



# Data Exchange Framework

## Implementation Advisory Committee (IAC) Meeting

Tuesday, March 19, 2024

12:00 PM – 2:30 PM 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 [DxF@chhs.ca.gov](mailto:DxF@chhs.ca.gov).
  - Questions that require follow up should be sent to [DxF@chhs.ca.gov](mailto: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](mailto: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 [DxF@chhs.ca.gov](mailto:DxF@chhs.ca.gov).

# Agenda



- 12:00 PM  
Welcome and Roll Call
- 12:05 PM  
DxF and its Vision
- 12:10 PM  
DxF Implementation and  
Communications Updates
- 12:30 PM  
Qualified Health Information  
Organization (QHIO) Program  
Updates
- 12:50 PM  
Technical Advisory  
Subcommittee (TASC) Launch  
and Topic Roadmap

- 1:05 PM  
Policies and Procedures (P&P)
- 1:15 PM  
DxF Go-live/Implementation Feedback
- 1:40 PM  
DxF Impact Measurement
- 2:15 PM  
Public Comment
- 2:25 PM  
Next Steps and Closing Remarks

# Welcome and Roll Call



# Speaker Introductions

## John Ohanian

CDO, CalHHS  
Director, CDII

## DeeAnne McCallin

Deputy  
Director, CDII

## Derek Jansen

Senior  
Director, RALLY

## Rim Cothren

Independent HIE  
Consultant, CDII

## Cindy Bero

Senior Advisor,  
Manatt Health  
Strategies



# 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
Brian Henricksen	Director, Global Medical Response	California Ambulance Association
Cameron Kaiser	Deputy Public Health Officer	County of Solano
Mark Knee	Acting Division Director, Interoperability Division	Office of the National Coordinator for Health Information Technology (ONC)
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
Pam Martinez	Emergency Medical Services Director	Ontario Fire Department
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

# DxF and its Vision



# The Vision for Data Exchange in California

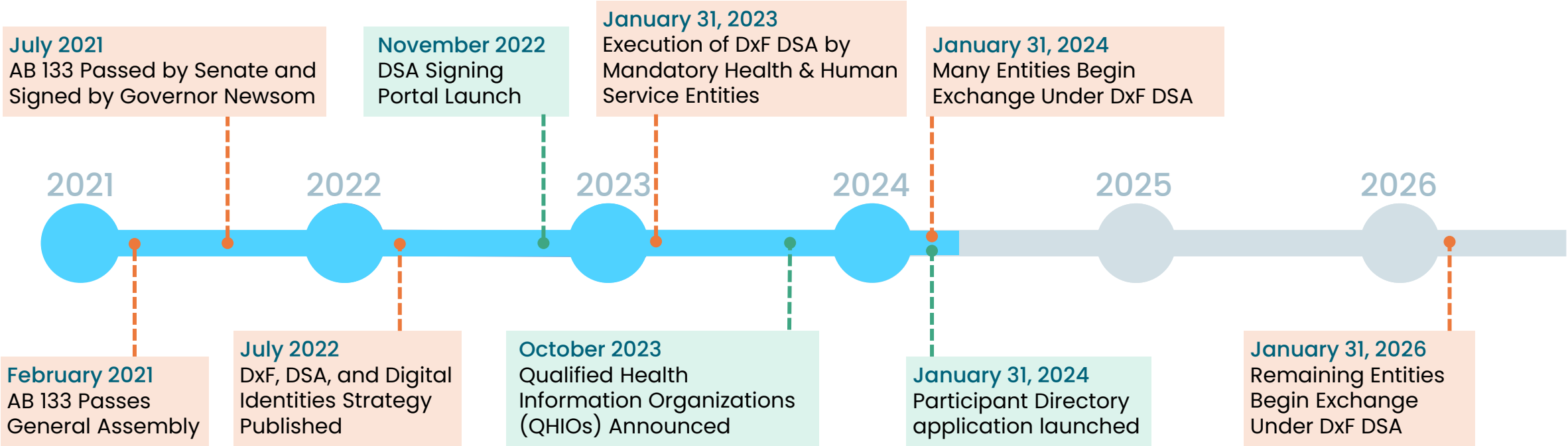
The Data Exchange Framework (DxF) creates new connections and efficiencies between health and social services providers, improving whole-person care.

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 Implementation Timelines

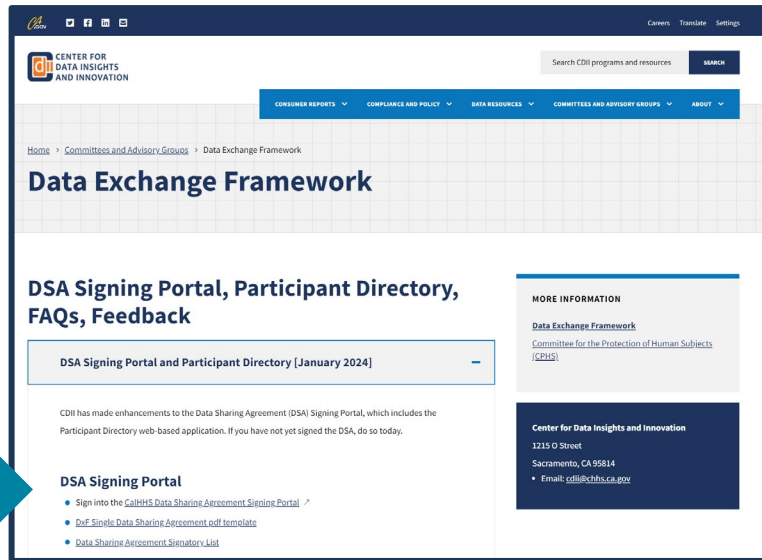
Exchange under the DxF became effective January 31, 2024



# Mandatory Signatories – Sign the DSA Immediately and Enter Choices in the Participant Directory

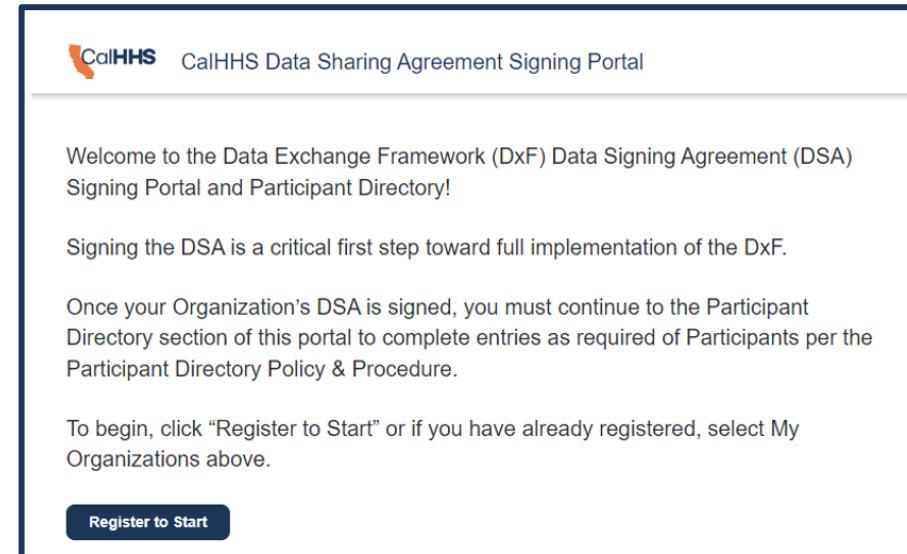
Mandatory signatories were required to execute the DSA by January 31, 2023.

LINK TO DSA SIGNING PORTAL AND THE  
PARTICIPANT DIRECTORY ON [DxF WEBPAGE](#)



The screenshot shows the website for the Center for Data Insights and Innovation. The main heading is "Data Exchange Framework". Below it, there is a section titled "DSA Signing Portal, Participant Directory, FAQs, Feedback". A blue arrow points to a link labeled "DSA Signing Portal" in the "MORE INFORMATION" section. The link text is "Sign into the CalHHS Data Sharing Agreement Signing Portal".

DSA SIGNING PORTAL AND PARTICIPANT  
DIRECTORY LANDING PAGE



The screenshot shows the landing page for the CalHHS Data Sharing Agreement Signing Portal. The page includes the CalHHS logo and the title "CalHHS Data Sharing Agreement Signing Portal". The main content area contains the following text:

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

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

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

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

At the bottom of the page, there is a button labeled "Register to Start".

# All DxF Signatories – Enter Choices in the Participant Directory

All Signatories to the DSA are obligated by the Participant Directory P&P to make choices on how to exchange. To access the Participant Directory, an Organization must have a signed DSA.

## WHERE TO ACCESS THE PARTICIPANT DIRECTORY

The screenshot shows the CalHHS Data Sharing Agreement Signing Portal. At the top, there is a navigation bar with the CalHHS logo, the page title "CalHHS Data Sharing Agreement Signing Portal", and links for Home, My Organizations, Help, a search icon, and a user profile for Robert Cothren. The main heading is "Data Sharing Agreement". Below this, there are instructions: "To enter or update DSA signing details, click on the name of your primary organization below. To launch the Participant Directory entry form, click on the Participant Directory button." A "Participant Directory" button is highlighted with a white arrow labeled "click". Below the instructions, there is a "Primary Participant Seal" section with a seal icon and links for "Download Participant Seal" and "Participant Seal Usage Instructions". A white arrow labeled "check" points to the "Account Status" column in the "Primary Organization" table. The table has columns for Account Name, Account Type, Account Status, Signatory, and Signatory Email Address. The row for "Demo Organization" shows "Acute Care Settings" for Account Type, "DSA Document Signed" for Account Status, "Self" for Signatory, and "robert.cothren@chhs.ca.gov" for Signatory Email Address.

Account Name ↑	Account Type	Account Status	Signatory	Signatory Email Address
<a href="#">Demo Organization</a>	Acute Care Settings	DSA Document Signed	Self	<a href="mailto:robert.cothren@chhs.ca.gov">robert.cothren@chhs.ca.gov</a>

[DSA Signing Portal URL](#)

## WHERE TO FIND MORE INFORMATION

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

- [Participant Directory How-To Guide](#)
- [Participant Directory Walkthrough Webinar](#)
- [Participant Directory Listing](#)
- [Participant Directory Flat-File Format Guide](#)

Contact CDII if your organization has questions about accessing the Participant Directory portal application.

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

# Participant Directory

## *Did you know?*

If you entered NOT APPLICABLE for Requests for Information, that signals to other Participants that you:

- 1) Do not Maintain any HSSI; or
- 2) Are a signatory and primary organization that listed subordinate organizations on your DSA and intend for only the subordinate organizations to exchange HSSI under the DxF.

If you entered NOT APPLICABLE for Information Delivery, that signals to other Participants that you are not interested in receiving information created in response to an Order or Referral from other Participants on the DxF.



# DxF Implementation Updates



# DxF Implementation Updates – March 2024

Since the last IAC meeting, CDII & stakeholders have continued to advance DxF implementation across several domains.



## Governance

- The Technical Advisory Subcommittee launched on March 5, 2024.
- The DSA P&P Subcommittee met on March 6, 2024 to discuss P&P activities for 2024.
- The next meeting of the IAC is on May 22, 2024.



## DSA P&P Development

- P&Ps are effective as of January 31, 2024.
- CDII may amend P&Ps and/or propose new P&Ps as necessary or desirable to advance the objectives of the DxF.



## DxF Grants

- DSA Signatory Grants Round 3 award notifications have been sent to applicants .
- CDII will publish a list of Grantees once all Grant Program Acknowledgments have been signed.
- CDII hosted a Grantee Webinar on February 29, 2024 to provide DSA Signatory grantees with information on Grantee responsibilities and next steps.



## QHIO

- The [QHIO At A Glance Document](#) provides overview information to assist DxF Participants in choosing a QHIO.
- CDII has decided to not issue a QHIO application in 2024.
- CDII is developing additional resources to support the QHIO Program.



## Participant Directory

- The Participant Directory was launched and publishes a weekly listing indicating how Participants are choosing to exchange and receive HSSI.

# Signatory Count as of 03/08/2024

**There are over 2,300 signed DSAs that represent ~3,400 Participants**

Participant Type ( <i>Self-Attested</i> )	Signatories*
Hospitals (General acute care settings and acute psychiatric settings)	253 of 525 (48%)
Physician organizations and medical groups	1,727
SNFs	700 of 1,198 (58%)
Plans	80 of 184 (43%)
Clinical Labs	193 of 2,551 (5%)
QHIOs	9 of 9
County or State	68
Other (CBOs, Intermediaries, others)	400
<b>Total Participant Type Count</b>	<b>3,430</b>

*\* Subordinate level sub-totals, some figures are approximated ; CDII led denominator analysis continues to be work-in-process*

The weekly list of organizations that have signed the DSA is undergoing modifications.

# Participant Directory Choices

*as of 03/13/2024*

Organizations (primary and subordinate) entering choices	436
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Of those organizations entering choices in the Participant Directory:

Entity Type Selected	Request for Info	Info Delivery	ADT Events
Nationwide networks and frameworks	32%	30%	-
Qualified HIOs	60%	61%	66%
SELF (point-to-point connections)	5%	4%	15%
OTHER (not a nationwide network or QHIO)	0%	2%	1%
NOT APPLICABLE	3%	3%	17%

Organizations electing to exercise the option to delay exchange until January 31, 2026, as allowed under Health and Safety Code § 130290 or the Requirement to Exchange Health and Social Services Information P&P	19%
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The Participant Directory Listing in machine-readable flat-file format is available [on the DxF webpage](#).

# DxF Communications Update



# DxF Communications

## THE FUTURE OF HEALTHCARE IS HERE

→ The monumental efforts over the past two and a half years reflect the state's commitment to equitable, modern healthcare. The DxF will modernize the entirety of California's health system, disrupt long-standing inequities, and deliver timely, safe, and effective whole-person care to all Californians.

**Your dedication has led to this historic achievement.**



# Implementation Communications Push

**THE START OF STATE-WIDE, SECURE EXCHANGE IS REVOLUTIONARY**

**A REMARKABLE ACHIEVEMENT AND KEY STEP TOWARDS A HEALTHY CALIFORNIA FOR ALL**

- The Jan. 31, 2024 implementation deadline was an opportunity to celebrate the accomplishments of CalHHS, CDII, and our partners, while announcing California's vision for modern healthcare under the DxF.

**FOR IMMEDIATE RELEASE**

January 31, 2024

## **Health and Social Services Entities Begin Statewide, Secure, Real-Time Exchange of Electronic Health Records to Support a Healthier California**

### **WHAT YOU NEED TO KNOW:**

The [Data Exchange Framework](#) (DxF) was signed into law on July 27, 2021 by Governor Gavin Newsom to require the secure, real-time exchange of health and social services information throughout California. Beginning January 31, 2024, many healthcare entities in the state are required to share information with other providers and payers under DxF Policies and Procedures, setting the stage for coordinated, continuous, and informed care for all Californians.

**SACRAMENTO, CA** — Today, the California Health & Human Services Agency (CalHHS) Center for Data Insights and Innovation (CDII) marks the start of statewide, secure data exchange of health and social services information required under the Data Exchange Framework (DxF). This key step towards a Healthy California for All puts people at the center of modern healthcare that expands coverage, advances equity, and improves connections between health and social services entities.

Over the past two and a half years, CDII executed a transparent, public process that brought together key stakeholders, advocates, and the interested public to develop the Policies and Procedures of the groundbreaking DxF.

"Governor Newsom and the legislature challenged us to develop a framework that modernizes California's information exchange between and among health and social services providers to improve coordination and continuity of care," **said Dr. Mark Ghaly, Secretary of CalHHS.**

# What We're Saying

## THE DXF IS TRANSFORMING CA HEALTHCARE

- California is advancing equity by pioneering integrated healthcare between health and social services
- Access to information enhances continuity of care for all
- Putting patients at the center of care
- Empowering providers with more information
- Modernizing the patient experience
- Proves government does big things





# Social Media: Twitter / X

11:15 5G

Post

CalCDII @CDIIGov Follow

Today marks the start of statewide, secure data exchange!

Thanks to the incredible work of stakeholders, CalHHS & the commitment of our partners, the Data Exchange Framework will enable a more modern patient experience and empower providers to deliver the best possible care.



9:46 AM · 1/31/24 From Earth · 510 Views

3 Reposts 1 Quote 4 Likes

Post your reply

California Governor reposted

CalCDII @CDIIGov · Feb 1

Modern healthcare, better health outcomes.

The DxF facilitates safe, secure, real-time data exchange.

Say hello to expanding exchange, advancing equity, and improving connections between health & social services entities.



2 6 10 4.5K

4.5k views!

California Governor reposted

CA Health & Human Services @Ca\_HHS · Feb 14

Every Californian, no matter where they live, should be able to walk into a doctor's office or emergency room and be assured their provider can access the information needed to provide safe, effective, whole-person care.

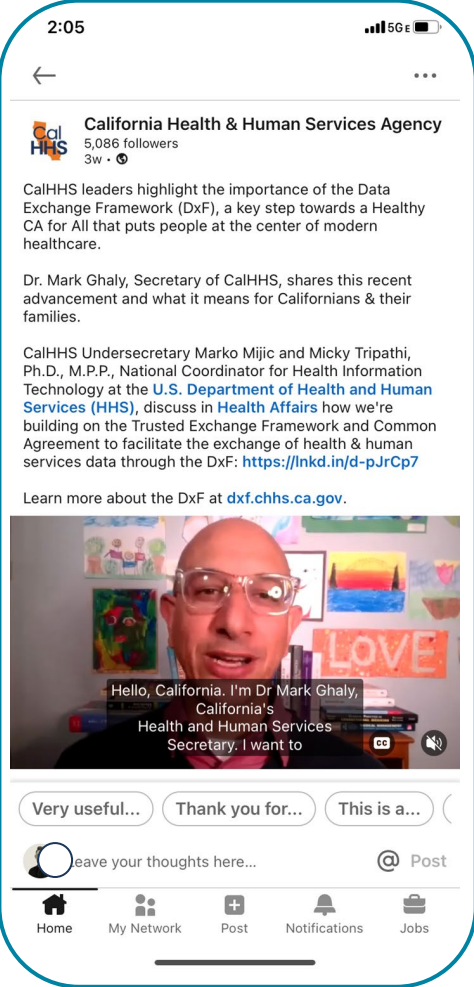
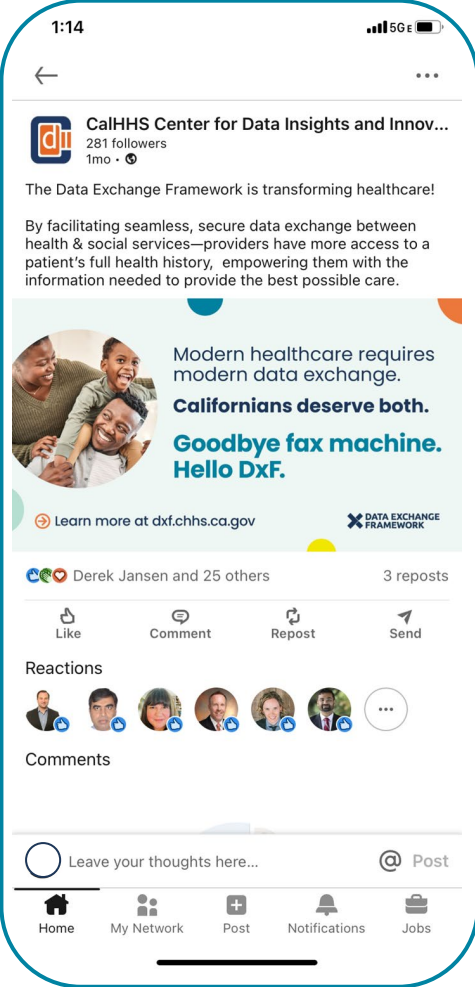
Welcome to the DxF: [dxf.chhs.ca.gov/for-individuals](https://dxf.chhs.ca.gov/for-individuals)



5 23 34 6.5K

6.5k views!

# Social Media: LinkedIn



*"I want to share some exciting news about a remarkable advancement in how our health and social services systems support Californians and make our state healthier." – Sec. Mark Ghaly*



# Expanding Communications

## CONTINUE TELLING AN ACCESSIBLE, HUMAN-CENTERED STORY

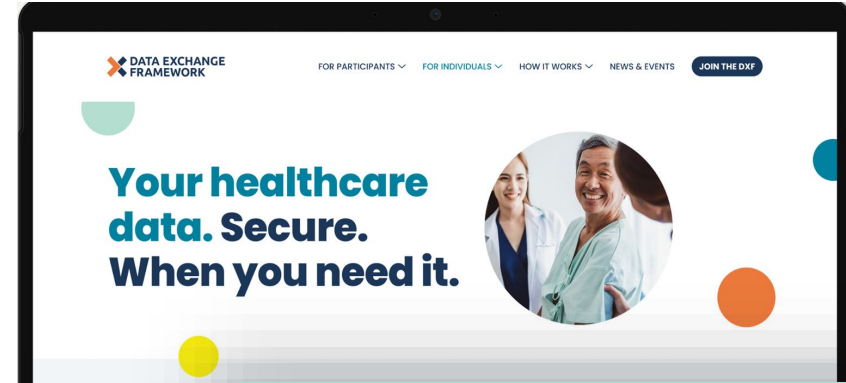
## THE DxF IS CREATING A HEALTHY CALIFORNIA FOR ALL

### → External Communications

- ◆ DxF Website
- ◆ Social Media
- ◆ Stakeholder Outreach
- ◆ Stakeholder testimony videos
- ◆ Earned Media
- ◆ Sec. Ghaly Op-Ed

### → Stakeholder Communications

- ◆ DxF Weekly Update
- ◆ Infographics
- ◆ Toolkits



# We Want Your Help!

## HELP US SPREAD THE WORD ON HOW THE DxF IS TRANSFORMING CALIFORNIA HEALTHCARE

- Amplify our message! Follow, like, and share our social media posts.
- Expand our storybank! Share stories of how the DxF is improving care, modernizing the patient experience, and improving outcomes.
- Encourage your network to sign up for updates at [dxf.chhs.ca.gov](http://dxf.chhs.ca.gov)
- Other ideas? Let us know! Email [dxf@chhs.ca.gov](mailto:dxf@chhs.ca.gov)



# Qualified Health Information Organization (QHIO) Program Updates



# QHIO Program

## QHIO Policy and Procedure

*"CDII shall establish, manage, and oversee a **Qualified HIO Program** that, among other things, shall set forth the **requirements** for a Participant that is an Intermediary to be designated as a Qualified HIO and any **ongoing obligations** that a Qualified HIO must meet in order to retain such designation."*

## Status

- The **2023 QHIO Application** established the requirements to be designated a QHIO.
- Each QHIO signed a **Memorandum of Understanding (MOU)** in which they committed to meeting the QHIO Program requirements set forth by CDII.
- The **QHIO Program** will identify ongoing obligations not within the 2023 QHIO Application that QHIOs must meet to retain this designation.
- QHIO Program resources will be posted on the CDII DxF webpage as developed.

# QHIO Program Components (1)

Component	Description	Status
★ QHIO-to-QHIO Data Sharing	<p>QHIOs will exchange information for <i>"Requests for Information and Information Delivery with other QHIOs on behalf of its DxF Participants, as appropriate."</i> (2023 QHIO Application, C.7)</p> <p>QHIOs must be able to share a roster with other QHIOs, match incoming events to the individuals on the roster, and notify the originating QHIO of matched events.</p>	<p>Request for Information and Information Delivery requirements are defined.</p> <p>ADT roster sharing requirements are under development.</p>
Feedback Process	<i>"QHIOs must fully cooperate with CDII"</i> (2023 QHIO Application, A.12)	A first generation DxF feedback form has been developed and posted to the DxF webpage.
★ QHIO Roles and Requirements	Overview of the QHIO role and requirements set forth in the QHIO application.	CDII is reviewing QHIO input
★ DxF Reporting Requirements	Summary of QHIO reporting requirements.	CDII is developing draft reporting requirements to discuss with QHIOs

★ **Indicates a QHIO Program Near-Term Priority**

# QHIO Program Components(2)

Component	Description	Status
Compliance & Oversight	Overview of processes for CDII to implement corrective action plans and remove QHIO qualification.	To be developed
QHIO Collaboration	Expectations for QHIO collaboration with CDII and other QHIOs.	In process
Communications Guidelines	DxF-related communications requirements & guidelines for QHIOs (e.g., use of Q-Seal).	Complete
QHIO Grant Requirements	Obligations of QHIOs with respect to DSA Signatory Grants.	Grant requirements developed via Grants Guidance Document. QHIO-specific requirements in progress.



# QHIO Program Discussion

## For Discussion:

- Does the IAC agree with the near-term priorities discussed (i.e., QHIO-to-QHIO sharing, QHIO Roles and Requirements, and QHIO DxF Reporting Requirements)?
- Are there other QHIO Program components not outlined that CDII should prioritize the development of?
- What other feedback do IAC members have to share about the QHIO Program based on their experiences and the experiences of those in their networks?
  - *Please keep feedback constructive and do not name individual QHIOs.*

# Technical Advisory Subcommittee (TASC) Launch and Topic Roadmap

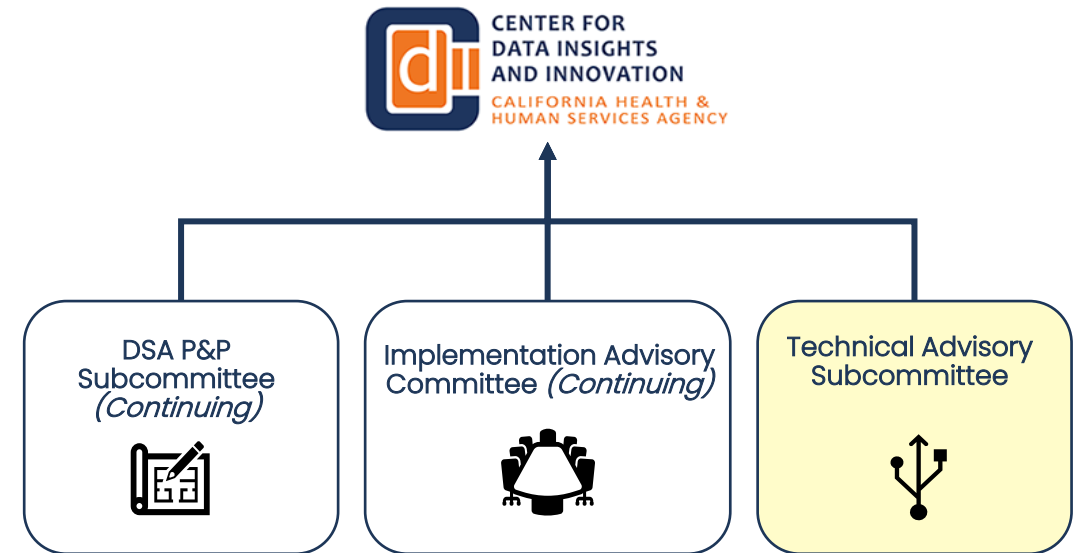


# TASC Update

The **Technical Advisory Subcommittee (TASC)** was formed to advise CDII on a variety of DxF technical and implementation priorities (e.g., standards adoption, ADT architecture, social services data standards, FHIR adoption) and topics requiring significant and/or specialized technical and operational expertise.

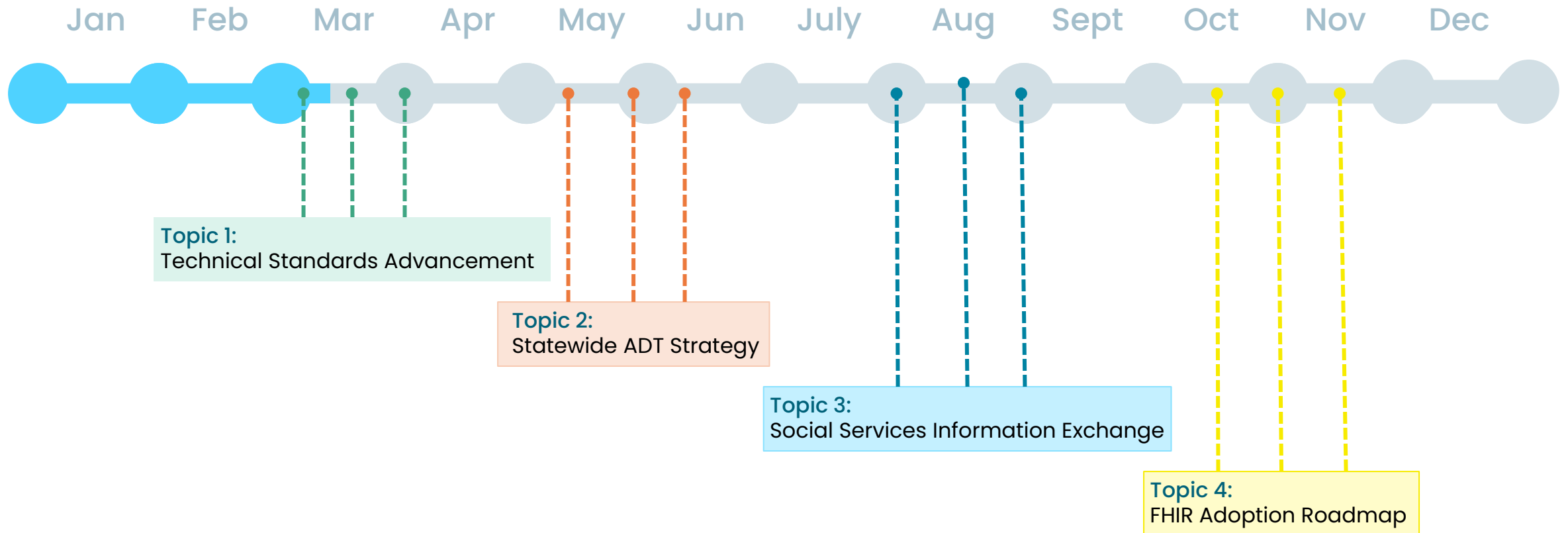
The TASC convened at its first meeting on Tuesday, March 5, 2024. Members of the TASC represent:

- *Ambulatory providers*
- *Behavioral health organizations*
- *Counties*
- *EHRs and other vendors*
- *Emergency medical services*
- *Hospitals (large and small)*
- *Intermediaries*
- *Laboratories*
- *Plans*
- *Policymakers, including ONC*
- *Public health*
- *Skilled nursing facilities*
- *Social services*



# DxF 2024 TASC Anticipated Topic Roadmap

TASC Meetings will be held in clusters of 60-minute meetings to support rapid decision-making on priority topics\*



# TASC Roadmap (1 of 2)

## Anticipated Topics to Address in 2024

CDII has prepared a suggested list of topics to cover with the Technical Advisory Subcommittee (TASC).  
What priorities do IAC Members recommend? What topics may be missing?

### **Topics currently anticipated for TASC discussion that have been proposed by CDII include:**

- ❖ Technical Standards Advancement: How should emerging and maturing standards be evaluated as potential requirements for the DxF?
- ❖ Statewide ADT Strategy: How can California advance notifications of admissions and discharges statewide? What additional standards and guidance are needed? What emerging architectures can be leveraged?
- ❖ Social Services Information Exchange: How can California advance exchange of not only health information but also social services information given the current immaturity of technical standards?
- ❖ FHIR Adoption Roadmap: How can DxF advance technical requirements to leverage federal advancement of FHIR APIs? How can emerging adoption and national coordination be leveraged?

### **Additional topics that have been mentioned by DSA P&P Subcommittee include:**

- ❖ What can be done to advance Individual Access Services?
- ❖ What should be done to advance requirements for push information delivery?

# TASC Roadmap (2 of 2)

## *Potential Topics to Address: Soliciting Input*

What other topics should be prioritized by the TASC for discussion in 2024?

# Policies and Procedures (P&Ps)



# Published P&Ps

Prior to the January 31, 2024, DxF implementation date, CDII published fifteen (15) Policies & Procedures and a DxF Glossary of Defined Terms.

- [DxF Glossary of Defined Terms](#)
- [Process for Amending the DSA](#)
- [Development of and Modifications to Policies and Procedures](#)
- [Breach Notification](#)
- [California Information Blocking Prohibitions](#)
- [Data Elements to be Exchanged](#)
- [Fees](#)
- [Individual Access Services](#)
- [Individual Access Services Alternative to Electronic Access](#)
- [Participant Directory](#)
- [Permitted, Required, and Prohibited Purposes](#)
- [Privacy Standards and Security Safeguards](#)
- [Qualified Health Information Organization](#)
- [Real-Time Exchange](#)
- [Requirement to Exchange Health and Social Services Information](#)
- [Technical Requirements for Exchange](#)

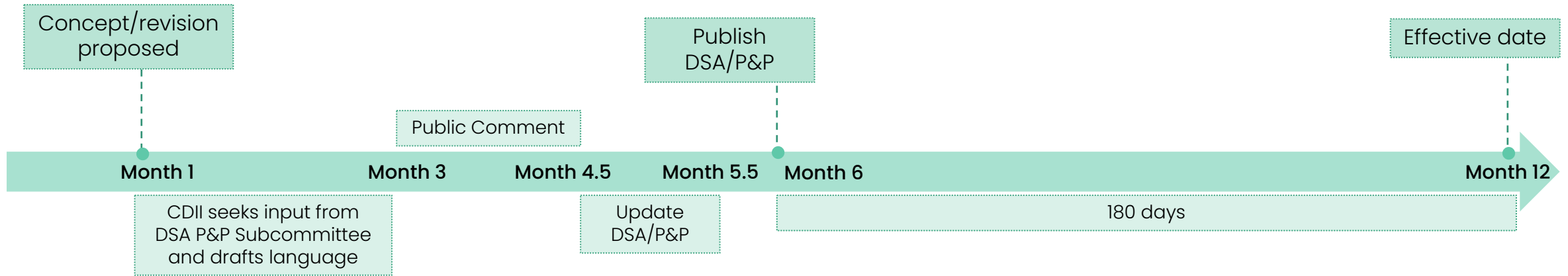
**CDII thanks Members of the IAC for their continued engagement and efforts to advance the DxF.**



# DSA/P&Ps: Development and Revision Process

An illustrative timeline for DSA and P&P development or modifications

Development of or modifications to the DSA and P&Ps requires a minimum of 11 months from time of concept to effectuation.



*Total time for development/modification: 11-15 months*

Please see Section III.5. of the [Development of and Modification to Policies and Procedures P&P](#) for more information on timelines for the Administrative Modification Process (not shown in slide).

# DxF Go-Live / Implementation Feedback



# For Discussion: Go-live Implementation Feedback



1. What successes have your organization/sector experienced preparing for or following the start of exchange under the DxF on January 31, 2024?
2. What challenges have your organization/sector encountered?
3. What actions can CDII and stakeholders take to support the successful exchange of information under the DxF?

# DxF Feedback Form

CDII has developed and published a DxF Feedback Form, opening another pathway for CDII to receive input from the DxF community.

- The DxF Feedback Form has been published on the CDII website under the DxF FAQs and Feedback Form [January 2024] section.
- A Microsoft form will collect feedback regarding the DxF, asking questions of the submitter that will inform CDII of DxF activities.
- CDII will triage feedback as appropriate.

## Data Exchange Framework (DxF) Feedback

This form will collect feedback related to the DxF including the exchange of health and social services information (HSSI). The form will collect your feedback and ask additional questions to help CDII review and process this feedback.

You will not receive an automated confirmation upon submission of the form, however CDII will send an email acknowledgement within three (3) business days of your submission. This email will inform you as to CDII's initial assessment of your feedback and will include the next steps if applicable. If you do not receive an acknowledgement email from CDII within three (3) business days, please reach out to CDII at [dxfr@chhs.ca.gov](mailto:dxfr@chhs.ca.gov) and/or resubmit the form.

Do not use this form to report a Breach of HSSI. In the event you have a Breach of HSSI to report to CDII, as required by the Breach Notification Policy and Procedure, please send an email to [dxfr@chhs.ca.gov](mailto:dxfr@chhs.ca.gov) with the subject line "BREACH NOTIFICATION." CDII recommends that you flag that email as urgent or high priority.

NOTE: The information collected by CDII on this feedback form may be public records subject to the California Public Records Act. Please do not submit confidential information, including personal and/or medical information.

[DxF Feedback Form](#)

# DxF 2024: Topics for Discussion

During its March 6, 2024 meeting, the DSA P&P Subcommittee noted several potential topics that could be prioritized for DxF Committee discussion in 2024.

Topic	Potential Description
Cyberattacks	Approach for responding to cyberattacks (e.g., recent Change Healthcare incident)
Intermediaries	Role of non-Participant Intermediaries in the DxF and associated expectations related to flowdowns.
Push Transactions	Advancing use of push transactions under the DxF
Individual Access Services	Advancing individual access services under the DxF
TEFCA	Potential opportunities to further align the DxF with TEFCA

## Discussion Questions:

- Are these the right set of priorities?
- Which of these topics are of highest priority?
- Are there topics that are missing?

# Assembly Bill 352 Stakeholder Update

AB 352 requires specified businesses that electronically store or maintain medical information on sensitive services to enable certain security features related to abortion, abortion-related services, and gender-affirming care.

*Implications for the DxF include the following:*

- Health and Safety Code 130290 was updated to **exclude health information related to abortion and abortion-related services** from the required exchange of health information under the DxF. Please note this does not include health information related to **gender-affirming care or other sensitive services**.
- In late 2023 and early 2024, CDII made **administrative changes to three P&Ps** documenting alignment with applicable law to exclude abortion and abortion-related services information from required exchange. The impacted P&Ps include:
  - [Privacy Standards & Security Safeguards](#)
  - [Permitted, Required, and Prohibited Purposes](#)
  - [Data Elements to Be Exchanged](#)
- CDII, in collaboration with CalHHS, is **considering other approaches and guidance** it may propose given stakeholder feedback.

# DxF Impact Measurement



# DxF Impact Measurement – Overview

CDII is developing a strategy to assess impact of the DxF against initiative goals.

## *DxF Vision*

Every Californian, and the health and human service providers and organizations that care for them, will have timely and secure access to usable electronic information that is needed to address their health and social needs and enable the effective and equitable delivery of services to improve their lives and wellbeing.

## *DxF Guiding Principles<sup>+</sup>*

1. Advance health equity
2. Make data available to drive decisions and outcomes
3. Support whole person care
4. Promote individual data access
5. Reinforce individual data privacy and security
6. Establish clear and transparent terms and conditions for data collection, exchange, and use
7. Adhere to data exchange standards
8. Ensure accountability

**Discussion Question: Are there other concepts to which CDII should anchor its impact measurement priorities?**



# Why Impact Measurement?

Assessing the impact of the DxF will allow CDII to better understand how the DxF is being operationalized and communicate its value.

## Primary Purpose



*Determine whether the purpose and goals of the DxF are being met.*

## Additional Purposes



*Communicate the value of DxF to Participants, legislators, and other stakeholders.*



*Identify the DxF components that are working well and areas in need of improvement.*



*Identify future opportunities to expand and/or extend the DxF.*

Discussion Question: What other purposes and objectives should impact measurement be designed to fulfill?

# What is Impact Measurement?

Impact is demonstrated over the long-term and measurement is focused on key priorities within the initiative.



## ***Impact Measurement Is:***

- An assessment of the impact of key DxF priorities
- Conducted over the long-term (e.g., impacts are demonstrated over months or years, as opposed to days or weeks)



## ***Impact Measurement Is Not:***

- Real-time monitoring of DxF activity
- A detailed, comprehensive evaluation of all DxF initiatives

# Measurement Considerations and Challenges

The unique nature of the DxF as a data exchange framework and not a prescribed IT system or database yields a number of complexities with data accessibility and reporting.

Consideration	Challenge
The DxF is a framework, not a technology or data network.	There is no universally shared data exchange infrastructure to monitor or measure.
Use of QHIOs is optional.	Metrics reliant on data from QHIOs will not paint a comprehensive picture of the DxF.
The DSA Signing Portal and Participant Directory are the only common infrastructure across all Participants.	Readily measurable data may be limited to those related to Participant characteristics and exchange choices.
Additional reporting processes common to all Participants have not been established.	Measurement may be predicated upon reporting requirements or data collection performed by other CalHHS departments.

# Draft Principles for Impact Measurement – *For Discussion*

The DxF Impact Measurement approach should be structured to evaluate DxF impact while minimizing additional administrative burden to stakeholders.

*The DxF Impact Measurement approach should:*

- Include metrics of **structure, process, and outcome**
- Include **quantitative metrics** even though they cannot capture all DxF activity
- Include **qualitative metrics** even though they might be subjective
- Prioritize **metrics with known denominators**
- Prioritize **metrics focused on downstream outcomes**, even if changes to performance cannot be fully attributed to the DxF
- Include **some metrics focused on transaction volume**, while acknowledging that volume may not necessarily correlate with use or value
- Minimize **reporting burden and expense** to the extent feasible

**Discussion Question: Are there additional principles for Impact Measurement that should be considered?**

# Proposed Priority Measurement Domains

Impact may be evaluated across a comprehensive set of measurement domains.



Participation	Security of Data Exchange	Efficiency of Data Exchange	Stakeholder Perception	Improvements in Whole-Person Care
<i>e.g., Participant and transaction characteristics</i>	<i>e.g., Number of reportable events</i>	<i>e.g., Cost reductions and improvements in healthcare administration</i>	<i>e.g., Participant and individual satisfaction</i>	<i>e.g., Improvements in health outcomes</i>

Discussion Questions: Are there any additional measurement domains to consider?

# Public Comment



# Next Steps and Closing Remarks



# Next Steps

## CDII will:

- Consider the feedback provided by the IAC.
- Incorporate IAC feedback into impact measurement scope and objectives
- Continue to advance P&P and QHIO materials and, where applicable, solicit public comment.

## Members will:

- Provide any additional feedback to CDII at [dxf@chhs.ca.gov](mailto:dxf@chhs.ca.gov)



# CDII DxF Webpage Resources

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

## There you can find:

- The DxF, DSA, and P&Ps;
- Information about the QHIO and DxF Grant programs;
- Materials from previous and upcoming meetings, webinars, and listening sessions;
- FAQs on the DxF;
- Link to the DSA Signing Portal; and
- A list of DSA Signatories.
- And more!

# Upcoming Meetings

IAC Meetings	Date
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

DSA P&P Subcommittee Meetings	Date
DSA P&P SC Meeting #14	April 10, 2024, 1:30 PM – 4:00 PM
DSA P&P SC Meeting #15	June 7, 2024, 11:00 AM – 1:30 PM
DSA P&P SC Meeting #16	July 31, 2024, 12:00 PM – 2:30 PM
DSA P&P SC Meeting #17	September 25, 2024, 12:00 PM – 2:30 PM
DSA P&P SC Meeting #18	December 5, 2024, 12:30 PM – 3:00 PM

TASC Meetings	Date
TASC Meeting #2	March 20, 2024, 1:30 PM – 2:30 PM
TASC Meeting #3	April 2, 2024, 2:00 PM – 3:00 PM