

Capability		Current Practices	Future Enhancements
Data Integration Services		Social and Health data exchange models will likely require multiple modes of data integration based on the functionality of the participating stakeholders. APIs are the standard for modern architectures but may not be supported by all the source systems. For example, some organizations may be limited to FTP (File Transfer Protocols). The ability to support multiple modes of data exchange will improve the accessibility of the model across domains.	Transition from Direct Messaging and FTPs to modern APIs.
Data Services	Identity Resolution	Identity resolution is essential to integrating data across disparate systems. More advanced models may also include master data management, reference data and relationships, i.e. families and custodial adults for foster children.	Include reference data and family relationships and custodial adults for foster children.
	Data Transformation	Data transformation is the service of normalizing, harmonizing or standardizing data based on the data, stakeholders and use cases.	Incorporate data standards such as FHIR or NIEM
	Access Controls	Access Controls limit a user's access to the data appropriate for the user's role within the care team. Access rights are typically determined based on the user's organization, role, relationship to the client/patient and consent status.	Expand access controls to include attribute-based controls. Example
	Consent / Authorization	Consent and Authorization are used to grant permissions for data sharing, referrals, and storing data. Consent / Authorization can grant permission to share data with an organization, a care provider, or across a multi-disciplinary team.	Capture informed consent at a granular level based on data categories instead of systems. Informed consent typically requires a workflow as well as the consent designation. Accommodate consent for foster children which often requires first confirming who has consent authority.

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	Data Segmentation	Within health and social data exchange, there are numerous regulations determining how data can be used depending on the data type and program from which it originates. Balancing privacy with access to holistic data, requires the ability to parse, or segment, data in accordance with policies. Some systems may only be able to segment data by source system while others will have more granular capabilities segmenting at the field level.	Segment data at the field level to optimize the data that can be shared within regulations.
	Data Translation	Data Translation focuses on the understandability of data across systems and may include terminology services and or mapping data. Data mapping may include standard codes such as LOINC or SNOMED or may be tailored to a data consumer's system specifications. Data translation must consider who is receiving the data (system and capabilities).	Include dynamic data translation to deliver the appropriate data based on use case and each data consumer. Adopting standards will improve scalability but will likely be limited to health and justice stakeholders.
Analytics & Reporting	Analytics	Supports systematic analysis of data for statistics, interpretation and discovery. This includes business intelligent capability services that can be used throughout the coordinated care model.	Incorporate artificial intelligence (AI) and / or generative artificial intelligence (GenAI) to support risk modelling, process automation and reduce the complexity of data translations.
	Reporting	Includes all reporting capabilities such as ad hoc and standard reports as well as dashboards and other visualizations. Reports may be delivered via emails, data transmission or via portal. Reporting supports the capabilities for care coordination and for closed loop referral.	More from static point in time reports to dynamic visualizations, chatbots and self-service dashboards to improve personalization and accessibility.
	Data Marts	Data stores used to work with subsets of data for analysis or data management services.	Expand use of data marts to reduce need for central data warehouse.
	Data Warehouse	Centralized data repository used to support reporting	Reduce reliance on a central data warehouse to improve adoption and reduce security risks.

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Referral Management / Closed Loop Referral	Referral Generation	Creation of electronic referral. Log each referral and includes as part of the client / patient's 360-degree view. Referral generation may be supported by external entity such as United Way, Unite Us, Findhelp.org, Epic or others.	Adopt a standard, interoperable referral protocol.
	Referral Tracking	Management of referral from generation to closure	Include the ability to reroute referrals based on wait times
	Provider Directory	Registry or listing of service providers, may be from 211, Unite Us, or FindHelp.org or others	Include available capacity as a gate check to improve referral wait times and better utilize service providers. Expand analytics for selecting providers, such as incorporating cohort outcomes, specializations, and capacity.
Care Coordination	Program Enrollment	Lists the programs for which a client/patient is enrolled. Some models may support enrollment and disenrollment of a patient/client to a program, such as CalFresh, ECM or a program specific to a CBO or POF like Stepping Up.	Include program eligibility, program participation and ability to enroll client in new programs for which they are eligible.
	Care Planning & Coordination	Enables scalable collaboration across multidisciplinary teams. May include assessments, care plans, shared care plans, and care team contact list.	Ability to subscribe to updates, use of message threads, based on client/patient consent, for care team to collaborate. Add patient / client or family members to the care team.
	360 View	Longitudinal view of the client/patient across systems. The view may be supported by data within the system or may pull data directly from source systems in real-time. Data included is based on access controls and consent.	Expand view to include patient / client and family or care providers. Include the ability of the patient / client to update and/or add information to the longitudinal view.
	Alerts & Notifications	Electronic communication of information, typically information requiring action. Alerts may take the form of ADTs supported by third party like Point Click Care, or may take the form of highlighted information within the solution and/or emails or texts pointing back to the solution for details.	Ability to subscribe to alerts. Expand alert types to accommodate all stakeholders and support a holistic view across the care continuum.