



# Data Exchange Framework

## DxF DSA Signatory Grantee Webinar

**February 29, 2024**

*11:00 AM – 12:00 PM PT*



# Speaker Introductions

## DeeAnne McCallin

Deputy Director,  
Data Exchange Framework,  
CDII

## Khousa Vang

Grants Program manager,  
Data Exchange Framework,  
CDII

## Mark Noyes

DxF Grant Lead,  
Public Consulting Group  
(Third Party Administrator)

# Agenda



- Learning Objectives
- DSA Signatory Grants Background
- Grant Agreements and Progress Reports
- DxF Grants Portal 101
- Wrap Up and Q&A

# Learning Objectives



# Learning Objectives:

After today's webinar, all Grantees should be able to:



- Articulate their progress reporting requirements;
- Comprehend expectations for Milestone's 1 and 2; and
- Know how to access their grant dollars  
(*applicable only for TA Grantees*).

# Q&A Procedure

- Participants may submit comments and questions through the Zoom Q&A function; all comments will be recorded and reviewed by CDII staff.
- CDII will select questions to be answered live during the webinar as time allows.
- If your question was not answered during the session and you would like to follow up with CDII, please submit your question to:
  - [dxf@chhs.ca.gov](mailto:dxf@chhs.ca.gov)

# DSA Signatory Grants Background



# About DSA Signatory Grants

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

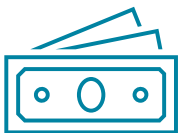
As part of the DxF Grant Program, CDII is administering **DSA Signatory Grants** that provide direct support to Signatories of the Data Sharing Agreement to subsidize their implementation efforts.



**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 demonstrated 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 **UPDATED** [DSA Signatory Grants Guidance](#) Document for details, including Grantee required outcomes and progress reporting.





# How can Signatories use funding?

Permissible and impermissible uses vary by grant type.



## Qualified Health Information Organization (QHIO) Onboarding Grant

QHIO Onboarding Grantees will work with their selected QHIO to determine how funds will be used to complete onboarding.

- ✓ Offset QHIO Onboarding costs
- ✓ Offset Signatory Onboarding costs
- ✗ Ongoing HIE costs
- ✗ Purchasing new EHR technology
- ✗ Onboarding to a non-qualified HIO
- ✗ Changing from one QHIO to another



## Technical Assistance (TA) Grants

TA Grantees must demonstrate how proposed funding will help them meet DSA requirements.

- ✓ Identifying/contracting with a technology vendor
- ✓ Onboarding costs to implement a technology solution that establishes real-time data exchange
- ✓ Adjusting, upgrading, or adopting an EHR
- ✓ Creating/providing training on workflows/processes
- ✗ Recurring costs for a HIO, EHR, or other health IT system

# Grant Agreements and Progress Reports



# Grant Program Acknowledgement

Once awarded, each Applicant must sign a Grant Program Acknowledgement with CDII to officially be considered a Grantee.



## What is a Grant Program Acknowledgement (GPA)?

- A GPA will specify the Grant Terms and Conditions and Milestones that the Grantee must reach in order to receive their total grant award.
- Each GPA will have two Milestones, and the total grant award will be disbursed evenly across the two Milestones.

# QHIO Onboarding Grant Milestones

**QHIO Onboarding Grantees and the selected QHIO will be required to show that they have successfully onboarded to the QHIO and have achieved a real-time data transaction through the QHIO.**

## For Umbrella Grants

**If the Grantee represents multiple DSA signatories, ALL attestations must be co-signed by every DSA Signatory included under the grant, the Grantee, and the QHIO.**

Milestone	Required Milestone Documents	Details
<b>Milestone 1</b>	1. Attestation	<ul style="list-style-type: none"> <li>Attestation cosigned by QHIO and the Grantee confirming that a contract, contract amendment has been signed               <ul style="list-style-type: none"> <li><i>A contract amendment may be, but is not limited to, a revision to a contract, a new agreement that supplements a legacy contract, or an addendum to a contract.</i></li> </ul> </li> </ul>
<b>Milestone 2</b>	1. Attestation 2. Proof of Real Time Data Exchange for Each Instance	<ul style="list-style-type: none"> <li>Attestation co-signed by QHIO and the Grantee stating that onboarding has been completed; and</li> <li>Documentation (e.g., screenshot in non-test environment) that data exchange transaction has occurred for each Instance on the grant.</li> </ul>

# Technical Assistance Grant Milestones

**TA Grantees will be required to show that they have successfully achieved their required outcome(s).**

## For Umbrella Grants

**If the Grantee represents multiple DSA signatories, ALL attestations must be co-signed by every DSA Signatory included under the grant, as well as the Grantee.**

Milestone	Required Milestone Documents	Details from the Guidance Document
<b>Milestone 1</b>	1. Attestation	<ul style="list-style-type: none"> <li>Attestation signed by Grantee confirming a contract for HIT vendors, external personnel, and/or other external/internal Resources have been procured accounting for at least 50% of the grant budget.</li> </ul>
<b>Milestone 2</b>	1. Attestation 2. Required documentation demonstrating the Grantee's identified Outcome(s).	<ul style="list-style-type: none"> <li>The attestation co-signed by the Grantee stating that TA Milestone 2 outcome(s) have been completed; and</li> <li>Relevant supporting documentation as it relates to the Grantee's chosen Outcome(s), provided for all DSA Signatories included in the grant.</li> </ul>

# Demonstrations of TA Milestone Achievement

The Milestones for the TA Grant will depend on the selected Outcome(s) of the grant and the Resources that the Grantee identified in their Application



Applicant has identified funding uses for their TA Grant.

-----> **Milestone 1**

-----> **Milestone 2**

Grant Outcomes	Documentation Demonstrating a Procured Resource	Required Documentation for Milestone 2*
1. <b>Identifying and Contracting with a Technology Solution.</b>	Attestation that a contract for HIT vendors, external personnel, and/or other external/internal resources have been procured.	<ul style="list-style-type: none"> <li>Contract with HIT vendor; or</li> <li>Copy of completed technology solutions assessment</li> </ul>
2. <b>Implementing a Technology Solution Capable of Supporting Real-Time Data Exchange</b>		<ul style="list-style-type: none"> <li>Screenshot of test demonstrating a real-time data exchange transaction; or</li> <li>Final invoice or attestation signed by vendor demonstrating completion of technology implementation</li> </ul>
3. <b>Adjusting, Upgrading, or Adopting a Certified EHR or Other Electronic Documentation System</b>		<ul style="list-style-type: none"> <li>Final invoice or attestation signed by EHR/electronic record system vendor demonstrating completion of adjustments, upgrades, or adoption</li> </ul>
4. <b>Creating and Providing Training for New Workflows</b>		<ul style="list-style-type: none"> <li>Copy of training and/or technical assistance materials</li> </ul>

# Progress Reports for TA and QHIO Grantees



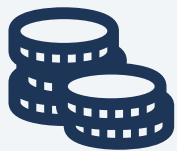
TA and QHIO Grantees must attest to milestone completion through the submission of their **Progress Reports**.



TA Grant Progress Reports  
Submitted by Grantee.

QHIO Onboarding Grant Progress  
Reports Submitted by QHIO.

*If a Progress Report indicates a Milestone has been met and is properly documented, PCG will disburse 50% of the awarded grant dollars.*



Grant funds go directly to the  
TA Grantee.

Grant funds go directly to the  
Grantee's chosen QHIO.

# Progress Reports

**Until a Grantee achieves Milestone 2, a Grantee must submit Progress Reports to PCG by the due date, quarterly, regardless of whether they have achieved a milestone.**

Each Progress Report collects one or more of the following pieces of information:

- Demonstration of a Milestone completion;
- Brief update on ongoing work to achieve Milestone completion;
- Reason for reaching the 12- or 24-month mark without achieving Milestone 1 or 2, respectively; and/or
- A change request for the TA Grant (only needed if Grantee will not achieve the Outcome(s) listed in their Application).

Organization Name

Progress Report Submitter\* Contact Number\*

Contact Email\*

Grantees have 12 months from the time of their award to reach Milestone 1, and 24 months from the time of their award to reach Milestone 2. Grantees that do not achieve Milestones in those timeframes may forfeit their grant award. Until Milestone 2 is achieved, Grantees will need to submit Progress Reports each quarter, beginning in 2024. Refer to the DSA Signatory Grants Applicant Guidance Document for further details.

Please provide your progress updates for Milestone 1 and Milestone 2 below.

Milestone 1 Due: 08/14/2024

Milestone 2 Due: 08/14/2025

Milestone 1

*Progress Report on the DxF Grants Portal*



# TA Outcome Change Request

**TA Grantees may discover mid-implementation that they need to re-prioritize their investments to achieve their DSA requirements.**

- If you will no longer be able to achieve outcome(s) identified in your application, you can submit a change request through the Progress Report to request an alternate Outcome.
- **Outcome Change Requests Requirements:**
  - Explain reason for change
  - Demonstrate that you will still achieve one of the required Outcomes of a TA Grant.
- PCG and CDII will review all requests and provide a response to the Grantee within 30 days of the Progress Report submission.

If you are still able to achieve the same or comparable Outcome(s) as those identified in your application, you may adjust how funding is spent on Resources without submitting a Change Request to CDII and PCG.

CDII and PCG reserve the right to adjust grant award amounts based on significant changes in Outcomes.

# Who Signs the Progress Reports?

**Until a Grantee achieves Milestone 2, a Grantee must submit Progress Reports to PCG by each quarterly due date, regardless of whether they have met a milestone.**

Type of Progress Report	QHIO Grantee	TA Grantee
Progress Report for <b>Non-Milestones*</b>	<ul style="list-style-type: none"> <li>QHIO Only</li> </ul>	<ul style="list-style-type: none"> <li>TA Grantee</li> </ul>
Progress Report for <b>ANY Milestone</b>	<ul style="list-style-type: none"> <li>QHIO</li> <li>Grantee</li> </ul>	<ul style="list-style-type: none"> <li>TA Grantee</li> </ul>

## *Umbrella Grantee Considerations*

**Umbrella Grantees representing multiple DSA signatories do not need co-signed documents for Non-Milestone progress reports.**

**Umbrella Grantees representing multiple DSA signatories must have co-signed documents for Milestone progress reports.**

# 2024 Progress Reports: Due Dates

## Optional Early Reporting 2024 Progress Reports

*for Expedited Funding*

### Rolling Progress Reports

- January 1, 2024 - May 31, 2024

*Intended for Grantees who have achieved a Milestone.*



Funds will be disbursed by the end of the subsequent month for which a progress report was submitted.

## Required 2024 Progress Reports

### 2024 Progress Report Due Dates:

- June 30, 2024\*
- September 30, 2024
- December 31, 2024

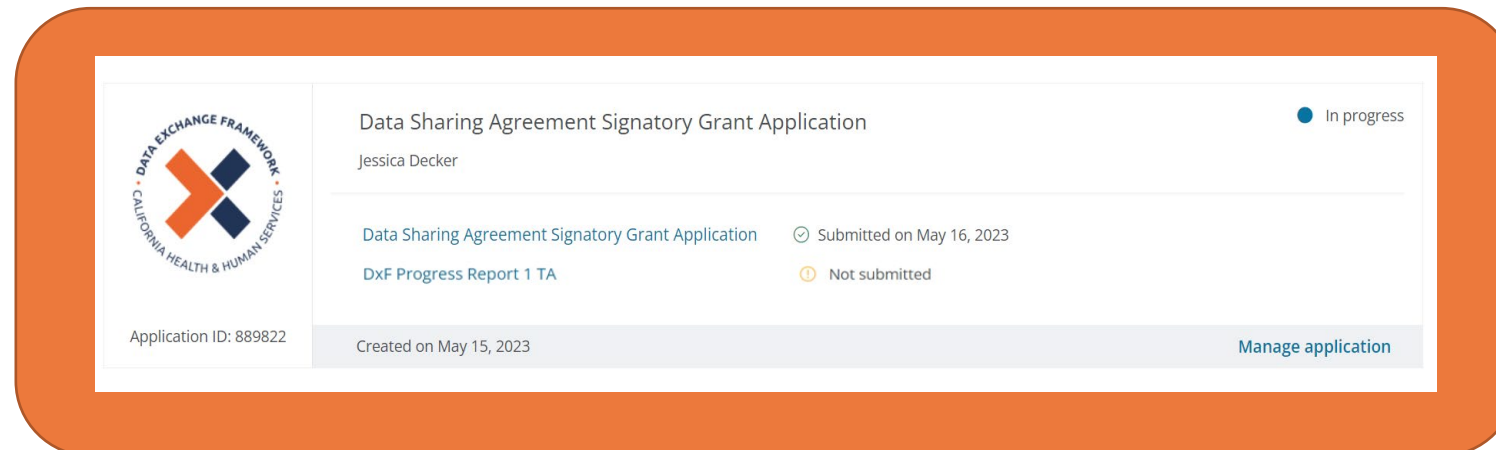
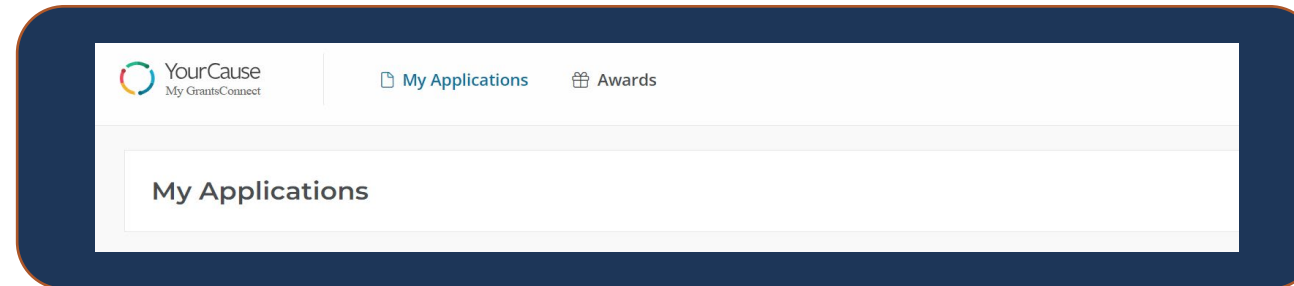


Fund disbursement for any Milestones achieved will be within 30 days of that specific Progress Report's due date.

\* Progress reports submitted in April and May of 2024 for expedited funding will be accepted for the required June 2024 progress report due to recently informing CDII of their progress and do not need to submit another progress report.

# Where can I submit my Progress Reports? (1/2)

- To submit a Progress Report, log into the DxF Grant Portal just as you did for the application
  - [YourCause - Grants Portal \(yourcausegrants.com\)](https://yourcausegrants.com)
- You'll see "My Applications" including your approved Data Sharing Agreement Signatory Grant Application, as well as the Progress Report form.



# Where can I submit my Progress Reports? (2/2)

- Once you have the progress report open, you can navigate to other documents by going to the navigation pane titled “Application Forms” on the far-left corner of the screen.

The screenshot shows the 'DxF Progress Report 1 TA' form in the YourCause My GrantsConnect portal. The interface includes a top navigation bar with 'Applications' and 'Awards' tabs, and a user profile for Jessica Decker. The main content area is divided into three sections: 'Applicant Information', 'FORM QUESTIONS', and 'Application Forms' (navigation pane).

**Applicant Information:** This section lists two applicants: Jessica Decker (JD) and Mark Noyes (MN). Jessica Decker's details include 148 State St 10th floor, Boston, MA 02109, US, and email jdecker@pcgus.com. Mark Noyes' details include 148 State St 10th Floor Boston, MA, 02109, US, and email mnoyes@pcgus.com. A 'Manage applicants (2)' link is visible.

**FORM QUESTIONS:** This section contains a form with the following fields:

- Organization Name: Test org
- Progress Report Submitter\* (required)
- Contact Number\* (required)
- Contact Email\* (required)

A 'Download' link is present in the top right of this section.

**Application Forms (Navigation Pane):** This pane lists several application forms with their submission status:

- Data Sharing Agreement Signatory Grant Application (Submitted on Aug 14, 2023)
- CDII DxF Grant Program Acknowledgement QHIO (Submitted on Aug 14, 2023)
- CDII DxF Grant Program Acknowledgement TA (Not submitted on Aug 14, 2023)
- CDII DxF Grant Program Acknowledgement QHIO Round 2 (Not submitted on Aug 14, 2023)

# Questions about Progress Reports on the DxF Grants Portal?


Contact [DSAGrants@pcgus.com](mailto:DSAGrants@pcgus.com) or call (866) 698-6525

Application IDs may be needed to help address your question.

You can find your Application ID numbers under **My Applications**.

**My Applications**

Search by application ID 1 status selected

 **Data Sharing Agreement Signatory Grant Application** Approved  
Jessica Decker

Data Sharing Agreement Signatory Grant Application	Submitted on Aug 14, 2023
CDII DXF Grant Program Acknowledgement QHIO	Submitted on Aug 14, 2023
CDII DXF Grant Program Acknowledgement TA	Not submitted
CDII DXF Grant Program Acknowledgement QHIO Round 2	Not submitted
CDII DXF Grant Program Acknowledgement TA Round 2	Not submitted
DxF Progress Report 1 TA	Not submitted

Application ID: 998753

Created on Aug 14, 2023 Manage

# DSA Signatory Grants: Progress Report Dates

After the optional early reporting period, Grantees must submit progress reports at the end of every quarter.

	2024								2025								2026												
	Jan-May: Optional Early Reporting					J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	
<b>Grantees submit Progress Reports</b>	rolling					◇	◇*		◇			◇			◇			◇			◇			◇			◇		
<b>PCG issues payment</b>	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ	Ⓢ		Ⓢ			Ⓢ			Ⓢ			Ⓢ			Ⓢ			Ⓢ			Ⓢ		

\* Progress reports submitted in April and May of 2024 for expedited funding will be accepted for the required June 2024 progress report due to recently informing CDII of their progress and do not need to submit another progress report.

Reminder: Payments will only be issued if a Milestone has been met.

# DSA Signatory Grants: Milestone Due Dates

**Grantees must indicate that they have achieved Milestone 1 and Milestone 2 before their respective deadlines.**

Award Notification Dates	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							
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												●														
TA & QHIO R3 Awardees 2/23/2024		○	Milestone 1 deadline							◐	Milestone 2 deadline												●												



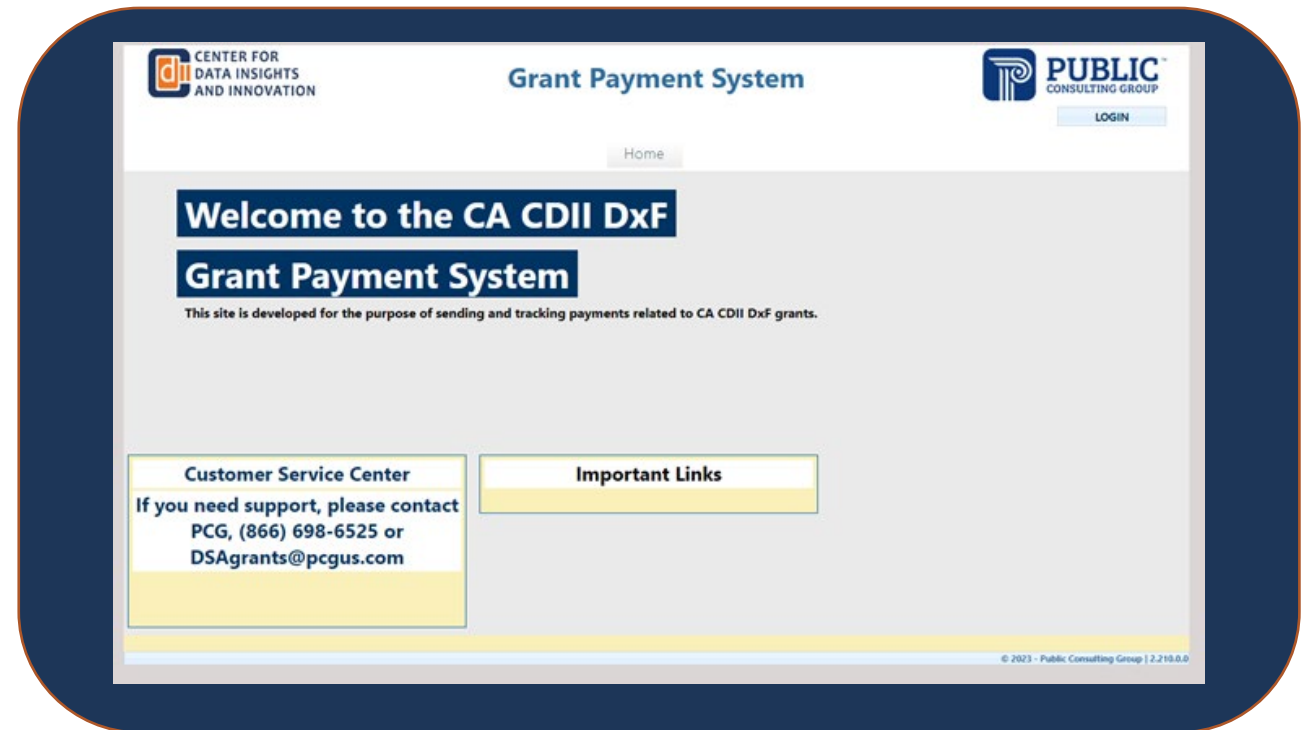
# **DxF Grant Portal 101**

*Banking Information, Accessing Funds, and Navigating the Portal*



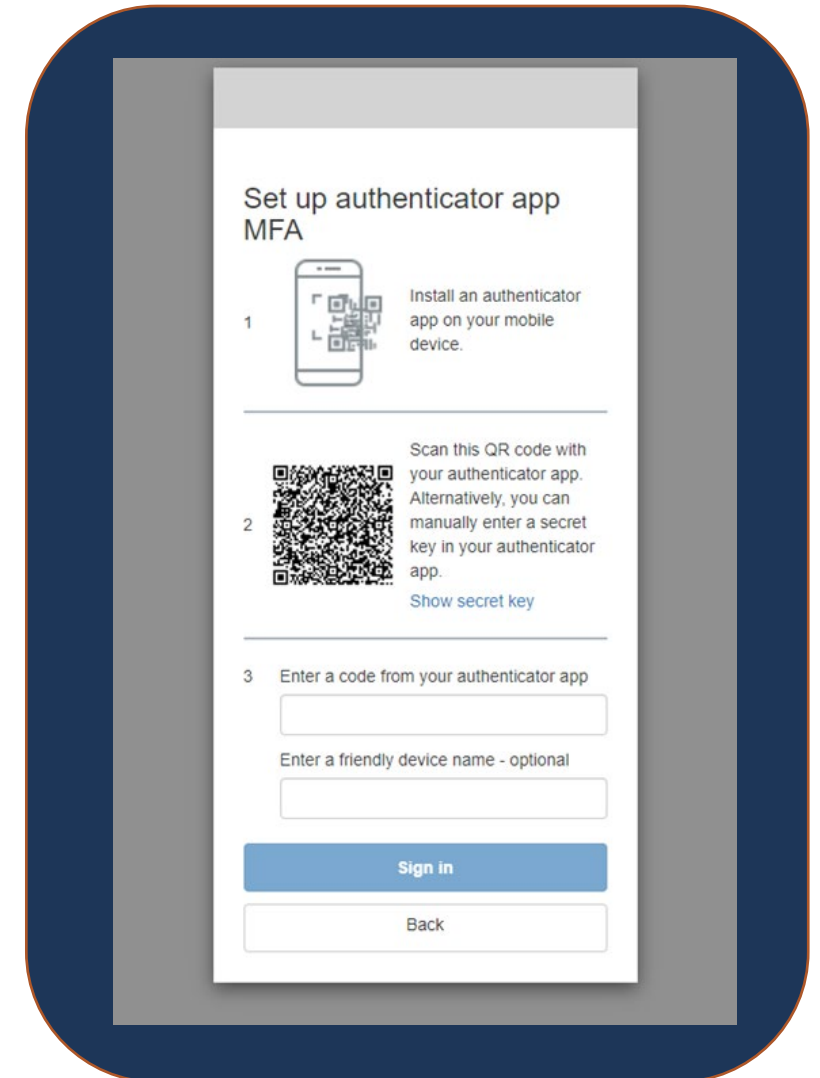
# Banking Information: PCG's Billing and Claiming System

- The **Billing and Claiming (BAC) system** is PCG's banking account portal that is used one-time to collect your W-9 and banking information so that grant disbursements can be made to Grantees seamlessly.
- Grantees will receive an introductory email guiding them through this process
- Please be sure to check your Spam folder for the introductory email





# How do I get my banking info to BAC? (1/2)

- **Step 1:** Locate email from HUSData@pcgus.com with Subject: Your Grant Payment System Account Details and click on the link
- **Step 2:** BAC uses Multi Factor Authentication (MFA) to secure your banking information. You will need to choose an Authenticator App (by phone is best)
- **Step 3:** Scan the QR Code and follow the prompts to login successfully
- **Step 4:** Review and complete your profile
- **Step 5:** Load your W-9, and banking information



Set up authenticator app  
MFA

- 1  Install an authenticator app on your mobile device.
- 2  Scan this QR code with your authenticator app. Alternatively, you can manually enter a secret key in your authenticator app. [Show secret key](#)
- 3 Enter a code from your authenticator app  
  
Enter a friendly device name - optional

[Sign in](#)  
[Back](#)

# How do I get my banking info to BAC? (2/2)

- BAC requires information on just a few screens so this can usually be completed in less than 20 minutes.

**Business - Profile**  
Provider profile successfully updated!

**General Information** | **ACH Information**

Business Name: \_\_\_\_\_ Business Website: \_\_\_\_\_ Doing Business As (DBA): \_\_\_\_\_  
Org 1: \_\_\_\_\_  
First Name: Juliette Middle Initial: \_\_\_\_\_ Last Name: Mullin  
ACH: \_\_\_\_\_  
**Please enter bank account information under the Payment Information tab.**  
FEIN/Federal ID: \_\_\_\_\_

**Address**

Address 1: 123 Main Street Address 2: \_\_\_\_\_  
City: Los Angeles State: California Zip: 12345  
Country: United States

**Supporting Documentation**

No registration documents found.

Valid files: Any  
Completed IRS Form W-9  No file chosen

**Grant Payment System** | PUBLIC CONSULTING GROUP

Vendor Super User

Home Maintenance Reports

**EFT Setup Request**

Complete the following fields and click submit, located on the bottom of the screen.

Routing Number: \_\_\_\_\_ Confirm Routing Number: \_\_\_\_\_  
Account Number: \_\_\_\_\_ Confirm Account Number: \_\_\_\_\_  
Account Description: \_\_\_\_\_

**SAMPLE CHECK**

DATE: \_\_\_\_\_

PAY TO THE ORDER OF: \_\_\_\_\_ DOLLARS

MEMO: \_\_\_\_\_ SIGNATURE: \_\_\_\_\_  
286582805 0123456789 0101

ROUTING NUMBER ACCOUNT NUMBER

© 2023 - Public Consulting Group | 2.218.0.0

# Accessing Funds & Documentation

## How can I receive the funds?

- Electronic Fund Transfer

## When will I receive the funds?

- Funds will be dispersed by the end of the month following the Progress Report due date if a Milestone was met and approved by CDII
- PCG will send the Grantee an email once the payment has been processed
  - Payment should be received within 3-4 business days from email notification.

## When and how will I get tax documentation?

- PCG will mail a 1099 to all TA Grantees and QHIOs on behalf of QHIO Grants by the end of January for payments made in the prior calendar year.

# For Questions about Progress Reports on the DxF Grants Portal

Contact [DSAGrants@pcgus.com](mailto:DSAGrants@pcgus.com) or call (866) 698-6525

# **DxF Grants Portal Demo**

# Wrap-up & Q&A





# Question & Answer



# Additional Grant Program Questions?

- **For questions about your grant or the DxF Grants Portal,**

Contact [DSAGrants@pcgus.com](mailto:DSAGrants@pcgus.com) or call (866) 698-6525

- **For questions about the DxF,**

Contact [DxF@chhs.ca.gov](mailto:DxF@chhs.ca.gov) or [CDII@chhs.ca.gov](mailto:CDII@chhs.ca.gov)

- **Also be sure to check out:**

[DxF Grant Portal](#)

[DxF Homepage](#)

[DxF FAQ](#)

[DSA Signatory Grant Application Guidance](#)

# Upcoming DSA Signatory Grantee Office Hours

***Join us at a future office hour:***

- **Office Hours 1:**

Wednesday, March 27th  
12:00 to 1:00pm PT

- **Office Hours 2:**

Thursday May 2nd  
11:00am to 12:00pm PT


*Grantees will receive invites and registration links to all future office hours.*

**Future  
Quarterly  
Office Hours**

*Grantees can expect one office hour quarterly throughout the life of the grant where they can seek ongoing support related to their progress reports and milestones.*

# DxF Weekly Update

**CDII sends the “DxF Weekly Update” to subscribers interested in receiving weekly updates about the DxF.**



**DxF Weekly Update**

*The Center for Data Insight and Innovation (CDII) is providing this weekly communication to provide important updates and information on the Data Exchange Framework (DxF).*

**Important Notices**

On Friday, September 22, 2023, CDII provided public notice of intended administrative modifications to the [Individual Access Services P&P](#). Refer to the “Notice of Intended Administrative Changes to P&Ps (September 2023)” section of [CDII’s DxF Webpage](#). Deadline to respond is **October 23, 2023**. See [Public Comment](#) section below.

**DxF Updates**

**POLICIES & PROCEDURES:**

- The Requirement to Exchange Health and Social Services Information P&P and the Privacy Standards and Security Safeguards P&P are being reviewed by CDII post the recent public comment window. Materials and public comments received by CDII for these two P&Ps can be found in [the Public comment \(August 2023\) section of Archived Materials](#).

**QHIO PROGRAM:**

- CDII is reviewing applications and anticipates announcing which organizations have been qualified in October 2023.
- Information on the QHIO program can be read in the [QHIO P&P](#).

**DSA SIGNATORY GRANTS:**

**Join the mailing list by emailing [dxfc@chhs.ca.gov](mailto:dxfc@chhs.ca.gov) or [cdii@chhs.ca.gov](mailto:cdii@chhs.ca.gov)**

*DxF Weekly Update – Week of October 3, 2023*



# Appendix

# Progress Reports Dates

Year	Progress Report Due Date	Estimated Payment Date for Reports Attesting to a Milestone
<b>2024</b>	<i>Grantees who have achieved Milestone 1 have the option to submit their first progress report at any time between January 1, 2024, to May 31, 2024. Progress Reports are due at the end of each month.</i>	<i>Funds will be disbursed by the end of the subsequent month that a progress report was submitted.</i>
	June 30, 2024	July 31, 2024
	<i>Starting July 2024, Progress Reports will be due on a quarterly basis.</i>	<i>Funds will be disbursed by the end of the subsequent month on a quarterly basis.</i>
	September 30, 2024	October 31, 2024
	December 31, 2024	January 31, 2025
<b>2025</b>	March 31, 2025	April 30, 2025
	June 30, 2025	July 31, 2025
	September 30, 2025	October 31, 2025
	December 31, 2025	January 31, 2026
<b>2026</b>	March 31, 2026	April 30, 2026

# Summary of DSA Signatory Grant Options

Eligible DSA Signatories may apply for **one** of the following grant opportunities:

	 <b>Qualified Health Information Organization (QHIO) Onboarding Grant</b>	 <b>Technical Assistance (TA) Grants</b>
	<i>The “<b>assisted</b>” pathway.</i>	<i>The “<b>build your own</b>” pathway.</i>
<b>Required Grant Outcomes</b>	<p>Complete onboarding with a <b>Qualified Health Information Organization (QHIO)</b></p> <p>➤ A QHIO is a health information organization that has been qualified by CDII based on its ability to meet DXF data exchange requirements.</p>	<p><b>Achieve at least one of the following required outcomes:</b></p> <ol style="list-style-type: none"> <li>1. Identified and contracted with a technology solution</li> <li>2. Implemented a technology solution capable of supporting real-time data exchange</li> <li>3. Adjusted, upgraded, or adopted an electronic documentation system</li> <li>4. Created or provided training for new workflows</li> </ol>
<b>Activities</b>	CDII will publish a list of QHIOs, who can help Signatories <b>identify technical or operational solutions to complete onboarding.</b>	<b>Applicants</b> are responsible for identifying technical or operational solutions to achieve DSA requirements.
<b>Application Process</b>	<b>Applications are submitted by CAHIE on the Applicant’s behalf.</b>	Applications are submitted by the <b>Applicant.</b>
<b>Grant Management</b>	<b>The Grantee’s contracted QHIO receives and manages grant funds.</b>	The <b>Grantee</b> receives and manages the funds directly.

# Selecting a QHIO: Round 1 & 2 Grantees

**QHIO Onboarding Grantees must select a QHIO that their organization will onboard to. This QHIO will manage their grant and submit all progress reports.**



If you were awarded a QHIO Onboarding Grant before the announcement of QHIOs on October 24, 2023, you must select a QHIO before October 24, 2024.

**Until you choose a QHIO, you will be responsible for submitting all required Progress Reports.**

- Applications submitted **after the announcement of QHIOs** were required to identify the QHIO with which they intended to contract with upon submission of their Application, although no QHIO selection is final until a Grantee has attested to Milestone 1.
- To update your DxF Grants Portal profile with information about your chosen QHIO, please reach out to PCG.
- PCG will give access to the QHIO's reporters to upload progress reports and allow Grantee staff the option to review and confirm uploaded information should they choose.



# Key Concepts

## Signatory

A **Signatory** is defined as an organization that has signed the DSA. Organizations may sign the DSA directly, or a “parent organization” may sign the DSA on their behalf as a “subordinate organization.”

*A subordinate organization is considered a Signatory for the purpose of the DSA Signatory Grant Program.*

## Applicant or Grantee

An **Applicant or Grantee** is the organization that submits the Application for a DSA Signatory Grant. An Applicant may be a Signatory applying on its own behalf, or it may be an organization apply on behalf of one or multiple Signatories (referred to as an Umbrella Applicant). An applicant turns into a Grantee once they have been awarded a Grant.

*Applicants are referred to as “Grantees” if they receive a DSA Signatory Grant.*

## Instance

An **Instance** represents a singular configuration for an electronic record system product -- which may be an electronic health record (EHR) or otherwise\* -- that may exist within and/or across multiple DSA Signatories included in the Application.

*\*Organizations that do not have an EHR should consider their current electronic record system.*

## QHIO

A **Qualified Health Information Organization (QHIO)** is an HIO that has been “qualified” by CDII based on its ability to meet DxF data exchange requirements.

## TA

**Technical assistance** is technological or operational support for an organization and can comprise a range of activities.