



August 9, 2023; 12:00 p.m. PT

Data Exchange Framework: Funding Opportunities & How to Apply

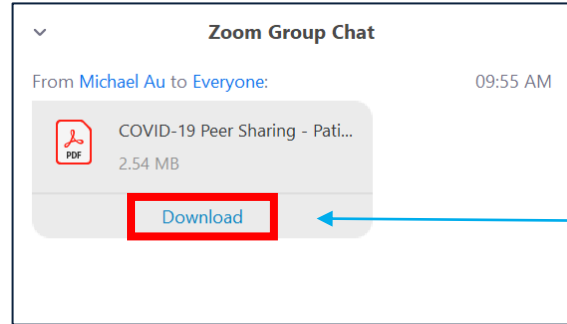
CQC Public Webinar Series



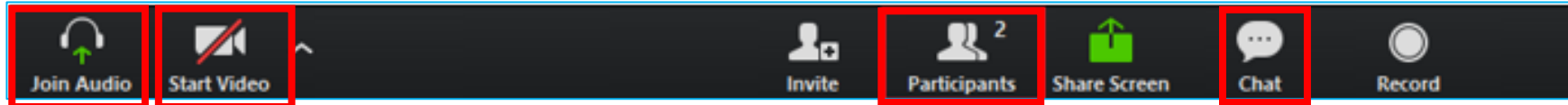
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Tech Tips – Zoom Meetings

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Click to join or mute audio

All attendees have video off upon entry

Click to see who else has joined

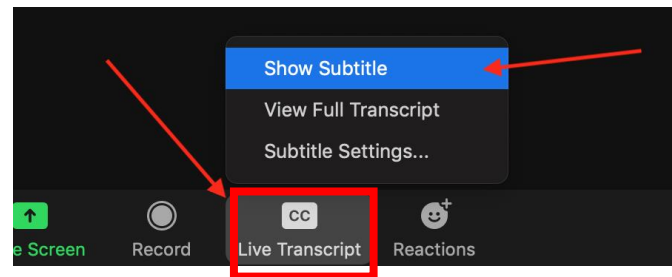
Ask questions and insert comments



Direct message Anna Baer if you have any technical issues



Recording & deck will be shared with attendees



Request live closed captioning or view full meeting transcript

Today's Speakers



Peter Robertson
Senior Director,
Practice Transformation



Stephanie Thornton
Policy Manager,
BluePath Health



Robby Franceschini
Director of Policy,
BluePath Health

California Quality Collaborative

Advancing the quality and efficiency of the outpatient health care delivery system by creating scalable, measurable improvement.

Launched in 2007, CQC is a **multi-stakeholder program**.
Core funding from health plans sharing a delivery system.

Identifies and spreads best practices across outpatient delivery system in California

Trains 2,000 individuals from 250 organizations each year

CQC's track record includes **20% relative improvement** in clinical outcomes and **10:1 ROI**

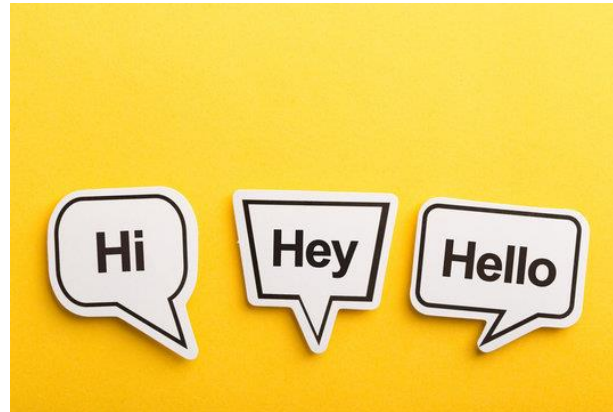
Health Plan Sponsors



Poll: Who's in the (virtual) Room?

Where are you dialing in from?

- Northern CA
- Sacramento
- Bay Area
- Central Valley
- Los Angeles
- Inland Empire
- Southern CA
- Other CA
- Outside of CA



What type of organization do you represent?

- Health Plan
- Medical Group
- Independent Physician Association
- Management Services Organization
- Federally Qualified Health Center / Community Health Center
- Independent Provider/Practice
- Hospital/Health System
- Foundation
- Other [Chat in]

Agenda

Today, we will:



Review the Data Exchange Framework (DxF) and Data Sharing Agreement (DSA)



Walk through the DSA Signatory Grants and application process



Answer questions on the DSA and how to apply to DSA Signatory Grants

Poll: Data Sharing Agreement

1. Has your organization signed the Data Sharing Agreement (DSA)?

- Yes
- No
- I don't know if we've signed the DSA
- I'm not familiar with the DSA

2. How familiar are you with the DSA Signatory grants?

- Very familiar
- Somewhat familiar
- Not familiar



What Are Plans Saying About the DSA?

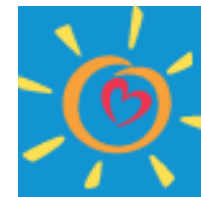


"Health Net is excited to witness the initial positive impact of the Data Exchange Framework on California's healthcare ecosystem. By encouraging providers, hospitals and health plans to leverage this unified framework, we envision a **future where population health management models dramatically improve health outcomes and the patient experience.**"

Martha Santana-Chin
Health Net

"Who doesn't hate being asked over and over again the same questions by multiple health care teams? And worse, filling in those paper forms? Why can't all that data be in one place? Well, soon it can if we all share what data we have with anyone, anywhere who needs to see it. **This is the beginning of true continuity of care and a longitudinal record.**"

Dr. Katrina Miller-Parrish
LA Care Health Plan



L.A. Care
HEALTH PLAN®

What Are Providers Saying About the DSA?

“As an organization who serves a large Medi-Cal population, the ability to take part in data sharing across provider networks is amazing. We’ve supported the DxF because we want to be part of real-time data exchange and join the network of providers who are committed to sharing analytics that improve health outcomes. **The DxF is a gift to our patients and providers... signing the DSA was just exciting.**”

Sean Atha
River City Medical Group



“Choice Medical Group are strong advocates for the California Data Exchange Framework (DxF). The DxF will empower healthcare providers to securely exchange critical patient data, leading to efficient and effective care. Value based care or individualized optimization of health cannot succeed without it. We are fervent supporters of healthcare interoperability, and the DxF allows for a major step forward. We believe this initiative can **break down data-sharing barriers** and provide healthcare providers and patients alike with countless new opportunities.”

Dr. Hemanshu Patel
Choice Medical Group

“Desert Oasis Healthcare serves a population often with complex medical histories, multiple chronic conditions and an incomplete longitudinal health record. We know patient data can become fragmented across many systems and patient encounters contributing to inefficiency, frustration and suboptimal clinical outcomes. Any **progress in contributing to a single source of truth when it comes to patient clinical data we would welcome and embrace.**”

Marc Hoffing
Desert Oasis Healthcare





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California Data Exchange Framework

Stephanie Thornton

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.



Who is Required to Sign the Data Sharing Agreement?

Required to sign by January 2023 and to exchange data beginning January 2024

- General acute care hospitals
- Acute psychiatric hospitals (100+ beds)
- Physician organizations and medical groups (with 25+ physicians)
- Skilled nursing facilities that currently maintain electronic records or electronic health information
- Health care service plans and disability insurers
- Clinical laboratories regulated by CDPH

Required to sign by January 2023 and to exchange data beginning January 2026

- Acute psychiatric hospitals (<100 beds)
- Rural hospitals (<100 beds)
- Rehab hospitals, long-term care acute hospitals, and critical access hospitals
- Physician organizations and medical groups (with <25 physicians)

Journey of Data Sharing Roadmap



Step 1

LEARN ABOUT THE DXF

Familiarize yourself with the DxF, which include the Data Sharing Agreement (DSA) and a common set of policies and procedures.

The DxF empowers health entities to provide the best possible care by creating new connections and efficiencies between health and social services entities, improving the completeness of patient records. Many health entities are required by law to take the first step to joining the DxF by signing the Data Sharing Agreement (DSA)—an agreement to share information quickly, securely, and appropriately while following a common set of terms, conditions, and obligations set forth in shared Policies and Procedures (P&Ps).

Journey of Data Sharing Roadmap



01

Step 1

LEARN ABOUT THE DXF

Familiarize yourself with the DxF, which include the Data Sharing Agreement (DSA) and a common set of policies and procedures.



02

Step 2

CHECK IF YOU'RE A REQUIRED SIGNATORY

Your organization is still encouraged to sign the DSA even if you're not currently required

The following organizations have until January 31, 2026 to begin exchange: physician practices of fewer than 25 physicians, rehabilitation hospitals, long-term acute care hospitals, acute psychiatric hospitals, critical access hospitals, and rural general acute care hospitals with fewer than 100 acute care beds, state-run acute psychiatric hospitals, and any nonprofit clinic with fewer than 10 healthcare providers. (Cal. Health and Safety Code § 130290(b)(2)).

Journey of Data Sharing Roadmap



Step 1

LEARN ABOUT THE DXF

Familiarize yourself with the DxF, which include the Data Sharing Agreement (DSA) and a common set of policies and procedures.



Step 2

CHECK IF YOU'RE A REQUIRED SIGNATORY

Your organization is still encouraged to sign the DSA even if you're not currently required



Step 3

TALK TO LEADERSHIP

Reach out to your organization's attorney, privacy officer, and IT managers to understand the ramifications of signing the DSA

Journey of Data Sharing Roadmap



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04

Step 4

SIGN THE DSA!

Join the shared commitment to providing safe, effective, whole-person care & creating a connected, healthy California for all. Sign the DSA via the **DSA Signing Portal**.

What to expect when signing the DSA:

1. Review the DSA and its policies and procedures.
2. Determine who at your organization is authorized to sign an agreement.
3. Determine if any subordinate organizations will be included.
4. Gather applicable California state license numbers and employee identification number (EIN).
5. Read the user instructions to sign the DSA.

Journey of Data Sharing Roadmap



01

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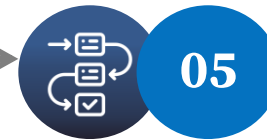


04

Step 4

SIGN THE DSA!

Join the shared commitment to providing safe, effective, whole-person care & creating a connected, healthy California for all. Sign the DSA via the [**DSA Signing Portal**](#).



05

Step 5

PLAN FOR IMPLEMENTATION

Analyze your current data sharing processes and data use agreements and determine if they need to be updated to align with the DSA

Journey of Data Sharing Roadmap



Step 6

CONNECT WITH PARTNERS

Meet with your organizational providers, health plans, and other partners that you share data with (like countries and CBOs) to understand if they've signed, what they need, and what you can both offer

Journey of Data Sharing Roadmap



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Step 7

ASSESS DATA INFRASTRUCTURE AND NEEDS

Do existing electronic health records or care management systems need updating? What about other information management systems?

Does your organization need to join a QHIO?

Do you need to update existing workflows?

USCDI v2 Summary of Data Classes and Data Elements

<p>Allergies and Intolerances</p> <ul style="list-style-type: none"> Substance (Medication) Substance (Drug Class) Reaction 	<p>Goals</p> <ul style="list-style-type: none"> Patient Goals SDOH Goals 	<p>Procedures</p> <ul style="list-style-type: none"> Procedures SDOH Interventions
<p>Assessment and Plan of Treatment</p> <ul style="list-style-type: none"> Assessment and Plan of Treatment SDOH Assessment 	<p>Health Concerns</p> <ul style="list-style-type: none"> Health Concerns 	<p>Provenance</p> <ul style="list-style-type: none"> Author Time Stamp Author Organization
<p>Care Team Member(s)</p> <ul style="list-style-type: none"> Care Team Member Name Care Team Member Identifier Care Team Member Role Care Team Member Location Care Team Member Telecom 	<p>Immunizations</p> <ul style="list-style-type: none"> Immunizations 	<p>Smoking Status</p> <ul style="list-style-type: none"> Smoking Status
<p>Clinical Notes</p> <ul style="list-style-type: none"> Consultation Note Discharge Summary Note History & Physical Procedure Note Progress Note 	<p>Laboratory</p> <ul style="list-style-type: none"> Tests Values/Results 	<p>Unique Device Identifier(s) for a Patient's Implantable Device(s)</p> <ul style="list-style-type: none"> Unique Device Identifier(s) for a Patient's Implantable Device(s)
<p>Clinical Tests</p> <ul style="list-style-type: none"> Clinical Test Clinical Test Result/Report 	<p>Medications</p> <ul style="list-style-type: none"> Medications 	<p>Vital Signs</p> <ul style="list-style-type: none"> Diastolic Blood Pressure Systolic Blood Pressure Body Height Body Weight Heart Rate Respiratory Rate Body Temperature Pulse Oximetry Inhaled Oxygen Concentration BMI Percentile (2 - 20 Years) Weight-for-length Percentile (Birth - 36 Months) Head Occipital-frontal Circumference Percentile (Birth - 36 Months)
<p>Diagnostic Imaging</p> <ul style="list-style-type: none"> Diagnostic Imaging Test Diagnostic Imaging Report 	<p>Patient Demographics</p> <ul style="list-style-type: none"> First Name Last Name Previous Name Middle Name (including Middle Initial) Suffix Sex (Assigned at Birth) Sexual Orientation Gender Identity Date of Birth Race Ethnicity Preferred Language Current Address Previous Address Phone Number Phone Number Type Email Address 	
<p>Encounter Information</p> <ul style="list-style-type: none"> Encounter Type Encounter Diagnosis Encounter Time 	<p>Problems</p> <ul style="list-style-type: none"> Problems 	

Journey of Data Sharing Roadmap



CONNECT WITH PARTNERS

Meet with your organizational providers, health plans, and other partners that you share data with (like countries and CBOs) to understand if they've signed, what they need, and what you can both offer

ASSESS DATA INFRASTRUCTURE AND NEEDS

Do existing electronic health records or care management systems need updating? What about other information management systems?

Does your organization need to join a QHIO?

Do you need to update existing workflows?

APPLY FOR DSA SIGNATORY GRANTS

QHIO and Technical Assistance DSA Signatory grants are available to support data sharing infrastructure across three funding rounds

Covered in today's webinar!

Journey of Data Sharing Roadmap



Step 6

CONNECT WITH PARTNERS

Meet with your organizational providers, health plans, and other partners that you share data with (like counties and CBOs) to understand if they've signed, what they need, and what you can both offer



Step 7

ASSESS DATA INFRASTRUCTURE AND NEEDS

Do existing electronic health records or care management systems need updating? What about other information management systems?

Does your organization need to join a QHIO?

Do you need to update existing workflows?



Step 8

APPLY FOR DSA SIGNATORY GRANTS

QHIO and Technical Assistance DSA Signatory grants are available to support data sharing infrastructure across three funding rounds



Step 9

MAKE INTERNAL CHANGES NEEDED TO EXCHANGE DATA

Make organizational infrastructure and workflow changes in preparation for data exchange.

Journey of Data Sharing Roadmap



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Meet with your organizational providers, health plans, and other partners that you share data with (like countries and CBOs) to understand if they've signed, what they need, and what you can both offer



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Step 9

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Make organizational infrastructure and workflow changes in preparation for data exchange.



Step 10

EXCHANGE DATA IN 2024

Begin exchanging data by January 31, 2023. Some entities (like practices with 25 physicians) will have until 2026.





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DSA Signatory Grants

Robby Franceschini

Two DSA Signatory Grant Opportunities

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

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

Source: June 28, 2023 CDII Webinar

Signatory Grants Updates: Round 2 Open Now

Up to \$47 million in funding will be allocated to applicants across **at least two rounds of funding**.

CDII is holding multiple rounds to balance the 2024 deadline for some organizations to begin exchanging data while ensuring that organizations with limited resources have sufficient time to complete and submit a grant application.

Estimated Dates of Each Round (May Be Subject to Change)					
Q2 2023			Q3 2023		
April	May	June	July	August	September
Expedited Rounds Open to Organizations Who Implement by 2024		Round 1			
Full Rounds Open to All Eligible Organizations			Round 2*		

*Additional rounds may be held based on application volumes and scoring in Rounds 1 & 2

Who Qualifies for DSA Signatory Grant Funding?

The following criteria apply to both the QHIO Onboarding or TA Grants

(1) Must be a DSA Signatory

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

(2) Must have an HIT Need

Signatory must demonstrate that they require technical support and capabilities to assist in meeting DSA requirements.

For Round 2+, Starting June 30, 2023

Round 2 opens the grant opportunity to most Signatories who demonstrate an HIT need, including voluntary signatories of the DSA.

DSA Grants: Funding by Organization Type

Organization Type		Funding Maximum
<ul style="list-style-type: none"> General Acute Care Hospitals Acute Psychiatric Hospitals Skilled Nursing Facilities 	Serving Underserved Communities/Geographies* <u>and</u> Did Not Receive Funding from Past HIT Funding Programs (Cal-HOP, CTAP, HITECH)	\$100,000
	Other	\$50,000
Physician Organizations and Medical Groups	Serving Underserved Communities/Geographies* <u>and</u> Did Not Receive Funding from Past HIT Funding Programs (Cal-HOP, CTAP, HITECH)	\$50,000
	Other	\$35,000
Health Insurance Plans	All	\$25,000
Clinical Laboratories	All	\$15,000
Other DSA Signatories	Serving Underserved Communities/Geographies* <u>and</u> Did Not Receive Funding from Past HIT Funding Programs (Cal-HOP, CTAP, HITECH)	\$50,000
	Other	\$25,000

Who Can Submit a Grant Application?

Eligible Signatories may choose to apply on their own, or as part of an “umbrella” application with other Signatories.

An **Applicant** is the organization that submits the Application for a DSA Signatory Grant. They can be:

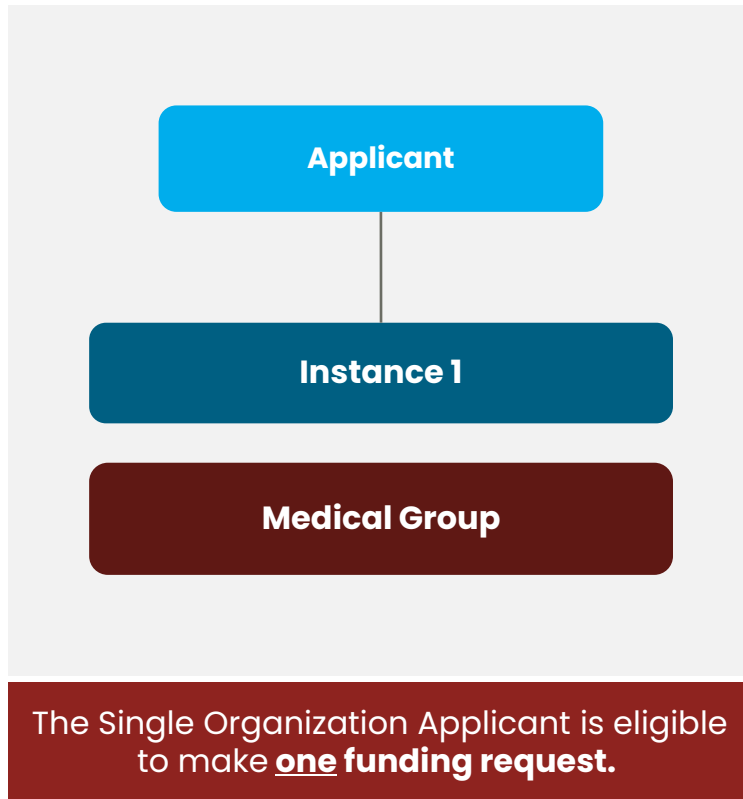
- An eligible Signatory applying on its own behalf

OR

- An organization applying on behalf of one or multiple eligible Signatories (referred to as an Umbrella Applicant).
 - Examples include a corporate parent, an Independent Practice Association, or other.
 - All Signatories included in an Application must co-sign the Application.

Funding Request Scenario 1

An Applicant with a Single Instance (EHR) and Organization



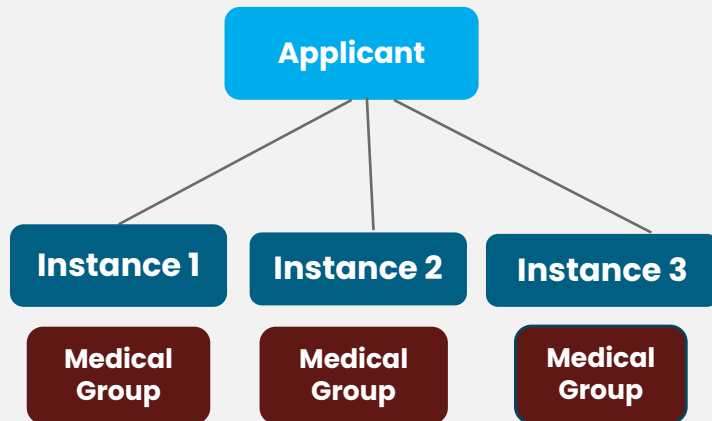
Funding Request Calculation

	Funding Max
Instance 1	\$35,000 (Base Funding)
Application Total Max:	\$35,000

Organizations that **do not** have an EHR should consider their current documentation system an instance. DSA Signatory Funding can be used to subsidize the purchase of an EHR through the TA Grant.

Funding Request Scenario 2

An IPA with Multiple Instances and Multiple Signatories



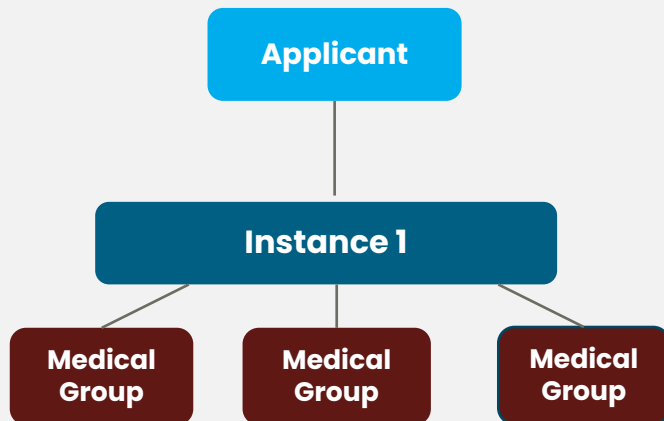
The Umbrella Org is eligible to make three funding requests.

Funding Request Calculation

	Funding Max
Instance 1	\$35,000
Instance 2	\$35,000
Instance 3	\$35,000
Application Total Max:	\$105,000

Funding Request Scenario 3

An IPA with One Instance and Eligible for Enhanced Funding*



The Applicant is eligible to make one funding request

Funding Request Calculation

	Funding Max
Instance 1	\$50,000 (Enhanced Funding)
Application Total Max:	\$50,000

*Enhanced Funding= Serving underserved communities and did not receive funding from past HIT funding programs

Get Started on the Application

After signing the DSA...

- TA Grant Applications
 - Begin your application in the [DxF Grant Portal](#)
- Qualified Health Information Organization (QHIO) Onboarding Grant Applications
 - Email grantsupport@cahie.org to begin the process
 - The California Association of Health Information Exchanges is a contractor to the Center for Data Insights and Innovation's DxF team, providing application support for all QHIO Onboarding Grant Applications



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Questions & Answers

Thank You to Our Speakers!



Stephanie Thornton
Policy Manager,
BluePath Health



Robby Franceschini
Director of Policy,
BluePath Health

Poll: After This Webinar...

How will you or your organization support the data exchange framework?

- Plan to become a signatory
- Plan to become a signatory and apply for funding
- Already signed and/or applied for funding
- I'm not sure yet



Click the blue
submit button
to complete

We're Here to Support

- Assistance with signing and submitting your grant application:
 - Email grantsupport@cahie.org
 - Attend grant-focused office hours with CDII ([registration link](#))
- Reminder of upcoming deadlines
 - Round 2 grant applications (for both QHIO and TA) **due September 1st**
- Additional Opportunities to Ask Questions
 - Open office hours w/attorney to answer DSA questions ([registration link](#))
 - First Wednesday of every month from 1-1:30 p.m.
 - Center for Data Insights & Innovation (CDII) Inbox: cdii@chhs.ca.gov

Poll: Webinar Feedback

The content of this webinar was helpful

- Strongly Agree
- Agree
- Neither Agree nor Disagree
- Disagree
- Strongly Disagree

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- Email us with questions or feedback:
cqcinfo@pbgh.org



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Thank you!

Resources

Signing the DSA:

- [Data Sharing Agreement](#)
- [DSA Signing Portal](#)
- [Signing Portal Demonstration - Webinar Recording](#)
- [Frequently Asked Questions \(FAQ\)](#)
- [“Journey of Data Sharing” infographic](#)
- (New) [Data Exchange Framework website](#)
- [Signing Organization List](#)

Applying for Funding:

- [DxF Grant Portal](#)
- [DxF Funding Opportunities Fact Sheet](#)
- [DSA Signatory Grant Guidance Document](#)

Policies and Procedures

- [CalHHS Data Exchange Framework Policy and Procedure](#)