

**California Health & Human Services Agency
Center for Data Insights and Innovation (CDII)
Joint Data Exchange Framework (DxF) Implementation Advisory Committee (IAC)
and Data Sharing Agreement Policies & Procedures (DSA P&P) Subcommittee
Meeting**

Meeting Summary

May 15, 2025, 9:00 a.m. to 11:30 a.m.

Attendance

Presenters: John Ohanian (CalHHS/CDII), Dr. Rim Cothren (Independent Consultant to CDII), Jacob Parkinson (CalHHS/CDII), Aparna Ramesh (CalHHS), Elison Alcovendaz (DHCS)

Attendees: approximately 57 public attendees joined this meeting via Zoom video conference or through call-in functionality.

See Appendices for DxF IAC and DSA P&P Subcommittee member attendance.

Meeting Notes

Notes aim to elevate major points made by presenters, DxF Advisory Committee members and public commenters during the meeting and may not be a comprehensive accounting of all points made. Meeting materials, full video recording, transcription, and public comments may be found on the [Data Exchange Framework webpage](#).

Welcome

John Ohanian, CalHHS Chief Data Officer and Director of CDII, welcomed attendees to the joint meeting.

DxF Summit Reflections

John and Aparna Ramesh, Chief, Research and Data Insights Branch, CDSS, reflected on the 2025 DxF Summit, "The Road to Whole-Person Care", which brought together 236 health and social services leaders, community-based organizations, and technology experts. John also reflected on the recent DxF Roadshow events.

2025 Technical Standards Updates Advancement

Dr. Rim Cothren, Independent Consultant, CDII, reviewed the Technical Standards Advancement process and the 2024 Standards Committee recommendations for advancement. Rim discussed potential topics for the 2025 committee and invited feedback on whether to pursue advancements for 2026 or 2027 implementation. Member comments included:

- Several members recommended waiting on further federal updates before considering advancements for 2026 and 2027.
- One member flagged the recent [request for information](#) (RFI) from the Centers for Medicare & Medicaid Services (CMS) and Assistant Secretary for Technology Policy (ASTP) and recommended that CDII wait for additional details before advancing technical standards.
 - *Response: CDII will consider whether to respond to the federal RFI.*
- One member noted that certain social services data are missing from the United States Core Data for Interoperability (USCDI) version 3.
 - *Note: Another member noted that ASTP/ONC accepts public comments on the Standards Version Advancement Process (SVAP).*

DxF Participant Directory

Jacob Parkinson, DxF Deputy Director, CDII, provided an overview of the DxF Participant Directory. Jacob invited feedback on how organizations use the Participant Directory and how the resource could be improved.

Member comments included:

- One member noted that the Participant Directory is most useful for sending ADT event notifications.
- Several members provided recommendations for improving the Participant Directory, which included:
 - Allow Participants to specify their exchange purposes (e.g., treatment, payment, healthcare operations, social services data, etc.)
 - Indicate which listed Participants are compliant with DxF requirements.
 - List contact information and data exchange preferences for each Participant.
 - Integrate with national directories to prevent redundant listings and avoid recreating efforts at the state level.
 - Provide an Application Programming Interface (API) endpoint to enable live access to directory data.

Consent Management Architecture

Elison Alcovendaz, Assistant Deputy Director, Health Information Management Division, DHCS, described the Authorization to Share Confidential Medi-Cal Information (ASCM) initiative, ASCM form outline, and proposed use cases. Elison outlined DHCS' proposed Consent Management Platform (CMP), workflow for documenting consent, and discussions with Technical Advisory Subcommittee (TASC) focus groups.

Member comments included:

- One member asked whether the CMP will be limited to Medi-Cal members.
 - *Response: CMP will follow a phased approach, beginning with Medi-Cal and Behavioral Health Transformation (BHT) populations before scaling beyond.*
- One member asked whether DHCS has documented care partner workflow.

- *Response: DHCS has not yet fully documented a care partner workflow but is in the process of doing that and will be seeking stakeholder input to inform and support needed workflow changes.*
- One member asked whether DHCS will use the same vendor for consent and identity management services.
 - *Response: DHCS has not yet determined this.*
- One member flagged the release of a [Sequoia Project white paper](#) on privacy and consent.
- One member highlighted the importance of developing a payer agnostic CMP, citing that behavioral health clients often experience changes in coverage.
- Several members raised questions about whether the CMP will serve as a source of truth for consent, managing identity, and handling historical consent data.
- One member acknowledged the need for clear rules and metadata to track consent origins and changes.
- One member also raised concerns about building a California-specific solution that may not align with national, rules-based models, highlighting the importance of designing for interoperability.

DxF Advisory Committee Updates

John provided an overview of the DxF Advisory Committee changes for 2025, including an announcement that the DSA P&P Subcommittee will be sunset, and replaced with the Privacy, Operations, Policy, and Security (POPS) Committee

DxF Implementation Updates

Jacob provided a brief update on DxF Advisory Committees, DSA P&P development, DxF Grants, and the QHIO program. Jacob also announced that CDII will be conducting a Participant Survey in May.

Public Comment

John opened the meeting to public comment. Public comments included:

- A question about whether QHIO audit results will be made publicly available.
 - *Response: CDII has not yet determined the strategy for releasing QHIO audit results.*
- A suggestion for CDII to consider the DirectTrust messaging framework, which supports human-readable content and may support organizations with limited technical capacity.

Next Steps and Closing Remarks

John reviewed the next steps to close the meeting.

Appendix 1. DxF IAC Members - Meeting Attendance (May 15, 2025)

Last Name	First Name	Title	Organization	Present
Chavez	Dan	Executive Director	Serving Communities Health Information Organization	Yes
Diaz	Joe	Senior Policy Director	California Association of Health Facilities	No
Ford	David	Vice President, Health Information Technology	California Medical Association	Yes
Goodale	Aaron	Vice President, Health Information Technology	MedPoint Management	Yes
Henricksen	Brian	Director, Global Medical Response	California Ambulance Association	No
Kaiser	Cameron	Deputy Public Health Officer	County of Solano	Yes
MacDonald	Scott	Chief Medical Information Officer	UC Davis Health	Yes
Kiefer	Andrew	Vice President, State Government Affairs	Blue Shield of California	Yes
Henry	JaWanna	Chief, Interoperability Division	Assistant Secretary for Technology Policy	Yes
Legé	Matt	Government Relations Advocate	SEIU California	No
Helvey	John	Executive Director	California Association of Health Information Exchanges	Yes
Martinez	Pam	Emergency Medical Services Director	Ontario Fire Department	Yes

Miller	Amie	Executive Director	California Mental Health Services Authority	Yes
Modaressi	Ali	CEO	Los Angeles Network for Enhanced Services	No
Saenz	Lucy	Assistant Director of Data Informatics	California Primary Care Association	Yes
Savage-Sangwan	Kiran	Executive Director	California Pan-Ethnic Health Network	No
Su	Felix	Director, Health Policy	Manifest MedEx	Yes
Willis	Jim	Systems Informatics Leader	CommonSpirit Health	Yes

Appendix 2. DxF DSA P&P Subcommittee - Meeting Attendance (May 15, 2025)

Last Name	First Name	Title	Organization	Present
Barcellona	William	Executive Vice President for Government Affairs	America's Physician Groups	No
Brown	Michelle (Shelley)	Attorney	Private Practice	Yes
Buckner	Jason	Chief Information Officer & Chief Technology Officer	Manifest Medex	Yes
Cretaro	Louis	Lead County Consultant	County Welfare Directors Association of California	Yes
Eisenberg	Matthew	Associate Chief Medical Informatics Officer	Stanford Health	Yes
Helvey	John	Executive Director	SacValley MedShare	Yes
Jain	Sanjay	Manager, Data Analytics	Health Net	Yes
Kaempfer-Tong	Diana	Attorney	California Department of Public Health	Yes
Lane	Steven	Chief Medical Officer	Health Gorilla	Yes
Lind	Kelby	Vice President of Regulatory Affairs	Planned Parenthood Affiliates of California	No
Lowell	Sunny	Acting Chief Privacy Officer	California Department of State Hospitals	Yes
Luu	Belinda	Senior Counsel	Kaiser Permanente	Yes

McGraw	Deven	Chief Regulatory and Privacy Officer	Ciitizen	Yes
Nordhoff	Jackie	Director of Regulatory Affairs	PointClickCare	Yes
Porto	Margaret	Attorney	California Department of Health Care Services	No
Savage	Mark	Managing Director, Digital Health Strategy and Policy	Savage & Savage LLC	No
Schwaninger	Tom	Senior Executive Advisor, Digital Ecosystem Interoperability	LA Care	Yes
Steffen	Elizabeth	Chief Information Officer	Plumas District Hospital	No
Tien	Lee	Legislative Director and Adams Chair for Internet Rights	Electronic Frontier Foundation	Yes
Waltman	Belinda	Director of Analytics Integration	Los Angeles County Department of Health Services	No