



**California Health & Human Services Agency
Center for Data Insights and Innovation
Data Exchange Framework Information is Power Webinar Series:
The DxF Data Sharing Agreement and Policies & Procedures: An Overview
Webinar #3 Transcript (11:30 AM – 12:30 PM PT, November 22, 2022)**

The following text is a transcript of the November 22nd Data Exchange Framework Information is Power Webinar Series: *DxF Grant Program Overview & DSA Signature Portal Demonstration*. The transcript was produced using Zoom's transcription feature. It should be reviewed concurrently with the recording – which may be found on the CalHHS Data Exchange Framework website to ensure accuracy.

[John Ohanian] 14:31:20

new programs that we're developing to support. all the implementation efforts for your ongoing reference.

[John Ohanian] 14:31:26

Each of these webinars is recorded and posted to our CalihS State exchange framework website along with the presentation slides today's presentation, we're going to be focusing on the data exchange framework

[John Ohanian] 14:31:38

Grants program and provided a demonstration of the data sharing the agreement signature portal.

[John Ohanian] 14:31:45

If we can go to the next slide, please. we have 2 esteemed colleagues joining us to present today, Robert Jordan.

[John Ohanian] 14:31:53

See your consultant with mozars and juliet Allen, a senior manager with my app calls so quick recap of our agenda.

[John Ohanian] 14:32:03

We're gonna be starting guys, sharing our vision for data exchange in California as well as highlighting a study that shows the importance of data exchange.

[John Ohanian] 14:32:11

We're going to provide an update on a few of the items we've been working on since our last webinar. with respect to implementation of the data exchange framework.

[John Ohanian] 14:32:20

We're then going to take a deep dive into the grants program, describing what it is what's the components and what's coming next?

[John Ohanian] 14:32:27

As well as we'll close with a steep peak of how to sign the data sharing agreement in the signature portal.

[John Ohanian] 14:32:34

There'll be a few minutes for q a at the end so please enter your questions using zoom's Q A feature, and we'll do our best to answer as many as we can during this webinar.

[John Ohanian] 14:32:43

Otherwise we'll get back to you shortly after next slide, please, and the next one.

[John Ohanian] 14:32:50

So our vision for every California and the healthy image services providers and organizations that care for them that they will have timely and secure access to usable electronic information that's needed to address their health and social needs and

[John Ohanian] 14:33:04

enable the effective and equitable delivery of services to improve their lives and well-being.

[John Ohanian] 14:33:11

So thanks for being a part of this journey that we have together.

[John Ohanian] 14:33:14

Next slide, please. So I wanted to highlight a study that ties nicely with this focus of the webinar today.

[John Ohanian] 14:33:24

The study not only shows the potential for good health information exchange to improve patient outcomes by reducing emergency department visits hospital re-admissions, but it also emphasizes the crucial role of

[John Ohanian] 14:33:37

training and technical assistance for providers delivering services.

[John Ohanian] 14:33:41

All along. we knew that training and technical assistance especially for smaller or under resource providers would be a key to ensuring the success of the data exchange framework, and this is why, under the grants program we're we're

[John Ohanian] 14:33:55

deploying grants devoted especially to education and technical assistance.

[John Ohanian] 14:33:59

So we look forward to discussing this more both but you'd find this of interest, and again, you can refer to the slides next slide.

[John Ohanian] 14:34:08

Please. So a quick update since the last information is power webinar that we had on October 20 fourth implementation Advisory Committee met on November second.

[John Ohanian] 14:34:20

I'm sorry November third and discuss the next set of Pmps, which are our policies and procedures.

[John Ohanian] 14:34:27

The data exchange framework qualified health information organization program, the data exchange Grants program and the strategy for digital identities, a lot of works being done behind the scenes and between these webinars we hosted our second

[John Ohanian] 14:34:41

Dsa. Pmp. Subcommittee meeting, at which the subcommittee discussed and provided recommendations on draft language for the information, blocking and monitoring and auditing policies and procedures

[John Ohanian] 14:34:54

Cdi has received applications for the data exchange framework, educational initiative on grants. it grants.

[John Ohanian] 14:35:03

On October the 30 first and as always there's more information on these and other data exchange framework implementation activities on our website.

[John Ohanian] 14:35:10

So with that i'm going to turn It over to Juliet, to go over our Grants program.

[Juliette Mullin] 14:35:16

Wonderful. Thank you, John. i'm thrilled today to have an opportunity to share some highlights about the data exchange framework.

[Juliette Mullin] 14:35:22

Grant program will be going through an overview today of the program and then sharing some key updates on the design of each of the key domains in the program Next slide.

[Juliette Mullin] 14:35:31

Please. So let's begin at the beginning. How did this Grant program come to be on the California Governor and State legislature in the 2,022, 2,000, and 23, and California State budget allocated 50

[Juliette Mullin] 14:35:44

1 million dollars over 2 years to support the implementation of the data exchange framework

[Juliette Mullin] 14:35:52

And to be a little bit more specific. The funding establishes the data exchange Framework Grant program which provides funding to external entities to support a number of activities, some of which are listed here on the

[Juliette Mullin] 14:36:01

slide and include health information exchange onboarding for organizations who do not actively share information through health information intermediaries.

[Juliette Mullin] 14:36:09

Today technical assistance for small under resource providers, technical assistance and education for organizations who are new to health, information and change, especially those who are required by Ab.

[Juliette Mullin] 14:36:21

133 to sign the data sharing agreement.

[Juliette Mullin] 14:36:23

So this is a sample of the technical assistance and implementation support activities.

[Juliette Mullin] 14:36:29

That the California State Legislature and Governor provided funding, provided this funding to support next slide.

[Juliette Mullin] 14:36:36

Please. So given this broad ability to provide support and implementation to the field to implement the data change framework, Cbi has defined the Grant program across 3 primary domains.

[Juliette Mullin] 14:36:50

So what that means is that over the coming months and year Cvi.

[Juliette Mullin] 14:36:53

Will be awarding grants across 3 primary domains, so it intends to award grants on the educational initiative grants.

[Juliette Mullin] 14:37:02

So these are grants that provide grant funding to associations for educational initiatives designed to provide information about the data exchange, framework and data and the data sharing agreement for signatories.

[Juliette Mullin] 14:37:13

The second core Grant domain is Qh. i. o. onboarding brands.

[Juliette Mullin] 14:37:18

So these are grants that provide funding to Qh. ios.

[Juliette Mullin] 14:37:21

And signatories for the initial cost of connecting to a qualified hio, and then the third grant domain.

[Juliette Mullin] 14:37:27

Here is technical assistance grants, and these provide grant funding to signatories for technical assistance to support signatories in meeting their Dsa. requirements.

[Juliette Mullin] 14:37:37

Beyond Qh. lo. onboarding we're gonna spend the majority of our time today, really diving into each of these individual domains, fully explaining them and sharing where we are in our current process of designing each of these

[Juliette Mullin] 14:37:48

grant next slide, please. As we are dividing each of these grant domains, there are 3 core program goals that are really driving the entire design and implementation of the Grant program. The first is Cdi.

[Juliette Mullin] 14:38:07

It's focused on ensuring that we're elevating equity and supporting dxf implementation among signatories and under resource geographies.

[Juliette Mullin] 14:38:15

Or signatories who are serving historically marginalized population and underserved communities.

[Juliette Mullin] 14:38:21

This is the core principle, and we'll talk a little bit about how we're in weaving that into the design of the program. and in storing that it drives implementation and administration of the program the second core program goal

[Juliette Mullin] 14:38:32

listed here is that the program is really focused on addressing the significant barriers to get the implementation of the data exchange framework.

[Juliette Mullin] 14:38:41

See those operational barriers, technical barriers or others. and really focused on understanding what those barriers are for signatories, and how we can leverage grant funding to address those barriers.

[Juliette Mullin] 14:38:51

And we're going to talk a lot about how we're doing that in a moment. And then the third core goal that's driving the design of the program is really ensuring that we're aligning this program with other grant

[Juliette Mullin] 14:39:03

programs and that we're promoting activities that have been ineligible for funding by other grant programs either in the past or in in current grant programs that are happening now are being designed Now, and we'll talk a little bit

[Juliette Mullin] 14:39:16

about that as well. so with that we'll go to the next slide, and we'll start to dive into the details. So

[Juliette Mullin] 14:39:23

What i'd love to share first is a little bit about how we are building out the program to address barriers.

[Juliette Mullin] 14:39:29

So in order to really understand what those barriers are for signatories, and how Grant funding might help address those barriers. Ebii, in October hosted listening sessions that really allowed us to gather information from

[Juliette Mullin] 14:39:42

the field about how a Grant program may support implementation so we're gonna explain what that session covered.

[Juliette Mullin] 14:39:48

And everything we learned on the upcoming slides. So next slide, please.

[Juliette Mullin] 14:39:54
So first of all, as a broad overview I noted

[Juliette Mullin] 14:39:56
We hosted 2 sessions in October.

[Juliette Mullin] 14:39:59
With these sessions we really thought to understand barriers, to implementation for signatories, and then to identify opportunities for addressing those barriers.

[Juliette Mullin] 14:40:10
So the format for for anyone who's joining us today who was not able to join these Grant listening sessions.

[Juliette Mullin] 14:40:15
The format was a session that was hosted virtually and we provided participants.

[Juliette Mullin] 14:40:20
The opportunity to provide written and verbal feedback throughout the session. on a series of questions i'll show you on the next slide.

[Juliette Mullin] 14:40:28
In terms of participants. Across the 2 sessions we had 320.

[Juliette Mullin] 14:40:35
6 participants attended the largest kind of grouping of which were a participant from county health, social services, and public health.

[Juliette Mullin] 14:40:42
But we saw a wide range of different types of health and human services.

[Juliette Mullin] 14:40:46
Provider organizations who joined and provided their insight onto their implementation process.

[Juliette Mullin] 14:40:53
Some of the barriers there they foresee, and how grant funding they support

[Juliette Mullin] 14:41:00
So in this session we ask 3 core sets of questions, and we really spent a good, a good portion of time on each question, gathering feedback from participants, both verbally and through a polling software and We ask

[Juliette Mullin] 14:41:14
participants to share. First of all, what are the operational, technical, or technological barriers for your organizations to implement the data, exchange, framework?

[Juliette Mullin] 14:41:23
Second of all, how might the excel Grants help address those barriers?

[Juliette Mullin] 14:41:28

And then, thirdly, how might we make it easier for your organization to apply for our grant program kind of in the in the general overall administration of the program.

[Juliette Mullin] 14:41:35

So you can see this series of problems is really designed in helping us.

[Juliette Mullin] 14:41:39

So in on our program goal around addressing barriers the findings from the lessoning session bam 3 core scenes which you'll actually know ended up matching quite well to the domains that we've been developing

[Juliette Mullin] 14:41:51

for this program. So the first was some knees around education and knowledge stuck in with some needs around.

[Juliette Mullin] 14:41:59

Qh. a onboarding, and the third was technical assistant So let's walk through each of these next slide, please.

[Juliette Mullin] 14:42:07

So on the educational theme. we heard from participation from participants about a number of core barriers.

[Juliette Mullin] 14:42:14

There were a number of participants that shared, that there is a general lack of understanding about what was required of their organization specifically in order to be in to meet their requirements and their under the data exchange for we heard

[Juliette Mullin] 14:42:29

some comments from organizations who share it. They have a general lack of understanding about what a Qh.

[Juliette Mullin] 14:42:34

lo is what the role of a Qh lo is, and if you are not familiar with what a Qh.

[Juliette Mullin] 14:42:39

lo is, we will cover that in a few slides So we'll get to that in a moment as well in terms of grant opportunities.

[Juliette Mullin] 14:42:48

Participants, really surfaced, that there was a really big opportunity for the Grant program to be supporting educational and training opportunities about the date exchange framework.

[Juliette Mullin] 14:42:57

This would include providing resources to learn about the date exchange framework like toolkits, guides, etc.

[Juliette Mullin] 14:43:03

There was a kind of a request for clear, and specific guidance and scope for each stigmaty work group group required to comply, and information on how to become a curious, so that's our general findings on education and i'll

[Juliette Mullin] 14:43:16
share in a few slides. How we're implementing those in the execution initiative, Grant domain in a moment.

[Juliette Mullin] 14:43:21
Next slide, please, across Qh ios We heard that many of the organizations who participated in the listening session were not connected to a health information organization or intermediary that actively Exchanges data so in

[Juliette Mullin] 14:43:36
terms of barriers. that was surface as a barrier to high level, and then also kind of as a connected barrier for organizations who might look to connect to a Qh lo to meet their their data

[Juliette Mullin] 14:43:47
exchange requirements. Some participants surface that there would be a need to adjust existing technologies and workflows to support the connection to a Qh lo.

[Juliette Mullin] 14:43:57
So in terms of grant funding opportunities there really surface the importance of providing funding opportunities to support the onboarding to a Qh.

[Juliette Mullin] 14:44:05
I and associated activities with that person next one and finally

[Juliette Mullin] 14:44:13
We learned a lot from participants in the Grant session about some of the barriers that they see in terms of technical assistance that they might need.

[Juliette Mullin] 14:44:20
And then we heard from them about grant opportunities to support that technical assistance. So i'm not gonna read through everything on this slide, and we'll be making any slides available online. but want to highlight a couple pieces

[Juliette Mullin] 14:44:32
here. some of the implementation barriers surface in this category included, not having key experts within the organization who could help them select the A qatio option or other technical solution to support their data exchange framework

[Juliette Mullin] 14:44:45
obligation. We also heard that there were organizations who felt that they didn't have the resources to gather a clear understanding of their technological gaps.

[Juliette Mullin] 14:44:56
And what they would need to address in order to meet their Dsa responsibilities.

[Juliette Mullin] 14:45:01
In terms of grant funding opportunities. It really highlighted the importance of providing funding for organizations to hire experts or consultants.

[Juliette Mullin] 14:45:11

To be able to do things like elect and contract with a few hio or other technical solution, to be able to do gap analyses and to be able to support workflow development and staff training in service of events of achieving the your

[Juliette Mullin] 14:45:25

Dsa. requirements. So next slide please so at a high level, and we're taking each of these core scenes and everything we learned from the listening sessions, and really weaving them into the design of the grant program across all

[Juliette Mullin] 14:45:41

3 domains. We also heard from at a high level from participants, that there is a big need to really make sure that the Grant program in its broad administration establishes really clear grant criteria and requirements that would be easy

[Juliette Mullin] 14:45:57

for organizations to interpret and act on to provide sufficient time to complete and vet applications through organizations.

[Juliette Mullin] 14:46:07

And then a really big call to make the application process, the work, and the reporting requirements as simple as possible.

[Juliette Mullin] 14:46:12

As we go through our coming slides here, talking about each of the individual domains, and where we are with those designs throughout, we are really thinking about how we can leverage, and how we can, implement some of the buildings that we got from the from

[Juliette Mullin] 14:46:25

the Grant listening sessions to make sure that we are designing a program that meet stakeholders next slide.

[Juliette Mullin] 14:46:30

Please. We'll begin with the educational initiative grants so here

[Juliette Mullin] 14:46:39

This, the educational initiative grants at a high level are really designed to address the barrier that follows.

[Juliette Mullin] 14:46:44

So data change, framework, signatories. may need stakeholders specific support to understand their Dfa responsibilities and how to fulfill those responsibilities.

[Juliette Mullin] 14:46:53

So we've already sort of given you the overview of what we heard from the listening session there make a big piece.

[Juliette Mullin] 14:46:58

I would highlight that we heard from the listening session with the need for the stakeholder.

[Juliette Mullin] 14:47:04

Specific education in this space. As a result, Cdi is funding data exchange framework related as you can provide education and informational activities for data exchange framework signatories and that are tailored by

[Juliette Mullin] 14:47:19
symmetry group. the eligible Awardees.

[Juliette Mullin] 14:47:22
In this Grant domain are associations who represent signatories and associations that have expertise in providing education, education, and technical assistance.

[Juliette Mullin] 14:47:34
You can see here are some of these sample activities that might be included under this domain.

[Juliette Mullin] 14:47:37
They include things like webinars, coaching hours, learning, collaborative, etc.

[Juliette Mullin] 14:47:42
Next slide, please. So in terms of the timeline for this grant

[Juliette Mullin] 14:47:50
Organizations submitted their applications for this grant.

[Juliette Mullin] 14:47:52
At the end of October. and so Cdi is currently reviewing and finalizing decisions on those grant awardees.

[Juliette Mullin] 14:48:00
So we will be on cbi plans to publicly announce the notice of awards in the cunning weeks stay tuned.

[Juliette Mullin] 14:48:07
We'll be sharing that out through the Dxf community listener and other events hosted by Cdi in the coming weeks.

[Juliette Mullin] 14:48:15
A slide, please. So next in our domains it's the qatio onboarding program, So let's go through the next slide, please.

[Juliette Mullin] 14:48:26
So the Qato onboarding grants This Grant domain is really intended to address one of the barriers I noted from the Grant listening session, which is that a lot of potential signatories of the

[Juliette Mullin] 14:48:37
Dsa. have not yet made the necessary connections to intermediaries to enable meaningful data.

[Juliette Mullin] 14:48:43
Exchange. So what is an hio? You might be wondering so.

[Juliette Mullin] 14:48:46

A health information for organization is an organization that offers services and functions to support the exchange of health information.

[Juliette Mullin] 14:48:54

An Aio served as an intermediary, assisting health and human services.

[Juliette Mullin] 14:48:59

Organizations as they initiate, receive, and reply to request for information.

[Juliette Mullin] 14:49:03

In current regional Hios exchange data with only about half of the safe hospital.

[Juliette Mullin] 14:49:10

So that really highlights that there is a need here to begin supporting signatories to really support signatories and getting to Oh, if that is the technical solution that they choose to to meet their Dsa requirements in terms of

[Juliette Mullin] 14:49:23

the one of the big barriers here costs can be a big challenge for organizations and onboarding to an hio, and so Cbi will be providing grants to cover the initial cost of that according to a

[Juliette Mullin] 14:49:33

qualified Hia, we could go to the next slide, please.

[Juliette Mullin] 14:49:38

You may be wondering how will a signatory identify a qualified hio in 2023 Cdi.

[Juliette Mullin] 14:49:43

I will establish a qualified health information organization program to help signatories meet their obligation funds or the date exchange for work in 8,133.

[Juliette Mullin] 14:49:52

So a Qh io is an hio that has demonstrated their ability to meet to the Dxf.

[Juliette Mullin] 14:49:59

And Dsa data exchange requirements as part of data change, framework, implementation.

[Juliette Mullin] 14:50:06

Cdi. I will establish these criteria, as well as a process for qualifying h ios to validate their credentials and to validate that they are meeting those criteria as an important note though signatureies are

[Juliette Mullin] 14:50:17

not required to connect to a Qh io. So qaitos are an option for signatories to support them in meeting their Dsa.

[Juliette Mullin] 14:50:25

Requirements that they are not required. So how will this application process work?

[Juliette Mullin] 14:50:33

At a high level, A. to receive a 2 retail onboarding grant.

[Juliette Mullin] 14:50:37

An organization will first select a Q. H. I. O. and that 2 asio will apply to Cdi for the brand on their behalf.

[Juliette Mullin] 14:50:45

So if we take that and kind of a step-wise approach here, the first step would be the signatory, select the Qh.

[Juliette Mullin] 14:50:50

lo that they want to connect with, and the organizations find attentive connection agreement.

[Juliette Mullin] 14:50:56

The second step would then be that the Qh lo.

[Juliette Mullin] 14:50:59

Screens the signatory to see if they are eligible for Qh.

[Juliette Mullin] 14:51:00

I. O. on boarding Grant per the criteria, and also to note an important aspect.

[Juliette Mullin] 14:51:06

Here is that eligibility criteria. are still being defined. I'll talk a little bit later in this presentation about how you can say up to date on that information.

[Juliette Mullin] 14:51:16

If the Qao. does the screening and find that the signatory is eligible, they will get the signatories post signature and submit a grant application to Cdi on the signatories behalf So with that See

[Juliette Mullin] 14:51:29

with that signatory approval, and their co signature of the application. if approved for grant funding Cdi.

[Juliette Mullin] 14:51:37

I will release the funding to the Q. H. I. O. When the signatory and the Qh Al.

[Juliette Mullin] 14:51:41

Reach predetermined onboarding masters. This gives you a very high level.

[Juliette Mullin] 14:51:45

Understanding of what the application process might look like for Q.

[Juliette Mullin] 14:51:50

Aos I will highlight at this moment you'll see noted at the top of the slide here, and I want to highlight this across all of the poor elements we're going to cover in the coming slides the the

[Juliette Mullin] 14:52:00

parameters, and the criteria that we're outlining here.

[Juliette Mullin] 14:52:02

First of all, they're. they're not comprehensive so there will be more elements that will be sharing as those become available, and they are subject to change.

[Juliette Mullin] 14:52:09
So this is giving you an overview of the intense for Cdi I.

[Juliette Mullin] 14:52:15
In the application process. But this is still being finalized and We'll share more about about when we'll be sharing that final information.

[Juliette Mullin] 14:52:23
Next slide. So what are the funding parameters?

[Juliette Mullin] 14:52:28
So the first thing to know is, Cdi does expect to provide maximums for funding requests. So what will the maximum see?

[Juliette Mullin] 14:52:36
Maximums, or essentially we will provide the and We will be very specific about specifying the largest amounts that each organization can apply for through the Qh lo. onboarding, ground so we'll tell you

[Juliette Mullin] 14:52:49
you can apply for up to x amount for the qato onboarding Grant.

[Juliette Mullin] 14:52:53
The expectation is that Cdi will set those funding maximums by signatory groups, and Cdr is leveraging.

[Juliette Mullin] 14:53:01
Funding amounts that in previous Grant programs to inform on the approach for this program.

[Juliette Mullin] 14:53:07
A second big note around the funding parameters is that Cdi expects to release funding based on milestones.

[Juliette Mullin] 14:53:14
So the Grant administrator would release funding to the Qh.

[Juliette Mullin] 14:53:17
Ao, based on the achievement of simple milestones.

[Juliette Mullin] 14:53:21
And I want to highlight simple. Here we definitely heard in the Grant listening session the importance of providing straightforward and simple processes.

[Juliette Mullin] 14:53:27
And so we are weaving that into how we think about the milestone.

[Juliette Mullin] 14:53:30
So the Graphic, it right illustrates potential milestones for this program. The milestones are not yet finalized, but this gives you a sense of kind of how those milestones might work next slide.

[Juliette Mullin] 14:53:45

Please. So our third and final domain to cover today is the technical assistance Grant domain.

[Juliette Mullin] 14:53:49

Next one. So technical assistance. Grants are really intended to support organizations in meeting their data change requirements through implementation activities beyond Qh lo onboarding.

[Juliette Mullin] 14:54:01

So what are the core barriers that we're focused on addressing here?

[Juliette Mullin] 14:54:05

The first is that organizations who choose to onboard to a Qh.

[Juliette Mullin] 14:54:09

lo may need resources to help select or contract with that.

[Juliette Mullin] 14:54:12

Qh I o Or they may need resources to support the meaningful integration of shared data into technological, operational, and clinical workflows in their organization.

[Juliette Mullin] 14:54:23

The second court area is that organizations may choose to meet their Dsa. requirements without onboarding to a Qh.

[Juliette Mullin] 14:54:29

lo, and they may need resources to support implementation of their selected solution.

[Juliette Mullin] 14:54:33

So this technical assistance Grant is intended to address both of those barriers by by providing funding to support access activities, to address both of those barriers

[Juliette Mullin] 14:54:46

So as in terms of the application process. this one looks a little bit different.

[Juliette Mullin] 14:54:51

To receive a technical assistance. Grant organizations will apply directly to Cvis Grant, administrator for funding

[Juliette Mullin] 14:54:57

So again, looking at the stepwise approach here and again, this is kind of the tentative thinking, preliminary thinking.

[Juliette Mullin] 14:55:04

Right now a Cdi. and may be subject to change when final criteria are released.

[Juliette Mullin] 14:55:09

But But right now the thinking about the steps is that in step one the signatory would identify a technical assistance need to help them meet their Dsa requirements, and a vendor that could help address that need in step 2 the signatory would review

[Juliette Mullin] 14:55:24

the Ta Grant criteria to see if they are eligible for a ta grant and then, if they are eligible, submit an application for technical assistance funding, and then in step 3 if approved for grant fronting

[Juliette Mullin] 14:55:35

Cbi, I would release funding to the signatory when the signatory and vendor reach predetermined milestones.

[Juliette Mullin] 14:55:40

So if we go to the next slide we'll see here again, the funding parameters for this Grant domain looks like very similar for the Qh lo.

[Juliette Mullin] 14:55:50

Grant domain so similarly to the Qh. lo. grant domain Cdi.

[Juliette Mullin] 14:55:53

To provide maximums for funding requests to support notorious and similarly to the Qh. lo.

[Juliette Mullin] 14:55:59

Onboarding. Grant Cdi expects to release funding based on milestones.

[Juliette Mullin] 14:56:03

And again, we're focused on setting simple milestones that we can use to ensure that the program is easy for signatories to be able to apply for and receive funding from next slide.

[Juliette Mullin] 14:56:20

Please. So that gives you a very high level sense of How we're designing each of the 3 grant domains.

[Juliette Mullin] 14:56:25

I know we're moving through this very quickly I want to make sure I cover kind of the last couple pieces here, and then we'll share a course how to stay up to date on developments as the the design of the program progresses So in this next section

[Juliette Mullin] 14:56:39

I want to share a little bit about how Cdi is ensuring that we are developing an application process and selecting criteria for the grant program that is designed to ensure equitable access to and distribution of grant funding next slide

[Juliette Mullin] 14:56:51

please. So throughout our application processes and the design of the grant program as as identified in one of our core program goals, Cdi is really focused on ensuring that that the we are supporting the implementation of the data exchange

[Juliette Mullin] 14:57:09

for mark in areas that support under resource geographies historically marginalized populations and underserved community.

[Juliette Mullin] 14:57:18

And we're doing that in a number of ways a few of which are highlighted here.

[Juliette Mullin] 14:57:22

So the first is in the educational initiative brand we'll note that the educational initiatives will include specific activities and efforts to reach signatories that serve under resource geographies, historically marginalized

[Juliette Mullin] 14:57:34

populations and underserved communities in the 2 Aio Onboarding and T. A.

[Juliette Mullin] 14:57:37

Grants. The application process will be designed to ensure that organizations with limited capacity and bandwidth are able to easily apply and access funding.

[Juliette Mullin] 14:57:47

So we've already spoken a little bit to how we're ensuring simple processes throughout this presentation, and we'll be sharing more about how we're weaving that into the application process as we really details of

[Juliette Mullin] 14:57:58

the application itself in the coming months. so and finally on the slide i'll note that Cdi is also in its scoring criteria, ensuring that organizations who serve under resource geographies marginalized communities

[Juliette Mullin] 14:58:11

and and the underserved communities are prioritized in the scoring criteria and are able to access funding.

[Juliette Mullin] 14:58:21

Next slide, please. That gives you a sense of some of the ways in which Cdi is ensuring that is, is built into each element of the program design.

[Juliette Mullin] 14:58:31

And again, as I noted we'll continue to share ways in which that is being built into each element of the program.

[Juliette Mullin] 14:58:39

As we release details of each element of the program. The final program goal is ensuring alignment with other grant programs and want to share a little bit with you.

[Juliette Mullin] 14:58:48

How, how we're approaching that so next slide please So Cdi is coordinating with the Hcs.

[Juliette Mullin] 14:58:56

And other departments across the State of California to ensure the alignment of the data exchange Grant program with other funding opportunities for health.

[Juliette Mullin] 14:59:05

It, and data exchange under the Dhcs umbrella, for example.

[Juliette Mullin] 14:59:11

These include ensuring alignment with funding opportunities through the Cal aim, providing access and transporting health program or paths.

[Juliette Mullin] 14:59:19

And this is a program really designed to help build capacity and infrastructure to implement Cal aim.

[Juliette Mullin] 14:59:27

I Won't read through everything on this slide again here.

[Juliette Mullin] 14:59:30

This will be shared on the website. but this is the core grant program that we're staying aligned with Vhs on and identifying opportunities for coordination and alignment.

[Juliette Mullin] 14:59:39

Another graph program is one that is, that was included in the 2,000 and the 2022, 2023 California budget, and that is the equity and practice transformation.

[Juliette Mullin] 14:59:50

Brand These grants will support investments in price, provider infrastructure, and 200 million dollars of that funding will be dedicated to work for preparing practices for value-based care including supporting necessary

[Juliette Mullin] 15:00:03

infrastructure, such as health Ehr systems that support population, health management, including population, health analytics and services, data collection and recording capabilities, improve data exchange and care management systems.

[Juliette Mullin] 15:00:17

And so we are working with dhcs to stay aligned on the development of that program and the data exchange framework program, and we'll continue to share updates across all of the funding opportunities as those become

[Juliette Mullin] 15:00:28

available next slide, please. So what's messed in terms of that set for the program next slide.

[Juliette Mullin] 15:00:37

So what applicants can expect in 2023 is that Cdi I.

[Juliette Mullin] 15:00:43

As we get closer to this timeline we'll announce specific funding rounds and opportunities for 2,023

[Juliette Mullin] 15:00:51

And so, the expectation is that those application rounds will open in early 2023, and will share precise dates as those become more concrete and available to share to support the need for a rapid implementation cbi doesn't

[Juliette Mullin] 15:01:06

tend to prioritize initial rounds of grant funding for requires signatory groups, and this is really to ensure that those organizations are supported in meeting their data exchange requirements in a timely fashion those

[Juliette Mullin] 15:01:19

organizations who are required to sign the data change framework under 81, 33 are listed here and will not read them, but they are there for you to review.

[Juliette Mullin] 15:01:32

So finally, in terms of our timeline there's lots in flight right now.

[Juliette Mullin] 15:01:36

We already noted that the Educational Grant initiatives will be announced in the coming weeks in terms of what to expect for the Q.

[Juliette Mullin] 15:01:42

A. I onboarding grants and the technical assistance grants.

[Juliette Mullin] 15:01:48

Our intent is to release additional details about the Grant criteria in the coming months.

[Juliette Mullin] 15:01:51

So in December and January will be released in additional details.

[Juliette Mullin] 15:01:54

This has become available. and the intent is to release the application materials for the for those 2 grant domains.

[Juliette Mullin] 15:02:01

In quarter. one is next year. These timelines that just want to note are subject to change, and we will continue to communicate these timelines and and more specific dates around these timelines as those available and I believe that brings me to my

[Juliette Mullin] 15:02:23

last slide next slide. how can you say up to date this program is being designed currently in real time, and so we want to make sure that you're able to say up to date on the criteria?

[Juliette Mullin] 15:02:30

The eligibility information, the application information as that is finalized and released to the public. and the best way to stay up to date on that is to make sure that you are signed up for the date exchange framework.

[Juliette Mullin] 15:02:45

Community email distribution. You are not already signed up for the distribution. And you want to hear all of the updates about the grant program, and say, to come available and create you to email Cbi at hey?

[Juliette Mullin] 15:02:55

Ts dot, c. i dot com to be added to the distribution list next slide, and I believe that wraps for my section.

[Juliette Mullin] 15:03:04

Thank you very much, and we look forward to sharing additional essays about the Grant program as those become available in the coming weeks and month

[Robert Jordan] 15:03:13

And the next slide, please. Speaking of the Dsa and who's most assigned, and when and how Cdi has created a self-service portal that will allow people to sign the Dsa electronically that's going to

[Robert Jordan] 15:03:33
be an out shortly, and i'm going to show you a demonstration in a couple of minutes.

[Robert Jordan] 15:03:39
The important takeaway from this side is, it starts with some prior preparation, determining who within your organization will sign the Dsa.

[Robert Jordan] 15:03:51
What subordinate entities, organizations, or facilities will this person sign for?

[Robert Jordan] 15:03:56
And a signatory is that notes here can sign on behalf of multiple subordinates.

[Robert Jordan] 15:04:02
So they don't always have to Go individually and then third, The key information is very simple.

[Robert Jordan] 15:04:08
It's going to be either the employer identification number or it's going to be the little license of regulatory agency to that organization here in California and of course, some typical information like mailing

[Robert Jordan] 15:04:25
addresses, next slide, please.

[Robert Jordan] 15:04:31
Note, too, that while we're going to announce availability next week, it's time to start reading the Dsa. and the policies and procedures. if your organization needs to do a legal review of these now is the time

[Robert Jordan] 15:04:44
to do it, because there will be no changes allowed to the Dsa.

[Robert Jordan] 15:04:49
Since everything was designed by the legislature and the law.

[Robert Jordan] 15:04:55
So get a look at those before it's time to sign as well next slide, please.

[Robert Jordan] 15:05:01
There was an earlier question and an earlier slide on the required signatories.

[Robert Jordan] 15:05:07
You'll notice this slide says type type is one of the important things that you will enter when you sign the Dsa.

[Robert Jordan] 15:05:16

What is my type, And then, second is going to be my license number. You'll notice that, except for number 2, the physician organizations everything on here is regulated by the State, and has a license either from the

[Robert Jordan] 15:05:31
Department of Public Health managed care Dhcs

[Robert Jordan] 15:05:36
So, finding the license is going to be a key element of this notice at the bottom.

[Robert Jordan] 15:05:43
We've had questions. counties public health social services they're not required signatories, but they are allowed to sign, in fact, encouraged to sign the Dsa. also note the asterisk at the very bottom and the fine

[Robert Jordan] 15:05:59
print. The legislation did not define. What is a physician, organization, or a medical group?

[Robert Jordan] 15:06:07
There will be on the Cdi website, along with a link to this next week.

[Robert Jordan] 15:06:14
An Faq. that describes to the best of our ability who should be signing, and what the the criteria for that would be so. let me show you without further ado a quick view

[Robert Jordan] 15:06:35
It says I have to go over your slide, Mario

[Robert Jordan] 15:06:40
When you go to the the link from the cdi website once posted, it'll take you to this kind of landing page where you can register and begin your signing process registration is very straightforward.

[Robert Jordan] 15:06:56
If you already have an account, you can sign in or to create an account you simply put in your email address as the contact.

[Robert Jordan] 15:07:07
Who's responsible for the organization, develop a password your name, your organization, job, title, and phone number and then create the account very straightforward.

[Robert Jordan] 15:07:18
The organization is the legal business name of the either the individual entity that you're going to sign for or the umbrella organization.

[Robert Jordan] 15:07:32
Now let me go back to the beginning here and sign in with one that's already created

[Robert Jordan] 15:07:48
And this is the landing page. You'll Notice my name is up here.

[Robert Jordan] 15:07:52



My name is Robert Edmund i'm an executive assistant in this particular organization, and soon as I can move my black bars at the top

[Robert Jordan] 15:08:13

The key tab. Here is my organizations notice that There's a help.

[Robert Jordan] 15:08:19

Tab help has got user instructions. Step by step.

[Robert Jordan] 15:08:22

This complements. the Faq that's posted on the Cdi website, also for my organizations.

[Robert Jordan] 15:08:31

I can view the Dsa. I can download. I can hand it to my legal department.

[Robert Jordan] 15:08:38

I can read or reread it

[Robert Jordan] 15:08:47

And I can also go to the Cdi Web Page and I can see the the policies and procedures.

[Robert Jordan] 15:08:57

Now when I logged in as the executive assistant, I entered the name Lost Hills Regional Medical Center, and when I did that I entered certain details of it.

[Robert Jordan] 15:09:10

That name carried over from my original entry but now that it's here.

[Robert Jordan] 15:09:16

I can add other things. Do I have subordinate organizations it's a yes, no question.

[Robert Jordan] 15:09:22

My answer is yes. When I said yes immediately the type, the employee identification number, and the license number.

[Robert Jordan] 15:09:31

Nothing was required. so we leave those blanks since i'm an umbrella organization mailing address is all straightforward on the right.

[Robert Jordan] 15:09:41

My choice was well, I sign myself, or with another I indicated other.

[Robert Jordan] 15:09:46

In that case it popped up this information so I can put in my CEO's name email phone number and title. The email.

[Robert Jordan] 15:09:56

Is important here, because that's where the dsa will go for the signature

[Robert Jordan] 15:10:04

Back to my organizations. I have 4 subordinate organizations that I've already created, and I created them by simply clicking on this button.

[Robert Jordan] 15:10:17

Here. I happen to have myself listed here, Remember lost those regional Medical Center.

[Robert Jordan] 15:10:22

I'm an acute care hospital, but I have all these other entities.

[Robert Jordan] 15:10:30

So I left license and type blank earlier, so I can enter it here.

[Robert Jordan] 15:10:33

I am an acute care. Hospital here's my license number here's my address, and of course, my favorite button save my second favorite back to my organizations.

[Robert Jordan] 15:10:47

I have a medical group that's associated with me I entered the name of the medical group.

[Robert Jordan] 15:10:54

I selected from the type that they're a physician organization, and so I had to put in their E. I. M.

[Robert Jordan] 15:11:03

That was a required element and the mailing address back to my organizations.

[Robert Jordan] 15:11:11

And of course I did the same thing with my skilled nursing facility.

[Robert Jordan] 15:11:15

So you can see that the common element here is organisation, type, and license are the 2 key parameters, and I want to make sure I have entered. even if the business name is a street name.

[Robert Jordan] 15:11:30

It should be legal business. same. but if it turns out to be a street name or a Dba, it won't matter as long as we have the license correctly captured.

[Robert Jordan] 15:11:41

Now at the end, after i've done all of my subordinate organizations entered.

[Robert Jordan] 15:11:46

I go back here to my primary, and I can send the Dsa here.

[Robert Jordan] 15:11:51

It says resend because i've already sent in fact when I clicked.

[Robert Jordan] 15:11:56

Send it went to Ellen Hospital, who received this kind of an email that said kindly, review and sign, and it's a standard adobe sign document.

[Robert Jordan] 15:12:06

Ellen clicked on. this, went through to the end, and click!

[Robert Jordan] 15:12:12

The sign, and after that Ellen received this message that said You're all done and attached is my copy of the the Dsa.

[Robert Jordan] 15:12:25

So the CEO can open it, file it whatever plus back in the portal down at the bottom of the primary organization.

[Robert Jordan] 15:12:37

I can see here that the the document came back signed.

[Robert Jordan] 15:12:42

Notice that it has a date Time stamp, if I were to by, for example, a pharmacy and set it up inside my hospital. I can add my pharmacy.

[Robert Jordan] 15:12:54

It's not a required signatory, but for completeness I might want to include it, in which case I would then have a second Dsa generated, because I have this handy resend Dsa for signature up here, So if

[Robert Jordan] 15:13:10

I forget something, acquire something I can keep adding and they will keep getting added to my Dsa.

[Robert Jordan] 15:13:17

I downloaded the Dsa. and I can open It and you'll note at the bottom the system was already pulled in the name of the person signing the title the phone number.

[Robert Jordan] 15:13:39

The email address, and it automatically imported the subordinate entities.

[Robert Jordan] 15:13:42

So everything that you saw earlier has just been pulled over to here.

[Robert Jordan] 15:13:47

If I add a pharmacy or an imaging center and resend Dsa, they would get resigned and appear on accumulative list

[Robert Jordan] 15:14:02

And the whole operation is basically that simple click, the Start register enter the primary organization information set up who will sign?

[Robert Jordan] 15:14:14

Determine the subordinate entities, add the subordinate entities, and send the Dsa.

[Robert Jordan] 15:14:22

For signature the system, takes care of the rest, sends it back, signed, and deposits it at the in the system for future reference, plus copy went to the signatory and he questions.

[Robert Jordan] 15:14:42
Put them in the questions, and we can go from there.

[Robert Jordan] 15:14:44
Mario, I have to stop share so that you can restart.

[Robert Jordan] 15:14:57
I believe

[John Ohanian] 15:14:59
John over to you. Thank you, Bob. I am reviewing the Q.

[John Ohanian] 15:15:06
A. and see a number of questions coming up a lot around the Q. H. I.

[John Ohanian] 15:15:11
So I thought I would just jump in and say, we are planning our next webinar.

[John Ohanian] 15:15:17
It will be december thirteenth you'll get a announcement if you haven't already seen the announcement come out, and that will specifically be a deep dive into the qh lo both

[John Ohanian] 15:15:26
the Grant program the onboarding the criteria's Cdi's role and a number of other areas.

[John Ohanian] 15:15:33
What I want to do real quick, because I know we've been kind of looking at the Q. And A.

[John Ohanian] 15:15:37
If there's some quick ones that we can I knock off, I was gonna just call out, Ram, if you were possible to to jump in here, and if there were a couple you wanted to to highlight and we have an Faq.

[John Ohanian] 15:15:52
That we we're gonna share with the with all of you as well kind of answer a number of the questions that are in the chat as well.

[John Ohanian] 15:16:00
So i'm Graham do you wanna have a minute or 2.

[Rim Cothren, CDII CalHHS] 15:16:03
Sure I've been looking through a little bit on the question specifically about

[Rim Cothren, CDII CalHHS] 15:16:10
The signing portal. One of the questions was,

[Rim Cothren, CDII CalHHS] 15:16:16
Where can we get a copy of the Dsa. Our Organizations Legal Council can review when it is time to sign the Dsa.

[Rim Cothren, CDII CalHHS] 15:16:24

And the policies and procedures are available on the Cdi.

[Rim Cothren, CDII CalHHS] 15:16:27

I website, and the data exchange framework that's Wwww.

[John Ohanian] 15:16:36

Dot c hhs dotc gov it is a long url to read But if you go to the can be available, for when it's in the chat there was another question

[Rim Cothren, CDII CalHHS] 15:16:55

about can Will each division of our organization need to sign the Dsa.

[Rim Cothren, CDII CalHHS] 15:17:00

Separately, or can the organization be considered an umbrella organization?

[Rim Cothren, CDII CalHHS] 15:17:07

I'll give a quick answer to this and then turn to Bob to add color. If I miss something it is really for you to determine who is authorized to sign for divisions within your organization legally the portal allows

[Rim Cothren, CDII CalHHS] 15:17:23

for a single person to sign on behalf of multiple subordinates, such as divisions, facilities, or subordinate entities.

[Rim Cothren, CDII CalHHS] 15:17:33

But you need to determine legally whether an individual within your organization is authorized to sign

[Robert Jordan] 15:17:48

Yeah. the legal authorization is the key there. But our intent was to allow for a single signature to cover multiple entities, even if there are mixed types.

[Robert Jordan] 15:17:59

Like I showed in the example. So it's not necessary that everything be a hospital or everything, be a skilled nursing facility, but rather to enable organizations to determine what best fits them and simple is always better

[John Ohanian] 15:18:21

There are also a couple of other questions about tracking who assigned.

[Rim Cothren, CDII CalHHS] 15:18:27

Yes, Cdi plans to report on our website. who has signed the Dsa.

[Rim Cothren, CDII CalHHS] 15:18:32

So that folks will be aware that

[Rim Cothren, CDII CalHHS] 15:18:42

They're also a number of questions about who must sign how do organizations know if they meet the definitions?

[Rim Cothren, CDII CalHHS] 15:18:50

As John said earlier, the best source of information there is the Faq.

[John Ohanian] 15:18:58

That's posted on the cdi website through things, but go ahead and the the we dropped it in the chat.

[John Ohanian] 15:19:08

So please take a look, and then i'm gonna put it back to Juliet real quick.

[John Ohanian] 15:19:11

I know there are some questions on the Qao ongoing costs, and things like that can speak to

[Juliette Mullin] 15:19:21

Yeah, sure. I can answer that. I We saw a number of questions in the chat about specifically.

[Juliette Mullin] 15:19:26

What will the grants cover in terms of allowable use in the funding?

[Juliette Mullin] 15:19:30

We saw some questions specifically about whether it would cover ongoing costs for connecting to the Qhao or ongoing.

[Juliette Mullin] 15:19:38

Technical solution costs. cdi is still defining all of the different elements of the criteria for those grant domains.

[Juliette Mullin] 15:19:46

So we'll be sharing additional details about the exact potential uses of funding in the coming, you know, months, and so really encourage folks to join

[Juliette Mullin] 15:19:56

Our next lc meeting, and our next webinar as well we'll share that information as as it becomes finalized and available.

[John Ohanian] 15:20:05

Excellent. Thank you so much. if we have any others, we can.

[John Ohanian] 15:20:12

We have few others popping in so we're just doing handling your questions in real time to bear with us for a moment.

[John Ohanian] 15:20:22

Okay.

[John Ohanian] 15:20:23

Okay, Do you want to maybe take this one rim or Bob?

[John Ohanian] 15:20:27

The question on, Can you clarify what license is needed?

[John Ohanian] 15:20:31

Is this a California position license or an organizational license?

[Robert Jordan] 15:20:34

I would let Rim say it, but he may have forgotten how eloquently he presents it.

[Robert Jordan] 15:20:39

Where is the legislation? Ab: 1, 33 speaks to organizations, not to individuals.

[Robert Jordan] 15:20:49

And so, consequently no, not an individual physician license, but an organization.

[John Ohanian] 15:20:57

And that's as far as the legislation got thank you so I know we have about a few minutes left of time.

[John Ohanian] 15:21:09

But like we said there's a number of questions here that we may what we typically do after something like this is, we'll get back to you all the slides as well as questions and answers, so that folks you know

[John Ohanian] 15:21:21

that we've taken the time to answer your question does help you. please do take a look at the prior webinars.

[John Ohanian] 15:21:27

They have been recorded. and like I said, the one coming up next month, which will deep dive into qh io.

[John Ohanian] 15:21:35

This is a fast moving train. we have a lot going on up here, and we really appreciate the fact that all of you attended today.

[John Ohanian] 15:21:43

We want your your questions and your concerns, because if you have them, likely others do as well.

[John Ohanian] 15:21:49

Please spread the word We hear a lot of the time that people are hearing about the data exchange framework for the first time, and so please pass around in your circles to get others to attend these webinars.

[John Ohanian] 15:22:02

So that they they know how they're impacted and how we can help support them in this transition.

[John Ohanian] 15:22:07

So with that, I want to wish all of you a healthy and safe holiday.

[John Ohanian] 15:22:13

And there are some dates there, someone keeping me back on script which is good.



[John Ohanian] 15:22:17

Thank you. there's all helpful hints and dates that you wanna take into consideration following your thanksgiving.

[John Ohanian] 15:22:25

And we look forward to seeing you at future events. Thank you very much, and have a great day.