin] 17:45:29

Which is why our participant directory listening will not. First off, the applications not collecting that and our listing will not publish anything like that.

[DeeAnne McCallin] 17:45:38

Intermediaries manage their own directories that include connection details. So So how the data exchange framework participant directory listing can be used is that the listing will point participants to a particular intermediary.

[DeeAnne McCallin] 17:45:52

Then they use that intermediaries directory to gain connection details necessary. So that's where we're in essentially leaning upon processes and security measures and things that are already built out in by the organizations whose business it is to be an intermediary, the data exchange framework, CDI, where the rules that the rules of the road were not the host of.

[DeeAnne McCallin] 17:46:22





Like a hub of data coming in to us and going out. So this is why one of the reasons why we're having the technical detail information is not what we're collecting and not what we're publishing in.

[DeeAnne McCallin] 17:46:37

Participant directory listing. The advantages are connection details remain secure and connection details are maintained by the intermediaries that are the authoritative for and have control over verifying the connection information.

[DeeAnne McCallin] 17:46:52

So a lot of getting us to this place came from our engagement and worked with stakeholders through at least the second half of 2023 and in finalizing our participant directory PNP.

[DeeAnne McCallin] 17:47:09

And with that, we're ready to actually start the walkthrough demo.

[Rim Cothren] 17:47:16

Thanks, Diane. I'm going to stay off camera so that people don't have to watch me looking back and forth between my screen.

[Rim Cothren] 17:47:23

And, my notes here. I hope you will forgive me for that. Going to share my screen.

[Rim Cothren] 17:47:32

People should now see. My browser? Which is pointed to. The CDI data exchange framework web page.

[DeeAnne McCallin] 17:47:42

And yes, we did.

[Rim Cothren] 17:47:42

That's where we'll start today's demo.





[Rim Cothren] 17:47:47

So if you look here at the top of the web page, there is a DSA signing portal and participant.

[Rim Cothren] 17:47:53

Directory accordion, you click on the plus there. This gives you links to different information about both the signing portal and the participant directory.

[Rim Cothren] 17:48:04

And we're going to start with this link right here, which is to sign into the DSA signing portal.

[Rim Cothren] 17:48:11

That is the same portal that we use. For the participant directory. So I'll start there.

[Rim Cothren] 17:48:18

That brings us to the signing portal. People that have already signed the data sharing agreement. This page should be familiar to you.

[Rim Cothren] 17:48:29

And it is important to understand that you must have signed the data sharing agreement before you can complete choices in the participant directory.

[Rim Cothren] 17:48:41

I'm gonna sign in.

[Rim Cothren] 17:48:44

To the portal here.

[Rim Cothren] 17:48:47

I'm using.





[Rim Cothren] 17:48:51

Hold on. I can't talk and type my password at the same time, so give me a second.

[Rim Cothren] 17:49:03

Apparently I can't be quiet and type my password at the same time.

[DeeAnne McCallin] 17:49:08

You were intentionally showing them that if you enter the wrong password, it'll tell you incorrect.

[Rim Cothren] 17:49:14

Nice try. Thank you. As people probably saw in an email sent out to them we have enabled 2 factor authentication on the signing portal.

[DeeAnne McCallin] 17:49:16

Okay.

[Rim Cothren] 17:49:26

This is the page that'll send you to. You'll note that it is indicating the email address that it's going to send a verification code to.

[Rim Cothren] 17:49:36

Make sure that you press on the SIN verification code. I'm going to go off screen here for a second and wait for that code to be sent.

[Rim Cothren] 17:49:46

Normally it takes a couple of seconds for you to receive that code. And that's what I'm waiting for.

[DeeAnne McCallin] 17:50:01

While Rim is waiting for that code, a couple questions have come in. Who's email address?





[DeeAnne McCallin] 17:50:10

Who is this admin who has the login and it is it is only one person per organization. So that's definitely a, frequent frequently asked question and so if if rim is logging in to this organization right now rims email and his password is the only one that can get in even if like I work with him for the same company, I can't get here.

[Rim Cothren] 17:50:37

Thank you, Dean. So I received that email. It has a 6 digit code in it.

[Rim Cothren] 17:50:42

I have typed that code into the verification code here and I'll press the verify code button in just a second.

[Rim Cothren] 17:50:48

If I never received that email, I could press the button, send new code, and it would send me a new code.

[Rim Cothren] 17:50:56

There is also a time limit in which you you have to verify that code. So if you are taken away from your computer and don't put in your verification code and don't put in your verification code in time, you can ask to send a new verification code in time, you can ask to send a new verification code.

[Rim Cothren] 17:51:10

I put that in. My address has been verified. I can now continue. You do have to press the continue button and it'll bring you back into the data sharing agreement signing portal.

[Rim Cothren] 17:51:21

You notice here that it now has my name and that I am signed in.

[Rim Cothren] 17:51:27

The next step is to go to my organizations and my organizations contains information. That you previously filled in when you signed the data sharing agreement.





[Rim Cothren] 17:51:39

And this is the information that I put in when I signed the DSA. There is a primary organization.

[Rim Cothren] 17:51:49

This is my organization demo organizations for today and at the time that I signed the data sharing agreement I identified.

[Rim Cothren] 17:51:57

3 subordinate organizations as Demo Hospital One. Demo hospital 2 and demo lab one. Those 3 organizations as well as the primary organizations all appeared on my data sharing agreement when I signed it.

[Rim Cothren] 17:52:14

Important here is that you need to check. That your data share. D DSA document has actually been signed if you believe that you assigned the DSA document has actually been signed.

[Rim Cothren] 17:52:27

If you believe that you have signed the DSA and your account status is something other than DSA documents signed.

[Rim Cothren] 17:52:32

Please send an email to dxf.chhs.ca.gov and ask for help.

[Rim Cothren] 17:52:41

This must be DSA documents signed for you to see the participant. Button that is up here, the participant directory button that's up here.

[Rim Cothren] 17:52:53

So let's go ahead and launch. The participant directory. By pressing that button. Again, you will see my primary organization.



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[Rim Cothren] 17:53:03

And the 3 subordinate organizations that I listed on my DSA automatically filled in here for me.

[Rim Cothren] 17:53:11

Now folks that signed the DSA some time ago won't see no in this column. This shows up no for me because I signed the DSA in preparation for this demo.

[Rim Cothren] 17:53:22

Yes, today. If you signed it prior to the launch of the participant directory. These will be blank, but they will fill in for you as you complete the participant directory.

[Rim Cothren] 17:53:35

Again, they show up as no for me because I signed the DSA yesterday.

[Rim Cothren] 17:53:41

Your first action here that we'd recommend is to fill in the information for the primary organization. So I click on demo organization.

[Rim Cothren] 17:53:52

And I'm brought to the form that allows me to send to fill in information about my primary organization.

[Rim Cothren] 17:53:58

I'm gonna go ahead and list my choices here. So I am going to choose from the dropdown list a choice for how I want to receive a request.

[Rim Cothren] 17:54:10

4 HSSI. And for demo purposes, today I'm going to use a health exchange, but you'll see that there are a number of nationwide networks and frameworks that are listed here.

[Rim Cothren] 17:54:23





Along with the QHIOs. Self, other, and not applicable. And we'll get to self other and not applicable here in a moment, but for demo purposes, again, I'm going to use the health exchange.

[Rim Cothren] 17:54:35

So I'll choose the health exchange for how to ask me for information. I'm also going to choose ehealth exchange for how other entities will send information, HSSI information to me in response to an order, a referral or other information is generated by another participant And for the purposes of the demo here, I'm going to choose not applicable for ADT.

[Rim Cothren] 17:55:04

Because I as the primary organization do not want to be responding to admissions and discharges. I will in a few moments fill in those choices for the hospitals that are subordinate to me.

[Rim Cothren] 17:55:20

Now I'm not exercising my option to delay providing exchange. Of information. We'll get to that in a minute.

[Rim Cothren] 17:55:28

But I am going to take a shortcut here and say, copy my choices. For my primary organization.

[Rim Cothren] 17:55:34

Into the subordinate organizations listed on my DSA. And important thing to remember is once you've filled in your choices and determined which which of any of these boxes you want to check.

[Rim Cothren] 17:55:47

And is not to go back to back to participant directory. That will return you to that page but will not save this information.

[Rim Cothren] 17:55:58

Need to go to the bottom of the page. And click save and close. So I'll do that.





[Rim Cothren] 17:56:04

And because I, I checked the copy, the choices for this primary organization to all subordinate organizations.

[Rim Cothren] 17:56:13

In a minute you will see that that information has been listed not only for my demo organization here at the top.

[Rim Cothren] 17:56:21

Where it shows a health exchange, e-health exchange. And not applicable. But it is also been copied.

[Rim Cothren] 17:56:28

Into the choices for the subordinate organizations as well. Now in a minute we're going to go in and we'll make changes to those.

[Rim Cothren] 17:56:39

Also, as I said before, it already had said no for delaying exchange until 2026. When I entered the participant directory.

[Rim Cothren] 17:56:50

For those of you that sign the DSA. Before the launch of the participant directory where these would be blank.

[Rim Cothren] 17:56:59

They would now say no to reflect that you did not check that box.

[Rim Cothren] 17:57:05

Now as I said, I've completed the choice for the primary organization. But I wanna make changes to how hospital one.

[Rim Cothren] 17:57:14





Hospital 2 and Demo Lab One. Actually want to exchange information under the DXF. I'm gonna start down here with the lab.

[Rim Cothren] 17:57:25

So I click on the name of the lab. You see here that it has filled in those choices as they appear here.

[Rim Cothren] 17:57:33

But you can imagine that a laboratory doesn't want to actually Receive health and social services information.

[Rim Cothren] 17:57:41

So I'm going to make a change here. And say this is not applicable. If you take a look at the technical requirements for exchange.

[Rim Cothren] 17:57:50

It requires all organizations. To enter a choice for. Request for information. But, organizations, it is optional for organizations for that they will receive HSSI.

[Rim Cothren] 17:58:06

And so this lab is choosing not to receive HSSI. Over the data exchange framework. The data exchange framework again, ADT events or admissions and discharges Don't aren't a requirement for a lab and actually don't make sense for a lab.

[Rim Cothren] 17:58:26

So I'll leave that as not applicable. Again, don't go back to the participant directory summary page.

[Rim Cothren] 17:58:34

But go to the bottom of the page. And click save and close.

[Rim Cothren] 17:58:42





Now if I look at the bottom, my information for the demo lab has been updated. So that not applicable shows for information delivery.

[Rim Cothren] 17:58:53

Let's go make a change for hospital one. Hospitals. EDs. Excuse me hospitals and emergency departments are required to provide Notifications.

[Rim Cothren] 17:59:11

Of admissions and discharges. So I need to change this not applicable to some other choice. I can choose anything that appears here, QHIOs may, may be an option for me to use.

[Rim Cothren] 17:59:25

But for the demonstration today, I'm gonna choose self. Self means that I'm going to use point-to-point connections to my own technology.

[Rim Cothren] 17:59:35

To serve notifications for admissions and discharges. And when I choose self, you can see that I am required to put in some additional information.

[Rim Cothren] 17:59:48

I need to put in either. A URL where I am providing additional description of how to contact me to establish the point to point interfaces.

[Rim Cothren] 17:59:59

This must be a URL. To a publicly available web page. I'm gonna go ahead and fill something in.

[Rim Cothren] 18:00:06

I am also required to give an email address. And a phone number for a contact person. Now what if you refer to the participant directory PNP, it will tell you that you must provide either a URL or a business address and phone number.

[Rim Cothren] 18:00:29





I'm going to choose to put in all 3 of those. Now, importantly, if I choose cell for one of these other options.

[Rim Cothren] 18:00:37

You will see that I only get one option. For the information that I include here. I don't get an option to include different contact information for different types of exchange.

[Rim Cothren] 18:00:50

I'm going to move that back to e health exchange, but that's an important point here is you must provide a single point of contact.

[Rim Cothren] 18:00:59

For all types of exchange. Again, I'll go to the bottom. And press save and close.

[Rim Cothren] 18:01:07

And what you'll see here that's changed is there is now self for requests for notification of ADT events.

[Rim Cothren] 18:01:15

The other information that you entered is available in the participant directory listing but does not appear on this page.

[Rim Cothren] 18:01:24

If however I go back into the demo hospital, that information appears here and you can change it. If you need to update that.

[Rim Cothren] 18:01:37

I'm also going to go in and change, the request for notification of ADT events for hospital 2.

[Rim Cothren] 18:01:46

In this case, I'm going to choose other. Other is the choice that you use if you do not find the intermediary.





[Rim Cothren] 18:01:55

On the pull down list. So you can imagine that there is another participant or another intermediary that is not a participant that is providing this service.

[Rim Cothren] 18:02:05

And you're going to choose to use them. Again, when I choose that, I'm requested to enter additional information.

[Rim Cothren] 18:02:13

The name of the entity that's providing that service. I'll give a fictitious entity here.

[Rim Cothren] 18:02:18

I'm at least not aware of ADT Service Inc. As such an organization. And I'm required to give a business email and phone number for that organization.

[Rim Cothren] 18:02:30

And CDI may use this information to contact that entity and determine whether they offer a service that is compatible with the DX.

[Rim Cothren] 18:02:42

It is still the responsibility of participants to choose another organization to provide their services to make sure that those services meet the requirements of the DSA.

[Rim Cothren] 18:02:54

And the policies and procedures. Importantly, if I choose other for another organization, excuse me, another exchange type here, I'm asked for that other information again.

[Rim Cothren] 18:03:06

So I may choose 3 different. Other organizations to provide exchange services. I don't have to just choose one to do them all.





[Rim Cothren] 18:03:19

I'm again going to go back to e health exchange. Leave others selected here. And save in clothes.

[Rim Cothren] 18:03:27

So now I've completed the choices for the 3 subordinate organizations that were listed on my DSA.

[Rim Cothren] 18:03:35

But what if there are additional subordinates? Or department or other organizations within my primary organization. That want to share information over the DXF in different ways than I've selected up here.

[Rim Cothren] 18:03:50

But in that case, I click on add a subordinate organization. To the participant directory.

[Rim Cothren] 18:03:56

If I do that, it asks me the name for that organization. I'm gonna start off with entering demo psych hospital one.

[Rim Cothren] 18:04:08

And in this case, I'm going to choose to exercise my option to delay providing exchange of health and social services information under the DXF until January, the 30 first, 2,026.

[Rim Cothren] 18:04:20

And importantly, I can only check that box. If I am permitted to do so under health and safety code section 130290 Paragraph B 2 or the requirement for exchange health and social services information PNP.

[Rim Cothren] 18:04:38

So you should review this paragraph in the law or this P and P to determine whether you are eligible to check this box.





[Rim Cothren] 18:04:48

If you are, then you may exercise that right by checking it. This is the only way where you can identify that you are delaying exchange of.

[Rim Cothren] 18:05:01

HSSI over the DXF until January 30 first 2026 Now you may continue and enter choices for how you will.

[Rim Cothren] 18:05:13

Exchange information. But you are not required to under the PNP and I'm going to choose not to.

[Rim Cothren] 18:05:20

And press save and close.

[Rim Cothren] 18:05:23

What you'll see now is under supported organization. I have a fourth organization listed here. And it says yes for delaying exchange until 2026.

[Rim Cothren] 18:05:34

Does not include any choices here. And the choices here were not copied from the demo organization because I clicked yes on that I am delaying.

[Rim Cothren] 18:05:49

Now I have one more subordinate organization that I want to add.

[Rim Cothren] 18:05:54

In this case. Since I signed the DSA. My, skilled nursing facility is installed in EHR and wants to participate in, the data exchange framework.

[Rim Cothren] 18:06:08

So I will enter the name. Of the skilled nursing facility here that I'm putting down here is demo.





[Rim Cothren] 18:06:16

Sniff one

[Rim Cothren] 18:06:19

And because I want to save a couple of steps, I'm going to click the box here that says copy the choices from this subordinate organization.

[Rim Cothren] 18:06:28

From those of its primary organization. I could go ahead and change, excuse me, I could go ahead and select organizations here.

[Rim Cothren] 18:06:37

But I'm going to choose to copy them from the primary instead. If I click save and close.

[Rim Cothren] 18:06:45

You'll see that it is copied. E health exchange, e health exchange, and not applicable.

[Rim Cothren] 18:06:52

Into this line here as well.

[Rim Cothren] 18:06:55

Now for the demo today, I'm not gonna go in and make any changes to the choices here.

[Rim Cothren] 18:07:02

I could go in. And change any of these choices here. I could also go in and choose optionally.

[Rim Cothren] 18:07:11

For the skilled nursing facility to provide notifications of admissions and discharges. But I'm not going to choose to do that today.





[Rim Cothren] 18:07:22

So I'm done now filling out the participant directory for my organization. Should take a look and check your choices here to make sure that the primary organization and all of the subordinate organizations reflect the information that you added.

[Rim Cothren] 18:07:40

And then you can leave the participant directory portion of the portal. By clicking on back to my organizations.

[Rim Cothren] 18:07:49

This brings you back to the familiar data sharing agreement page. And importantly, you'll see that no information changed on this page.

[Rim Cothren] 18:07:59

That the subordinate organizations here. Still reflect the subordinate organizations that you put on your data sharing agreement when you signed it.

[Rim Cothren] 18:08:11

And the additional subordinate organizations that I added. We're not automatically added here. If you do want to add them.

[Rim Cothren] 18:08:19

And you'll need to add them and sign a new DSA.

[Rim Cothren] 18:08:24

That really brings us to the end of our demo today. I'm going to finish up by clicking on my name and signing out of the data sharing agreement portal.

[Rim Cothren] 18:08:37

And that returns me to the login page. Dean, I think things are now back to you for any questions that you want to.

[Rim Cothren] 18:08:46





[DeeAnne McCallin] 18:08:48

Great. Thank you, Rim. So we're a minute or 2 ahead of schedule or so. That's fantastic.

[DeeAnne McCallin] 18:08:54

We've had a lot of questions. Coming in. Thank you, everyone. I can't promise that you're not gonna need to go back or, navigate to screenshots of the demo, but.

[DeeAnne McCallin] 18:09:07

Earlier I mentioned one. User accounts like how Rim was just logged in if I worked for demo Oregon Rimwork for demo or we only are allowed to have one that's correct.

[DeeAnne McCallin] 18:09:21

It's a limitation, but, but it is only one. If R. Gets promoted and he no longer is a person that needs to maintain or update or enter the choices.

[DeeAnne McCallin] 18:09:34

He can email the dxf@chhs.ca.gov email and say I'd like to request a change in the admin for our for our There I am.

[DeeAnne McCallin] 18:09:50

Saying that word from days gone by for the DSA signing portal. 2 dn@demo.org so we can make a chain in who the administrative user email is and who owns the account we can do that but we can still only do one we can't Rim can't ask Can you please add DN and keep me?

[DeeAnne McCallin] 18:10:15

There are 2 different entities in there. It does not need to be the signatory of who signed the DSA.

[DeeAnne McCallin] 18:10:24

So maybe your CEO signed the DSA, but it's. Somebody in the grants part of your organization because they were paying attention to our grants program.





[DeeAnne McCallin] 18:10:35

Maybe they created the accounts and they might not be the person who wants to have this technical response of what to put in, but they would be the person you don't need to go chasing down your CEO because they signed, but that grant person would either need to go find the answers and enter them.

[DeeAnne McCallin] 18:10:52

The ourselves or ask us to make a change in who has the access. That administrator would then no longer have access because it would moved on to the other person.

[DeeAnne McCallin] 18:11:03

So now let's look, there's a lot of questions that we have actually answered.

[DeeAnne McCallin] 18:11:08

I'm going to glance at some of those rim while I'm doing that if you see other new questions you you might be able to read any of those right now.

[DeeAnne McCallin] 18:11:17

Way back somebody was asking about the 2 start dates and there's been a couple other questions about it.

[DeeAnne McCallin] 18:11:23

The 2024 and 26. So, 2026 is because in the original legislation, they be 1 33 which was then codified in health and safety code 1 3 0 2 9 it calls out certain organizations that are able to wait until 20 sixth to do exchange.

[DeeAnne McCallin] 18:11:42

And in our PNP, we also mentioned some organizations that have that don't that can wait until the voluntary folks who have signed on.

[DeeAnne McCallin] 18:11:53

Like that can be wait until 2026. So that's the difference in those 2 dates.





[DeeAnne McCallin] 18:11:59

We cannot make that decision for you. We cannot make that decision for you. CDI. I cannot make that decision for you.

[DeeAnne McCallin] 18:12:05

So, one question came in saying at the time that we signed, one question came in saying at the time that we signed, we reviewed the rules and saw that we said at the time that we signed, we reviewed the rules and saw that we fit the eligibility to delay until 26 but maybe we fit the eligibility to delay until 26 but maybe we now hire 10 more providers to delay until 26, that we fit the eligibility to delay until 26, but maybe we now hire 10 more providers and we might have crossed a certain

[DeeAnne McCallin] 18:12:21

threshold, that you would need to assess. Your eligibility is not based upon on the moment when you sign the DSA but kind of live and in the moment.

[DeeAnne McCallin] 18:12:31

But that is a CDI I cannot say to you. Yes, you're 26 or no you're not.

[DeeAnne McCallin] 18:12:40

We do not have a delegation authority so that an intermediary or a third party can do this on behalf of your yourself so it is the actual participant that who has the obligation to fill in and submit.

[DeeAnne McCallin] 18:12:55

You can lean on these intermediaries in third parties to help guide you as to what your choices should be.

[DeeAnne McCallin] 18:13:04

But you should actually be doing the keystroking and that's part of the like the controls the checks and balances that we have included in incorporating.

[DeeAnne McCallin] 18:13:11





The webinar is, this is being recorded. And it'll be posted on our web page.

[DeeAnne McCallin] 18:13:16

In the chat and also in the answer boxes to some, but in the chat we have dropped the links to the how to guide so it has a lot of screenshots in it and it covers a lot of what Rim just spoke through.

[DeeAnne McCallin] 18:13:31

So it's a great resource as you're in the guide for when you're in the participant directory.

[DeeAnne McCallin] 18:13:37

Let's see. Some folks are looking in the drop down arrow for actual nationwide framework to in their drop-down choices.

[DeeAnne McCallin] 18:13:48

You will only see the organizations a couple different national networks, but you won't see if you don't see it there, then you should be entering the word other.

[DeeAnne McCallin] 18:13:59

And filling in the choices, the bottom of the screen has a little kind of instruction thing that if you choose self do this if you choose other do enter this information and the field should also open up if you select self or other to fit that in.

[DeeAnne McCallin] 18:14:18

Someone did ask a question about whether their EHR like that they don't see it.

[DeeAnne McCallin] 18:14:24

How do they enter that in? Typically, an EHR is not an intermediary. It's the way that you would capture and then go through an intermediary.

[DeeAnne McCallin] 18:14:33

But if you really truly think that your answer has to be an EHR and you don't see it listed in the tick list then you would enter the word other and fill in that EHR like EHR.





[DeeAnne McCallin] 18:14:48

First one ever and then the business email address and then CVII would go to vet that we would either come back to you and say that's not an intermediary or we would make the determine that determination that they do have the capability and functionality and we would add them to the pick list.

[DeeAnne McCallin] 18:15:05

And let you know that you could then go in and choose them.

[DeeAnne McCallin] 18:15:13

So it's, it's not the signer of the DSA, but that person with the.

[DeeAnne McCallin] 18:15:19

With the special admin account who can indeed be the same signer. You email us if you need to change because that person or the people working on it within your organization has changed.

[DeeAnne McCallin] 18:15:37

We are looking at 10 days from January 30 first. Or when war. When everybody should be entering these choices.

[DeeAnne McCallin] 18:15:49

We recognize that's a bit of a lift. There's a lot of folks that we might be needing to help with multi-factor authentication verifications, password resets.

[DeeAnne McCallin] 18:15:58

Changing the who has the admin accounts, but we're here to help you and that's why we have a published guide as well to help.

[DeeAnne McCallin] 18:16:08

And then I think I'm starting to see if there's any other questions that I should be lifting up.





[DeeAnne McCallin] 18:16:18

Someone did ask, can a QHI or other intermediary advise and assist on the participant directory?

[DeeAnne McCallin] 18:16:26

Choices and answers. So yes, they can assist and guide you on that, but they cannot do the actual entry on your behalf.

[DeeAnne McCallin] 18:16:41

This question actually came in a couple times, so, so I'll speak it if. If you see an intermediary that is listed, so Rim went through and you all probably saw a couple of different ones.

[DeeAnne McCallin] 18:16:53

People are saying can we assume they are they are our answer are appropriate. It's Essentially, you can assume that, but it is still up the responsibility of the participant.

[DeeAnne McCallin] 18:17:09

To ensure that that organization and your workflow is in compliance with the data sharing agreement and the policies and procedures.

[DeeAnne McCallin] 18:17:17

So Sometimes through 2023 we leaned upon. Few years back, the federal certification of EHRs.

[DeeAnne McCallin] 18:17:27

That was a baseline requirement needed to become a meaningful user. But the fact that you might have purchased or had a license to a certified EHR was not de facto that you were a meaningful user.

[DeeAnne McCallin] 18:17:39

You needed to actually use the EHR according to the other rules. So So there's a little bit of a parlay there that comports here that, yeah, you see your intermediary, you have selected them.

[DeeAnne McCallin] 18:17:52





Now you need to actually use them and and be able to exchange and have onboarded and have the technical, the capabilities of exchange going.

[DeeAnne McCallin] 18:18:02

And so that's where we stop shy of saying, yes, but you can assume that's appropriate and you can assume that's appropriate and you're good.

[DeeAnne McCallin] 18:18:09

Other responsibilities and making sure you also should we would I would caution you not to select someone and not have it be an organization or a technology that you that you're working on or either have, a relationship with.

[DeeAnne McCallin] 18:18:26

So it's, not just choosing who you think is a good idea or who sounds like they might be in your neighborhood if you're if you don't know them and you don't have a relationship with them.

[DeeAnne McCallin] 18:18:41

You can find who has signed, some of you, oh, that another good question was, am I correct in understanding that I won't be able to get to the participant directory if I haven't signed a DSA.

[DeeAnne McCallin] 18:18:53

That is correct. So, you can get to the signing portal. By creating an account, but that won't help you find out if you're if you're not sure if you organization has assigned DSA I would recommend you go to our signatory list first if anybody can drop that into the chat that would be great.

[DeeAnne McCallin] 18:19:14

We updated every week typically on a Monday. Once in a blue moon, like after a federal holiday, we might upload it on a Tuesday.

[DeeAnne McCallin] 18:19:25

This week it was not uploaded until Tuesday because we were doing some testing with the participant directory listing, but it's usually updated every Monday.





[DeeAnne McCallin] 18:19:33

And so if you go to that list and look for, you know, search it for a couple keywords to see if your organization, if you find yourself there but you don't have the login you could try the reset password.

[DeeAnne McCallin] 18:19:44

Or you could email us and ask who is the admin and, how do I get to be the admin if that person's already left that type of, but otherwise you can get it into the signing portal.

[DeeAnne McCallin] 18:19:56

You have the admin, the email, and you have your password, you might see on the one screen where it says DSA created.

[DeeAnne McCallin] 18:20:05

It's in the middle of a screen. Once you're in my organizations, it'll say created instead of DSA signed.

[DeeAnne McCallin] 18:20:12

When it says DSA sign, that's where a little bit up to the left.

[DeeAnne McCallin] 18:20:16

Is that dark blue box that says participant directory. So if you're in the signing portal, you and you're not seeing participant directory.

[DeeAnne McCallin] 18:20:25

It's likely either you created a new account that's not associated and can't find your organization signed DSA and it never will.

[DeeAnne McCallin] 18:20:34

Or your DSA is actually not signed. Sometimes DSAs are in this middle, no man's land of scent, but not signed.

[DeeAnne McCallin] 18:20:42





So if you really think you have signed and you're not finding yourself and it's not saying.

[DeeAnne McCallin] 18:20:47

DSA sign when you're logged in, please reach out to us and we'll help you find that DSA to get it signed.

[DeeAnne McCallin] 18:20:56

Let's see.

[DeeAnne McCallin] 18:21:00

So you won't have access to the participant directory now rim dig cover when you get into the participant directory, you might be an organization.

[DeeAnne McCallin] 18:21:11

Listed to subordinates, but now that you're into the weeds of this you're thinking okay but there's really 10 different we've used the word instances over on the grant side of the the house the grant program side maybe there's 10 different instances and locations and facilities that need that do different exchange.

[DeeAnne McCallin] 18:21:36

That's where you would enter the choices for the 2. You would enter the choices for the primary at the higher level and then you could enter 8 more subordinates through the participant directory.

[DeeAnne McCallin] 18:21:48

That would not change your DSA. That your DSA would still only have subordinates, but your participant directory and the directory listing would show all 10 where it's the original 2 plus the 8.

[DeeAnne McCallin] 18:22:00

You do not add your intermediary as a subordinate. That's not an organization.

[DeeAnne McCallin] 18:22:07





If you're adding them as a subordinate in the PD or the DSA signing portal side, they are entities and locations that you have authorization over.

[DeeAnne McCallin] 18:22:18

It's not a third party somebody outside of your. Kinda old school 4 walls.

[DeeAnne McCallin] 18:22:25

Let's see, and I haven't been to the other tab for other questions, so I should probably jump to that and start looking.

[DeeAnne McCallin] 18:22:35

Oh, somebody asked. I might need to call in or rim about. What if I accidentally entered a subordinate that I didn't mean to and I need to delete?

[DeeAnne McCallin] 18:22:48

What does somebody do?

[Kasham Montenegro] 18:22:53

If the subordinate. Was not included. In the DSA or is being added only to the participant directory, you can reach out to CDI for request.

[Kasham Montenegro] 18:23:04

To have this subordinate deleted. You cannot delete them on your own. That's not a feature that we included in the directory, but it can be deleted on the back end for you.

[DeeAnne McCallin] 18:23:14

Thank you, Kassima. And we actually, one of the reasons why we don't make the leading easy is because if you're in the participant directory and you're like heck that's not one of our subordinate locations or facilities but if it's on the other side of the portal and assigned DSA.

[DeeAnne McCallin] 18:23:32

That would amend and change the DSA a legal agreement. So that's where we need this like hard wall between the 2.





[DeeAnne McCallin] 18:23:39

I'm so coming in to request. It's add some administrative steps, but it's worth not playing with.

[DeeAnne McCallin] 18:23:48

Assigned agreement. And so the process and the email to the DXF at CDI at CH.

[DeeAnne McCallin] 18:23:56

That ca.gov saying accidentally entered some subordinate organizations in the participant directory can you help delete those?

[DeeAnne McCallin] 18:24:10

Rim, someone did ask and maybe we can jump if there's a slide. If we have an if we have the appendix with any of the screenshots and can can you explain the third checkbox regarding the ADT?

[DeeAnne McCallin] 18:24:24

So I'll use the terminology of the 3 types of exchange so the ADT one is the third type of exchange.

[Rim Cothren] 18:24:36

So sure, I can try to explain real quickly. Let me share my screen again. Well, I was.

[Rim Cothren] 18:24:43

While Dean was talking. I logged on to the sharing portal. Ken, excuse me, the DSA.

[Rim Cothren] 18:24:51

Signing portal again. And so, you don't have to watch me go through typing in my password, etc.

[Rim Cothren] 18:24:59





And so I'll go back to. Where I left us on the signing page. I'll go to the participant directory.

[Rim Cothren] 18:25:08

Go into the demo organization. I can choose any of them because all organizations and subordinate organizations have all 3 choices.

[Rim Cothren] 18:25:18

And what I list here. Is my choice for the entity that would be the intermediary or technology. So also perhaps myself or some other entity that is not a QHIO or not yet listed.

[Rim Cothren] 18:25:35

To use to request notifications. This is not necessarily the method that notifications will be sent. Using but this is how how to request notifications and the choices there currently are the 9 QHIOs self to indicate that you should be that the participant should be contacted for how to submit requests for notifications.

[Rim Cothren] 18:26:06

Other for if another entity not currently listed on this list is to receive requests for notifications. Or not applicable if this does not apply to your organization.

[Rim Cothren] 18:26:21

For example, if you are not a hospital, emergency department. Or a sniff that is choosing to provide admissions and discharges.

[Rim Cothren] 18:26:32

I'm not gonna make that change today, for that organization. Dean, do you think that that answered the question that was asked?

[DeeAnne McCallin] 18:26:40

I hope so because I've rambled through and it's 3 26 so thank you really.

[DeeAnne McCallin] 18:26:45





Okay. Someone did ask whether there are and I wanted to move to this slide so people can stare at it a little bit.

[DeeAnne McCallin] 18:26:55

We this is what our webpage is looking at. It's the very top of it now has this DSA signing portal and participant directory gray box that has a dropdown and then when you drop that down don't go to the sub box about the PMPs but when you drop that down is where you can find the actual listing.

[DeeAnne McCallin] 18:27:15

Which is a flat file machine readable file that was posted earlier today where you can find the DSA signatory list that is updated every Monday.

[DeeAnne McCallin] 18:27:25

We can quickly go, I, I heard that one or 2 people have their hand raised. I don't have line of sight into that.

[DeeAnne McCallin] 18:27:34

We are short on time but willing to at least hear a question or 2. And then we will collect everything that's in.

[DeeAnne McCallin] 18:27:45

If anything's pressing on what you have submitted today that you are stressed over anything, please lift it up and put it into the dxf@chhs.ca.cov email.

[DeeAnne McCallin] 18:27:54

And we'll be building those as they come in. So, there's somebody with a hand raised.

[DeeAnne McCallin] 18:28:00

Do you like to call on?

[Alice K - Events] 18:28:00

Alright, first up we have Kyle. Kyle, you should now be able to unmute.





[Kyle Ruth-Islas] 18:28:12

Thank you. My question was answered. I appreciate it.

[Alice K - Events] 18:28:19

Okay.

[DeeAnne McCallin] 18:28:19

Thank you.

[Alice K - Events] 18:28:22

Alright, next we have, Giselle. G, you should not be able to unmute.

[Grysell Gutierrez] 18:28:30

Hi, I think my question was already answered. I was asking if we are having multiple users or just just one user per practice.

[DeeAnne McCallin] 18:28:46

Just one per practice, yes.

[] 18:28:53

Thanks.

[Alice K - Events] 18:28:53

Well, thank you. Next we have Lucy, Lucy, you should not be able to unmute.

[Lucy Johns] 18:29:01

Yes, I was wondering once directory information is completed. Is there a lag time before that information goes live for all to see?





[Lucy Johns] 18:29:12

In other words, Do you vet every completed form first? And therefore, when does it go live?

[Lucy Johns] 18:29:19

Thank you.

[DeeAnne McCallin] 18:29:20

Great question. It's live right now, the first publication. So it's on our web page.

[DeeAnne McCallin] 18:29:27

I cannot do a direct link to it. It would it because it comes in as a flat file but if you go to the what's on the screen right now the gray box that says DSA signing portal and participant directory.

[DeeAnne McCallin] 18:29:42

The first the first section you'll see will be about DSA the data sharing agreement and then right below it is participant directory and I think it's the third bullet out of 5 is a link to the participant directory listing and per the PNP CDI is publishing that at least weekly.

[DeeAnne McCallin] 18:30:02

So when you see responses that say other in in a in this field. We're vetting it so it shouldn't stay other forever It will, we will then do outreach.

[DeeAnne McCallin] 18:30:19

We'll do the vetting and then it'll come back out but it may a few weeks so end over and still say other and then one day it may change.

[DeeAnne McCallin] 18:30:27

So this listing should be posted weekly. We are also working on revising the DSA signatory list.

[DeeAnne McCallin] 18:30:34





What's posted today is a flat file intended for machine readable for technology. To upload it and put it in, which starts to get outside of my pay grade.

[DeeAnne McCallin] 18:30:47

And skill set, but It is readable. You can open it up as a CSV or as an Excel and you can make heads or tails out of it to some degree and we're working on revising the DSA signatory list.

[DeeAnne McCallin] 18:31:01

Participant directory responses and fields in there.

[DeeAnne McCallin] 18:31:09

And with that, we're at the bottom of the hour. So we have a lot of great questions.

[DeeAnne McCallin] 18:31:14

This is really focusing on California participants who have signed the DSA. And people can still go in and sign a DSA today.

[DeeAnne McCallin] 18:31:24

And. Be in touch with us on things that work. This is very new.

[DeeAnne McCallin] 18:31:32

We know there's a lift to get folks to respond and put their choices in over the next week, but a lot of us are committed to help you through that.

[DeeAnne McCallin] 18:31:41

And We'll take it from there. Thanks everybody. It's 2024. Let's go.

[DeeAnne McCallin] 18:31:48

Thank you, Rim. Thank you, Kashan, for support. I'm in that events as well.