



Data Exchange Framework

Implementation Advisory Committee (IAC) and Data Sharing Agreement (DSA) Policies and Procedures (P&P) Subcommittee Meeting

Wednesday, January 24, 2024

9:00 AM – 11:00 AM PT



Meeting Participation Options

Written Comments

- Participants may submit comments and questions through the **Zoom Q&A box**; all comments will be recorded and reviewed by CDII staff.
- Participants may also submit comments and questions – as well as requests to receive Data Exchange Framework updates – to CDII@chhs.ca.gov or DxF@chhs.ca.gov.
 - Questions that require follow up should be sent to CDII@chhs.ca.gov or DxF@chhs.ca.gov.

Meeting Participation Options

Onsite

- Members who are onsite are encouraged to log in through their panelist link on Zoom.
 - Members are asked to **keep their laptop's video, microphone, and audio off** for the duration of the meeting.
 - The room's cameras and microphones will broadcast the video and audio for the meeting.
- Instructions for connecting to the conference room's Wi-Fi are posted in the room.
- Please email Amanda Johnston (amanda.johnston@chhs.ca.gov) with any technical or logistical questions about onsite meeting participation.

Meeting Participation Options

Spoken Comments

- **Members of the public and Committee Members** must “raise their hand” for Zoom facilitators to unmute them to share comments; the Chair will notify participants/Members of appropriate time to volunteer feedback.

Onsite		Offsite	
Logged into Zoom	Not Logged into Zoom	Logged into Zoom	Phone Only
<p>If you logged on <u>onsite</u> via <u>Zoom interface</u></p> <p>Press “Raise Hand” in the “Reactions” button on the screen or physically raise your hand</p> <p>If selected to share your comment, please begin speaking and <u>do not unmute your laptop</u>. The room’s microphones will broadcast audio</p>	<p>If you are onsite and <u>not using Zoom</u></p> <p>Physically raise your hand, and the chair will recognize you when it is your turn to speak</p>	<p>If you logged on from <u>offsite</u> via <u>Zoom interface</u></p> <p>Press “Raise Hand” in the “Reactions” button on the screen</p> <p>If selected to share your comment, you will receive a request to “unmute;” please ensure you accept before speaking</p>	<p>If you logged on via <u>phone-only</u></p> <p>Press “*9” on your phone to “raise your hand”</p> <p>Listen for your <u>phone number</u> to be called by moderator</p> <p>If selected to share your comment, please ensure you are “unmuted” on your phone by pressing “*6”</p>

Public Comment Opportunities

- Public comment will be taken during the meeting at designated times.
- Public comment will be limited to the total amount of time allocated for public comment on particular issues.
- The Chair will call on individuals in the order in which their hands were raised.
- Individuals will be recognized for up to two minutes and are asked to state their name and organizational affiliation at the top of their statements.
- Participants are encouraged to use the comment box to ensure all feedback is captured or email their comments to CDII@chhs.ca.gov or DxF@chhs.ca.gov.

Agenda



- 9:00 AM
Welcome and Roll Call
- 9:05 AM
Vision & Meeting Objectives
- 9:15 AM
Qualified Health Information
Organization (QHIO) Program
Updates
- 9:30 AM
Update on Data Sharing
Agreement (DSA) Signatory
Grants

- 9:35 AM
Policies and Procedures (P&P)
Development
- 10:10 AM
Participant Directory Updates
- 10:30 AM
Public Comment
- 10:45 AM
Next Steps and Closing Remarks

Welcome and Roll Call



Speaker Introductions

John Ohanian

CDO, CalHHS
Director, CDII

DeeAnne McCallin

Deputy
Director, CDII

Rim Cothren

HIE Consultant,
CDII

IAC Members (1 of 2)

Name	Title	Organization
John Ohanian (Chair)	Director	CalHHS Center for Data Insights and Innovation
DeeAnne McCallin	Deputy Director	CalHHS Center for Data Insights and Innovation
Dan Chavez	Executive Director	Serving Communities Health Information Organization
Joe Diaz	Senior Policy Director	California Association of Health Facilities
David Ford	Vice President, Health Information Technology	California Medical Association
Aaron Goodale	Vice President, Health Information Technology	MedPoint Management
Lori Hack	Interim Executive Director	California Association of Health Information Exchanges
Cameron Kaiser	Deputy Public Health Officer	County of Solano
Troy Kaji	Associate Chief Medical Informatics Officer	Contra Costa Regional Medical Center and Health Centers

IAC Members (2 of 2)

Name	Title	Organization
Andrew Kiefer	Vice President, State Government Affairs	Blue Shield of California
Matt Lege	Government Relations Advocate	SEIU California
Amie Miller	Acting Executive Director	California Mental Health Services Authority
Ali Modaressi	CEO	Los Angeles Network for Enhanced Services
Lucy Saenz	Assistant Director of Data Informatics	California Primary Care Association
Kiran Savage-Sangwan	Executive Director	California Pan-Ethnic Health Network
Felix Su	Director, Health Policy	Manifest MedEx
Jim Willis	Systems Informatics Leader	CommonSpirit Health

DSA P&P Subcommittee Members (1 of 2)

Name	Title	Organization
DeeAnne McCallin (Chair)	Deputy Director, Data Exchange Framework	CDII
Courtney Hansen	Assistant Chief Counsel	CDII
William (Bill) Barcellona	Executive Vice President for Government Affairs	America's Physician Groups (APG)
Michelle (Shelley) Brown	Attorney	Private Practice
Jason Buckner	Chief Information Officer & Chief Technology Officer	Manifest Medex
Louis Cretaro	Lead County Consultant	County Welfare Directors Association of California
Matthew Eisenberg	Associate Chief Medical Informatics Officer	Stanford Health
John Helvey	Executive Director	SacValley MedShare
Sanjay Jain	Manager, Data Analysis	Health Net
Diana Kaempfer-Tong	Attorney	CA Dept. of Public Health

DSA P&P Subcommittee Members (2 of 2)

Name	Title	Organization
Steven Lane	Chief Medical Officer	Health Gorilla
Kelby Lind	Vice President of Regulatory Affairs	Planned Parenthood Affiliates of California
Sunny Lowell	Acting Chief Privacy Officer	CA Dept. Of State Hospitals
Belinda Luu	Senior Counsel	Kaiser Permanente
Jackie Nordhoff	Director of Regulatory Affairs	PointClickCare
Mark Savage	Managing Director, Digital Health Strategy and Policy	Savage & Savage LLC
Tom Schwaninger	Senior Executive Advisor, Digital Ecosystem Interoperability	LA Care
Elizabeth Steffen	Chief Information Officer	Plumas District Hospital
Lee Tien	Legislative Director and Adams Chair for Internet Rights	Electronic Frontier Foundation
Belinda Waltman	Director of Analytics Integration	Los Angeles County Department of Health Services

Vision & Meeting Objectives



The Vision for Data Exchange in California

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

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



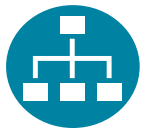
DxF Advisory Committees in 2024

Recap (for New Members)

The purpose of DxF Advisory Committees is to advise CalHHS CDII in the implementation of the Data Exchange Framework



Advisory Committees conduct their business through discussion and consensus building.



Advisory Committees advise and advance recommendations to CalHHS CDII; they do not hold separate decision-making authority.



Advisory Committee Members are appointed by CDII and comprise public and private health care and social service stakeholders and experts.



Members have been selected for their expertise and are expected to consistently attend and actively participate in meetings and provide input on draft materials, as requested.

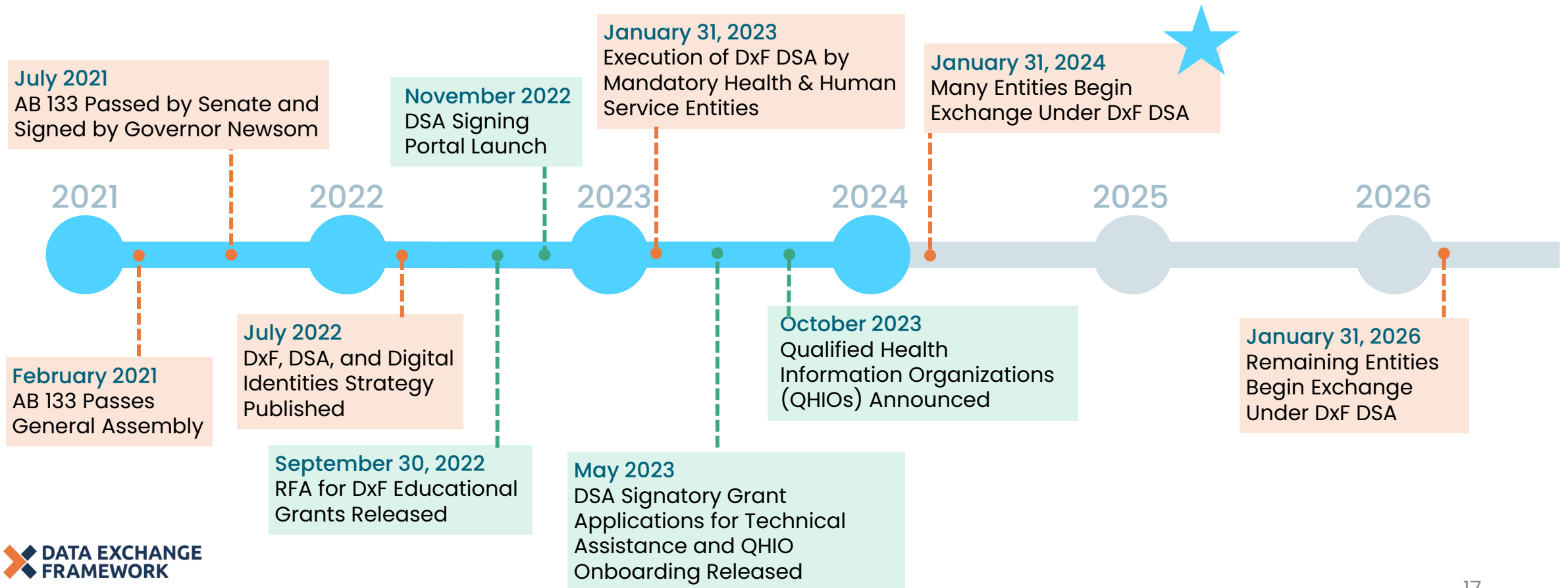
Meeting Objectives

- 1** Discuss implementation of the **Qualified Health Information Organization (QHIO) Program**
- 2** Provide update on **DSA Signatory Grants in 2024**
- 3** Review status of and next steps for **Policies and Procedures (P&Ps)**
- 4** Discuss implementation of the **DxF Participant Directory**

DxF Implementation Timeline

Past + Upcoming Milestones

Exchange under the DxF begins January 31, 2024



Signatory Count as of 01/15/2024

There are over 2,000 signed DSAs that represent ~3,000 different subordinate entities

Account Type (<i>Self-Attested</i>)	Signed DSAs*
Hospitals (General acute care settings and acute psychiatric settings)	252
Physician organizations and medical groups	1,583
SNFs (signed, assuming “with electronic record”)	545
Plans	68
Clinical Labs	113
County (or county affiliation)	60
Other (CBOs, HIOs, social services, other)	357
Total Account Type Count	2,978

* Subordinate level sub-totals; some figures have been approximated as CDII works with signatories on DSA line item clarification

The list of organizations that have signed the DSA is available [on the DxF webpage.](#)

Mandatory Signatories – Sign the DSA Immediately

Mandatory signatories were required to execute the DSA by January 31, 2023. We encourage those who have not yet signed the DSA to do so as soon as possible.

WHERE TO SIGN THE DSA



The screenshot shows the CalHHS Data Sharing Agreement Signing Portal. At the top left is the CalHHS logo and the text "CalHHS Data Sharing Agreement Signing Portal". Below this is a heading "Welcome to the CalHHS Data Sharing Agreement Signing Portal!". The main text reads: "Signing the Data Sharing Agreement is a critical next step toward full implementation of the Data Exchange Framework. It's time to ensure every Californian, no matter where they live, can trust that their health and social services providers can securely access critical patient information to provide safe, effective, whole person care." At the bottom, there is a section titled "Data Sharing Agreement" with a button that says "Register to Start".

WHERE TO FIND MORE INFORMATION

More information is available on the [CalHHS DxF webpage](#), including:

- Final DSA
- Draft & Final P&Ps
- FAQs on the DSA, P&Ps, and Signing Portal
- Historical Meeting Materials & Recordings
- List of DSA signatories

Contact CDII if your organization has questions or concerns about signing.

Qualified Health Information Organization (QHIO) Program Updates



QHIO Program Updates

Several QHIO Program elements are under development

Item and Description	Status
For DxF Participants	
<u>QHIO FAQs</u> : address Participants' most frequently asked questions.	<i>Completed</i>
<u>About the DxF QHIOs</u> : allows Participants to review key information regarding each of the QHIOs.	<i>In Development</i>
For QHIOs	
<u>QHIO Handbook</u> : a compilation of QHIO program requirements.	<i>In Development</i>

QHIO Program - Impact

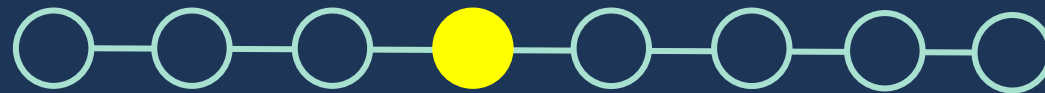
“The Qualified HIO Program’s designation process is intended to provide Participants with confidence in the organizational structure, service completeness, and technical and programmatic capabilities offered by Qualified HIOs in the event that such Participants choose to engage a Qualified HIO to comply with their obligations under the Data Sharing Agreement (“DSA”).” [excerpt from the [QHIO P&P](#)]

CDII is seeking input regarding:

- Recommendations on expectations of the QHIO Program?
- How to measure the impact of the QHIO Program as a contributor to the success of the DxF?



Update on Data Sharing Agreement (DSA) Signatory Grants



Summary of the DxF Grants Program

Over the past year, CDII has leveraged its \$50M allotment from the state legislature to fund three rounds DSA Signatory Grants, as well as a year of DxF educational programming and outreach through the Educational Initiative Grant Program.

DxF Grant Program	
Education Grants	\$3,000,000
Program Administration	\$3,500,000
DSA Sig Grants Round 1	\$1,500,000
DSA Sig Grants Round 2	\$7,000,000
DSA Sig Grants Round 3*	\$35,000,000
TOTAL	\$50,000,00

Dollar amounts are rounded

Thank You to the Educational Grantees !

CDII thanks the eight Educational Grantees, who reached thousands of organizations and DxF stakeholders through their outreach and education activities in 2023.

2023 DxF Educational Initiative Grantees

- American Academy of Pediatrics, California Chapter 1
- California Association of Health Plans
- California Council of Community Behavioral Health Agencies
- California Medical Association
- California Primary Care Association
- The County Health Executives Association of California
- LeadingAge California Foundation
- Multi-Association Initiative led by America's Physician Groups

The DxF Educational Initiative Grantees led a range of outreach and education activities throughout 2023, including:

- ~30 webinars
- 100+ newsletters
- Dozens of one-one-one coaching and compliance design sessions
- 20 conference-related events/activities

About DSA Signatory Grants

Applications for all rounds are now closed.
CDII is no longer accepting new DSA Signatory Grant Applications.

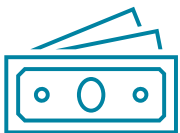
As part of the DxF Grant Program, CDII is administering **DSA Signatory Grants** that provide direct support to Signatories of the Data Sharing Agreement to subsidize their implementation efforts.



Purpose: DSA Signatory Grant funds will be used to implement a range of activities needed to achieve real-time data exchange in accordance with the DxF.



Eligibility: Organizations who have **signed the DSA** and demonstrate a DxF technology need were eligible for a DSA Signatory Grant.



Funding Amount: Applicants were able to request between \$15,000 and \$100,000, depending on organizational characteristics.



See the [DSA Signatory Grants Guidance Document](#) for details, including grantee required outcomes and progress reporting.



DSA Signatory Grants: Rounds By the Numbers

As of 1/19/2024, CDII has received funding requests from 806 Signatories totaling over \$43,000,000

	DSA Sig Grants Snapshot			
	Applicants	Signatories	% TA	% QHIO
Round 1 Awarded	19	25	56%	44%
Round 2 Awarded	106	121	61%	39%
Round 3 Requested*	414	660	58%	42%
Totals	539	806	58%	42%

DSA Signatory Grants: Looking Ahead

CDII and its partners will disperse funds over the next 2 years and bring updates on grant outcomes to future IAC meetings.

	2024												2025												2026			
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A
Grantees submit Progress Reports	rolling					◆			◆			◆			◆			◆			◆			◆			◆	
TPA issues payment	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ			Ⓢ		Ⓢ			Ⓢ			Ⓢ			Ⓢ			Ⓢ			Ⓢ	
TA R1 Awardees 8/14/23	Milestone 1 deadline								◐	Milestone 2 deadline								●										
TA R2 Awardees 9/30/23	Milestone 1 deadline									◐	Milestone 2 deadline									●								
QHIO R1 & R2 Awardees 10/23/23	Milestone 1 deadline										◐	Milestone 2 deadline										●						
Round 3 Est. 2/29/2024	○	Milestone 1 deadline										◐	Milestone 2 deadline										●					

Policies and Procedures (P&P) Development



P&P Status Summary

CDII is finalizing several P&Ps in anticipation of the start of exchange under the DSA.

Category	P&P Topic	Status	To Be Covered Today
Substantive Changes	Data Elements to Be Exchanged	Finalized and published	✓
Administrative Changes	Individual Access Services	Finalized and published	✓
	Permitted, Required, and Prohibited Purposes	Finalized and published	✓
	California Information Blocking Prohibitions	New Notification of Intended Administrative Changes	✓
New P&P	Participant Directory	Finalized and published	✓
	Fees	Finalized and published	✓

Finalized P&Ps

CDII has finalized and released five new or amended P&Ps since the December IAC and DSA P&P Subcommittee Joint Meeting. Final versions can be found on the [DxF webpage](#).

P&P Topic	Purpose
[New] Participant Directory	This P&P establishes obligations of Participants and CDII for providing, updating, storing, and communicating certain information concerning the network(s), health information organization(s), or technology(ies) Participants choose to use to Exchange Health and Social Services Information (HSSI).
[New] Fees	This P&P clarifies when Participants in the Data Exchange Framework may charge fees to other Participants and to Individuals.
Data Elements to Be Exchanged (amended)	This P&P establishes: (1) the data elements that Participants must make available to or exchange with other Participants, (2) the standards that must be used to represent that data, and (3) the formats that must be used when exchanging that data. <i>Note: This P&P has not undergone any changes since it was last reviewed by the IAC/DSA P&P Subcommittee on 12/19/23. It has since been published to the DxF webpage.</i>
Individual Access Services (amended – administrative modifications only)	This P&P establishes the responsibilities of Participants to enable the right of an Individual or an Individual’s Personal Representative to inspect and obtain a copy of HSSI about the Individual in a timely manner.
Permitted, Required, and Prohibited Purposes (amended – administrative modifications only)	This P&P establishes the purposes for which DxF Participants are required and/or permitted to exchange HSSI under the DxF.

Note: While a revised version of the CA Information Blocking Prohibitions P&P was published this month, an updated version is currently out for public input on intended administrative changes related to the HTI-1 Final Rule.

Participant Directory (1)

Finalized and published

Overview

Defines the Participant Directory, lists the minimum data included in the Participant Directory, defines who can access the Participant Directory and how, and establishes obligations for Participants to select choices for how they will provide Access to and Exchange of Health and Social Services Information in the Participant Directory.

Summary of Comments Received

- Received 48 comments from 10 organizations representing hospitals, plans, social services, intermediaries, and others
- Some comments suggested:
 - Clarifying who can access Participant Directory data and how, and specifying that the Participant Directory application used by Participants be secure
 - Allowing Participants to indicate that they can use multiple Intermediaries to Exchange HSSI, and can choose methods different than the parent organization signing the DSA
 - Clarifying that use of choices identified by Participants in the Participant Directory is not required for DxF compliance
 - Allowing Participants to delegate their obligations to select choices to a QHIO or other organization
 - Including APIs to access and update the Participant Directory
 - Only identifying voluntary signatories that terminate the DSA after 1/31/2024
 - Removing unnecessary/inaccurate language on descriptions of Information Delivery and Requests for Notifications

Participant Directory (2)

Finalized and published

Summary of Changes

- As suggested in comments, the finalized P&P includes:
 - Clarification that the Participant Directory data is available publicly on the CDII DxF webpage, but that only Participants can access the application and select choices for Exchanging HSSI
 - Specification of the minimum-security requirements for the Participant Directory application used by Participants as a web-based application
 - Additional language to require signatories to maintain names and choices for all subordinates, and ensure subordinate organizations can make choices different than their parent signatory organizations and sibling subordinates
 - Clarification that voluntary signatories that terminate the DSA are only included if terminating after 1/31/2024
 - Additional language clarifying that Participants may use methods other than the choices identified in the Participant Directory to meet their obligations to Exchange HSSI under the DxF, and some types of Exchange may not be applicable
 - Removal of unnecessary/inaccurate language on descriptions of Information Delivery and Requests for Notifications
- The Participant Directory P&P also established the following definitions that will be added to the Glossary of Defined Terms:
 - Participant Directory
 - Point-to-Point Interfaces

An update on the DxF Participant Directory will be provided in the subsequent meeting section.

Fees (1)

Finalized and published

Overview

Clarifies when Participants in the Data Exchange Framework may charge fees to other Participants and to Individuals for the exchange of data.

Summary of Comments Received

- Received 13 comments from five organizations representing providers, plans, social services, and others
- Some comments suggested:
 - Fees should not be cost prohibitive to DxF participation
 - Participants should not be permitted to impose fees on individuals in furtherance of individual access except where required by applicable law

Fees (2)

Finalized and published

Summary of Changes

Finalized P&P will include the following changes:

- Require that any fees charged by one Participant to another Participant for the Exchange of Health and Social Services Information for a Permitted Purpose must be reasonable.
- Require that, unless required by Applicable Law, a Participant shall not charge fees to an Individual for Individual Access Services that are provided via computer-to-computer Exchange that makes electronic Health and Social Services Information available pursuant to a request for Health and Social Services Information and does not require any transfer of electronic storage media such as optical disks or USB flash drives.

Notice of Intended Administrative Changes

California Information Blocking Prohibitions

CDII is proposing to make administrative changes to the California Information Blocking Prohibition P&P. *CDII will accept objections to CDII's characterization of these changes as administrative through February 19, 2024, at 8am.*



- ❖ CDII is revising the California Information Blocking Prohibitions P&P to align the P&P with the federal Final Rule on Health Data, Technology, and Interoperability: Certification Program Updates, Algorithm Transparency, and Information Sharing that was published on January 9, 2024. These revisions should not result in any change to the meaning of the P&P, or to CDII's expectations for Participants, and are otherwise not considered to be substantive.
- ❖ CDII is seeking public comment only with respect to these administrative modifications through a simplified process.
- ❖ Participants that object to CDII's determination that these changes are administrative may submit an objection for the applicable P&P through an online form available on the DxF webpage. Objections are due by 8am PT on February 19, 2024.

Please see Section III.5. of the Development of and Modification to Policies and Procedures P&P for more information on the Administrative Modification Process.

Participant Directory Updates



Participant Directory



What is the Participant Directory?

New fields in the DSA signing portal and new columns in the list of DSA signatories that inform Participants of the choices other Participants have made in how they Exchange HSSI under the DxF.



Who enters choices into the Participant Directory?

All Participants. QHIOs and other Intermediaries may advise or assist Participants, but Participants are responsible for their own choices. Participants beginning exchange in 2026 need not enter exchange choices until starting to Exchange HSSI under the DxF.



What choices need 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)

Participant Directory (1/7)

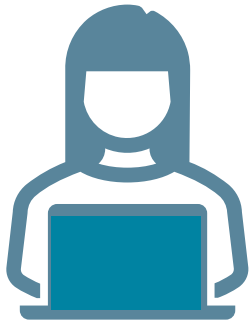
What data is included in the Participant Directory listing?



- Name of the Participant (both parent signatories and subordinate orgs)
- Unique identifier for the Participant assigned by the Participant Directory
- Whether an eligible Participant is electing to delay Exchanging HSSI under the DxF until January 31, 2026, as allowed under HSC § 130290(b)(2) and the Requirement to Exchange HSSI P&P
- Intermediaries or technologies the Participant has chosen for:
 - Submitting a Request for Information
 - Receiving Information Delivery
 - Submitting a request for Notification of ADT Events
- Technical contact information if a Participant chooses to use their own technology
- Whether a voluntary signatory has terminated the DSA as allowed under Section 15(b) of the DSA
- Whether the Participant will/has ceased operations and when

Participant Directory (2/7)

Who must indicate their choices in the Participant Directory?



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 “NA” if the Participant Maintains no HSSI).
- Participants that wish to receive HSSI must indicate an exchange choice for Information Delivery (optional for all Participants)
- Participants that are Hospitals or Emergency Departments must indicate an exchange choice for requests for Notification of ADT Events
 - 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 (3/7)

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 exchanging HSSI under the DxF until January 31, 2026.

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
- Their own technology via point-to-point interfaces
- “Not Applicable” if the exchange type is optional for their organization type or the organization Maintains no HSSI
- “Other” if they are using an Intermediary not yet listed as an exchange choice in the Participant Directory application

Participant Directory (4/7)

How will the Participant Directory work?

How Participants indicate their choices:
New fields in the DSA signing portal

I chose to exercise my option to delay exchange under the DxF until January 31, 2026

I choose to receive Requests for Information via the following method:
 QHIO B ▼

I choose to receive Information Delivery via the following method:
 ▼

I choose to receive r Notifications via the following method:
 ▼

QHIO A
 QHIO B
 ...
 Network X
 Framework Y
 ...
 Intermediary M
 ...
 Not Applicable
 Self
 Other

How Participants learn the choices of other Participants:
New columns in the listing of DSA signatories

Participant ID	Participant Name	Delay until 2026	Request for Info	Info Delivery	Request for Notifications	Terminated DSA	Ceasing Ops
100001	Hospital A	No	Network X	Network X	QHIO B	No	No
100002	Clinic B	Yes	None	None	None	No	No
100003	Plan C	No	QHIO A	NA	NA	No	No

The choices Participants make

Participant Directory (5/7)

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 must also enter:

- A URL at which to find more information on how to establish the connection; 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 (6/7)

Other data in the Participant Directory



The Participant Directory listing will also indicate Participants that:

- Are voluntary signatories that have terminated the DSA and the effective date of termination (if after January 31, 2024)

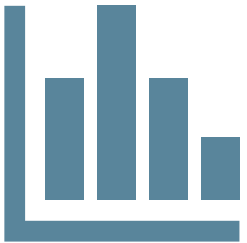
Voluntary signatories to the DSA that wish to terminate the DSA must contact CDII as required in Section 15(b) of the DSA.

- Have or will be ceasing operations and the effective date that operations ceased or will cease

Participants (signatories or subordinate organizations) that will be ceasing operations must contact CDII as required by the Participant Directory P&P.

Participant Directory (7/7)

Other benefits of the Participant Directory



In addition to informing Participants of the exchange choices other Participants have made in how to provide Access to and Exchange HSSI, the Participant Directory may provide:

- A better picture of the subordinate entities of signatories to the DSA that are participating in data sharing
- An environmental scan of how organizations in California are sharing data and for what purposes
 - Who is using nationwide networks and frameworks
 - Who is using HIOs and other Intermediaries
- How many organizations are taking advantage of optional exchange types
 - Perhaps some insight into how much information is exchanged through push rather than pull

Public Comment



Next Steps and Closing Remarks



Next Steps

CalHHS will:

- Consider the feedback provided by the IAC and DSA P&P Subcommittee.
- Continue to advance P&P and QHIO materials in development and, where applicable, solicit public comment.
- Establish and launch the Technical Advisory Subcommittee (TASC).

Members will:

- Provide any additional feedback to CDII at dxf@chhs.ca.gov or CDII@chhs.ca.gov

Upcoming Meetings

IAC Meetings	Date
IAC Meeting #14	March 19, 2024, 12:00 PM – 2:30 PM
IAC Meeting #15	May 22, 2024, 12:00 PM – 2:30 PM
IAC Meeting #16	July 11, 2024, 12:30 PM – 3:00 PM
IAC Meeting #17	August 29, 2024, 11:00 AM – 1:30 PM
IAC Meeting #18	November 7, 2024, 12:30 PM – 3:00 PM

*Note: DSA P&P Subcommittee meetings for 2024 are currently being scheduled. Meeting information will be soon be posted to the DxF website.

For more information on additional DxF Program Events, such as Grants Program Office Hours please reference the respective section on the [DxF Webpage](#).

Appendix
DxF Advisory
Committees in 2024

DxF Advisory Committees in 2024

Implementation Advisory Committee

CDII will continue to convene the IAC in 2024 to engage public and private stakeholders in the design and implementation of the statewide DxF.



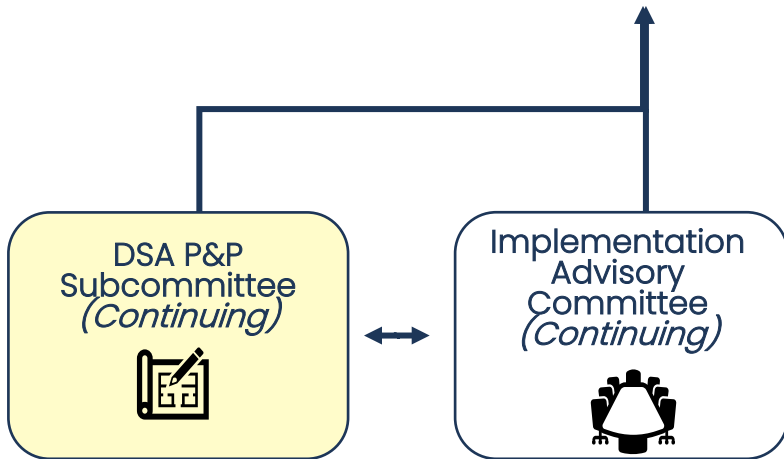
Implementation Advisory Committee (Continuing)

- **Scope:** The IAC is a chartered, multi-stakeholder advisory body that advises CDII in all aspects of DxF implementation.
- **Cadence:** IAC meetings will transition to occur at a bi-monthly interval, spaced approximately every 8 weeks.
- **Membership:** Comprised of a broad range of public and private health care leaders and experts. No significant changes to the IAC's general composition, though some members have rotated on/off of the committee.

DxF Advisory Committees in 2024

Data Sharing Agreement (DSA) Policies and Procedures (P&P) Subcommittee

CDII will continue to convene the DSA P&P Subcommittee to advise CDII on the development of and modifications to DSA P&Ps.



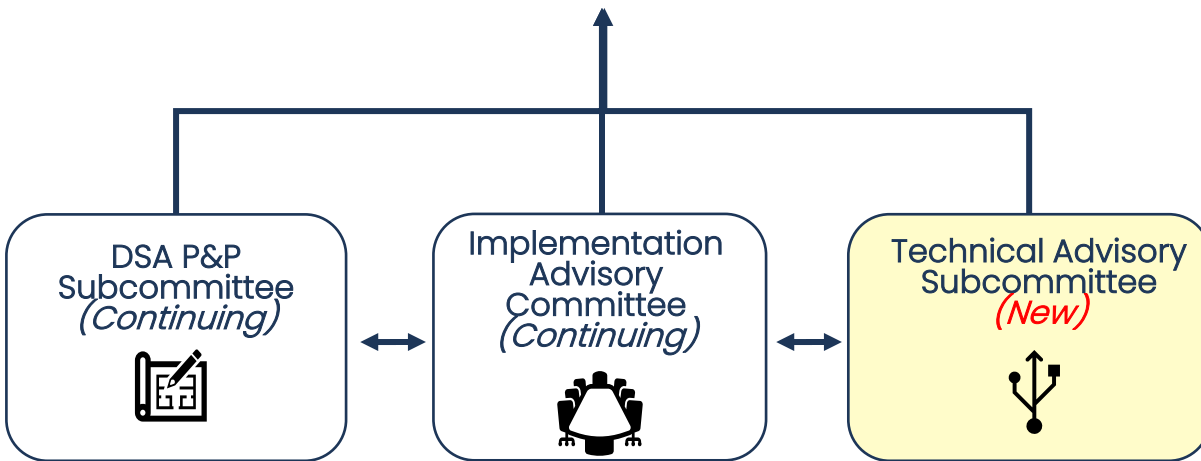
DSA P&P Subcommittee (Continuing)

- **Scope:** Serve as the primary body advising CDII in the development of, and modifications to, the DSA and its associated P&Ps. Some P&P topics requiring significant and specialized technical expertise may be socialized with the Technical Advisory Subcommittee on a limited basis.
- **Cadence:** DSA P&P SC meetings will transition to occur at a bi-monthly interval, spaced approximately every 8 weeks.
- **Membership:** Comprised of a diverse set of public and private stakeholders with legal, technical, and operational expertise. No significant changes to the DSA P&P Subcommittee's general composition, though some members have rotated on/off the committee.

DxF Advisory Committees in 2024

Technical Advisory Subcommittee (TASC)

CDII is establishing a new subcommittee to advise CDII on DxF Implementation topics requiring significant and/or specialized technical and operational expertise.



Technical Advisory Subcommittee

- **Scope:** Advise CDII on DxF implementation topics requiring significant and/or specialized technical and operational expertise. Advise on incorporation of new technical standards into DxF requirements and provide ad hoc support on other technical and implementation priorities (e.g., ADT architecture, FHIR implementation).
- **Cadence:** Multi-stakeholder advisory body with expected commitment of one year. Meetings will be held on an ad hoc basis, as needs are confirmed (likely 10-15 hours of meetings throughout the year).
- **Membership:** Comprised of technical or operational experts (e.g., with knowledge in technical specifications and exchange standards). Membership will be fluid and subject matter experts may be onboarded as need for specific technical expertise is identified.