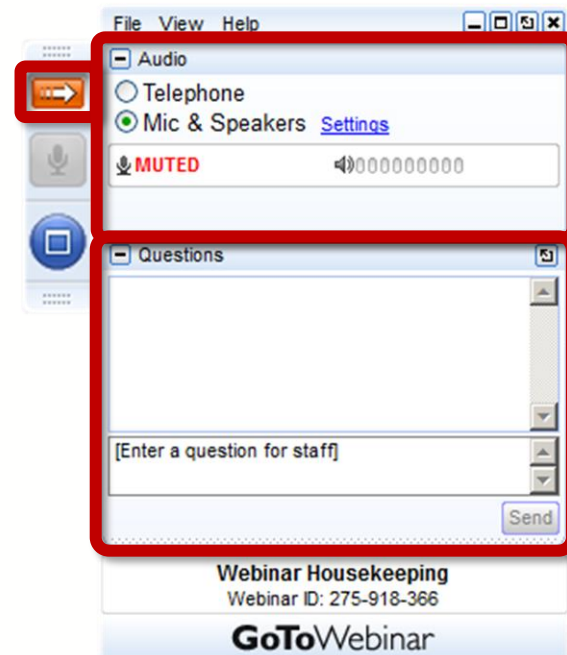# eHealth Exchange™

All Participant Call

How Do I Participate?

Your Participation

Open and close your control panel

Join audio:
- Choose "Mic & Speakers" to use VoIP
- Choose "Telephone" and dial using the information provided

Submit questions and comments via the Questions panel

Note: Today's presentation is being recorded and will be provided within 48 hrs

Problems or Questions? Contact Dawn Van Dyke

dvandyke@ehealthexchange.org or 703.864.4062

eHealth Exchange

Today's Topics

1. New Participants	Mark Rogers
2. Operating Policy & Procedure (OPP) Highlights	Pat Russell
3. CC Elections	Pat Russell
4. Directory Update	Michael McCune
5. QHIN Update & Opt Out Updates	Kathryn Bingman
6. Events	Mark Rogers
7. Contacts & Operational Notices	Mark Rogers
8. Q&A	Everyone

New Participants

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Congratulations to our newest Participants!

- Hospital Sisters Health System
- Health Choice Network
- Ashland Hospital Corporation

Committed to Improving Patient Care via Data Exchange

Operating Policy & Procedure (OPP) Highlights

July 2023

eHealth Exchange™

eHealth Exchange Work Group: OPP Revision Overview

- The 2023 OPP Work Group review was made up of CC members: Paul Mathews, Pam Mathews, Jaime Bland, and Melissa Ayres, eHealth Exchange staff: Patrica Russell, and consultant: Joelle Buckner. This Work Group met over the course of two weeks in June 2023.

- OPPs were adjusted to improve clarity, readability and make the OPPs consistent with the current environment and operations of eHealth Exchange.

- Each 2023 OPP change has been characterized as:

  Housekeeping Only » All the OPP definitions were moved to a master definitions document: OPP Glossary of Terms, to ensure consistency and clarity across all definitions within the eHealth Exchange OPPs

  Clarification » These edits are intended to provide clarity around terms and references

  Substantive » These edits are suggested to reflect the current environment and operations of eHealth Exchange

- Questions or Concerns: administrator@ehealthexchange.org

- Proposed revision details are published on the bottom of https://ehealthexchange.org/policies

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OPP Process: Guiding Principles

1. Every 3 years, Coordinating Committee appoints a Work Group to review all OPPs
2. Work Group considers classifying proposed changes as:
   a. "Housekeeping Only" to improve formatting, readability and consistency
   b. "Clarification" to provide clarity around terms and references
   c. "Trust-Driven" changes necessitated by any DURSA amendment, legislative, or other trust framework changes
   d. "Substantive" Changes suggested to reflect the current environment & operations of the eHealth Exchange
3. Work Group leverages and updates:
   a. OPP Template & Instructions
   b. Operating Policy & Procedures (OPP) Highlights Document
   c. OPP Glossary of Terms
4. Work Group reviews recommended changes with Coordinating Committee
5. Coordinating Committee approves suggested changes as appropriate
6. eHealth Exchange staff outlines proposed changes to Participants at monthly All Participant Teleconference and via a recorded webinar
7. Participants are provided 30 days to object to an updated OPP

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"Housekeeping" Changes

1. Removed all individual definitions from the Definition sections of all OPPs

2. Replaced with reference to a master definitions document: OPP Glossary of Terms

3. Ensures consistency and clarity across definitions within the eHealth Exchange OPPs

The following OPPs were **only** revised with "Housekeeping" adjustments:

- OPP #8: Data Use and Reciprocal Support Agreement and Amendment Process
- OPP #14: How to Comply with the DURSA's Duty to Respond

OPP #1 – Review and Disposition of Applications for Participation

Policy Section:

- Updated to reflect current agreement names

Procedure Section:

- Updated to reflect current digital certificate process;

- Removed the Limited Production Period language since it is no longer applicable, and all connections now come through the Hub; and

- Removed the 180-day production requirement.

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OPP #2 – Coordinating Committee General Operating Procedure

Purpose Section:

- Removed the "Note" under Purpose which was left over from when ONC was given a seat on the CC. The Coordinating Committee is not a federal advisory committee.

Procedure Section:

- Update the Terms of Office section for Non-Federal Participant Representative to reflect current process.

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OPP #3 – Participation-Changes, Suspension, Termination

Procedure Section:

- Updated language to reflect the new certificate procedures: removed suspension of certificates and changed to reflect policy of revocations and reissuance; and

- Objections and Plan of Correction section was updated to reflect the appropriate action of the CC under the DURSA.

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OPP #4: Change Process-Performance and Service Specifications

Procedure Section:

- Added "DURSA" under section D where it references Section 11.03(d)

Reference Section:

- Updated this section to include the reference to "Section 19.02, Suspension and Termination by Participant"

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OPP #5: Change Process-Operating Policies and Procedures

Procedure Section:

- Added "DURSA" under section D where it references Section 11.03(d)

OPP #6 – Confidential Information Handling

Policy Section:

- Removed the ONC Representative language since the CC no longer has an ONC member.

OPP #7 – Adverse Security Event Notification

- Minor word edits were made throughout to this OPP for better clarification.

OPP #9 – Digital Credentials

Policy Section:

- Updated to reflect new OAuth security model;

- Updated to help differentiate between SOAP and FHIR;

- Updated to accurately reflect only TLS V1.2 Conformance statements; and

- Removed reference to FBCA since no longer relevant.

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OPP # 10 – Adverse Security Event Notification

- Policy section:
  - Language was updated to reflect opt-out language under DURSA section 12.05
    - Changed from "…is <u>required</u> to opt-out" to "…<u>chooses</u> to opt-out"

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OPP # 11 – eHealth Exchange Service Levels and Operating Monitoring

Purpose Section:

- Updated to remove vagueness on eHealth Exchange's network quality assurance on behalf of its Participant systems.

Procedures section:

- Updated Section 3.d to reflect current retention periods for the Hub Dashboard and audit transaction logs.

OPP # 15 – Hub Message Transformation Inventory

Purpose section:

- Moved the Transformation definition out of Purpose section to the OPP Glossary of Terms.

OPP # 15 – Hub Message Transformation Inventory

Policy section:

- Examples moved from the Appendix and up into the body of the policy section.

Procedure Section:

- Added the inventory external template document name: *Hub Message Transformation Inventory – TEMPLATE;*

- Updated to reflect minimum inventory information necessary to be populated and language to reflect current processes; and

- Clarified how the Inventory information to eHealth Exchange Participants is made available.

OPP # 16 – Participants Must Use Hub for All Transactions

Policy section:

- Removed the point-to-point connection language since connections now go through the Hub.

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Proposed Next Steps

- <u>7/18/2023</u>: Coordinating Committee votes to approved revised OPPs

- <u>7/20/2023</u>: Outline OPP revisions on All Participant call

- <u>Late July</u>: Outline OPP revisions on recorded webinar to share on eHx web site

- <u>August</u>: Provide Participants 30 days to object to any revised OPP

- <u>9/1/2023</u>: Revised OPPs go into effect if fewer than 1/3 of Participants object

2023 Election

Coordinating Committee Seats

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2023 Coordinating Committee (CC) Seats

	Representative	Term Date
HIO	Jaime Bland, RN	9/30/2025
	John Kansky	9/30/2023
	Pam Matthews	9/30/2024
Health Systems/IDN	Patti Cuartas, PA	9/30/2023
	Matt Eisenberg, MD	9/30/2025
	Open (formerly Ryan Stewart)	9/30/2023
Other	Paul Matthews	9/30/2025
	Eric Liederman	9/30/2024
	Derek Plansky	9/30/2024

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2023 Coordinating Committee (CC) Election Timeline

- Nominating Committee – Pam Matthews, Paul Matthews, Matt Eisenberg and Derek Plansky
  - Completed review and edits of application
- Announce elections during monthly All Participant Call – May, June and July
- July 14 - Email Participant notice for elections
- July 17 – July 28 - Open for applications
- July 31- August 4 - Nominating Committee Review Applications
- August 8 - Nominating Committee finalizes slate of nominees
- August 15 - Coordinating Committee approves slate of nominees
- August 21-September 1 - Participants Vote
- September 5-11 - Time for a runoff if needed
- Sept 19 - New Coordinating Committee Members shadow CC Call
- Sept 21 - Notice to Participants on monthly All Participant Call
- Sept 25 – October 13, Orientation
- October 17- First New CC Member meeting

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Directory Update

Legacy Directory Retirement and
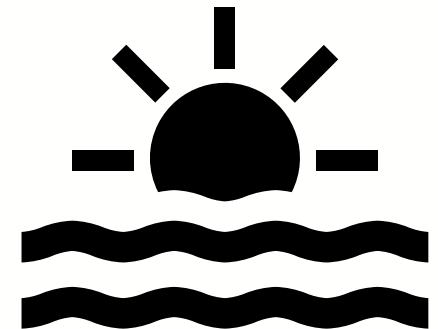Transition to FHIR R4 Directory

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Rollout of New HAPI Directories and Retirement of Legacy Directories

Rollout of the new HAPI directories to all participants:

- The HAPI directories have been available to all participants since 4/12/2023

- Legacy directories will be the data source for HAPI directories until the legacy directories are retired. Updates/additions will be made to the legacy directories and the legacy directories will be used to refresh the data in the HAPI directories

Legacy directory retirement

- The legacy directories will be retired on July 27th and will no longer be accessible by participants after July 27th.

- The eHealth Exchange is aware of several participants which need to migrate to the HAPI directories, but please inform administrator@ehealthexchange.org that you need to migrate if not sure.

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Planned transition to the new HAPI Directories

Transition Plan - the eHealth Exchange will migrate access to the new HAPI directories as follows:

- FHIR API access:
  - Participants with FHIR API keys for the legacy directories will be migrated to access the new HAPI directories. After July 6th, the FHIR API keys will not be able to access the legacy directories.
  - Prior to July 6th, the eHealth Exchange informed participants that their FHIR API keys are ready to use with the new HAPI directories. If your organization has specific technical contacts that need to be alerted, send an email to administrator@ehealthexchange.org

- UDDI API access:
  - *During the week of July 17th*, participants accessing the legacy directories with the UDDI API will have their requests forwarded to the UDDI API under the new HAPI directories. Forwarding will be setup as follows:
    - Legacy VAL with path /uddi/inquiry → Forward requests to HAPI VAL directory with path /uddi
    - Legacy VAL HubAware with path /uddi/inquiry → Forward requests to HAPI VAL directory with path /uddi-hubaware
    - Legacy PROD with path /uddi/inquiry → Forward requests to HAPI PROD directory with path /uddi
    - Legacy PROD HubAware with path /uddi/inquiry → Forward requests to HAPI PROD directory with path /uddi-hubaware

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HAPI directory updates after legacy directory retirement

- **After retirement of the legacy directories on July 27th:**
  - Requests for new directory entries or updates to existing directory entries should be submitted to techsupport@ehealthexchange.org
  - The eHealth Exchange will stop using "INI files" as a template to provide information for directory changes. When you submit a ticket to techsupport@ehealthexchange.org, please ask for a new template before submitting changes. Stay tuned for further updates.

- **Future state:**
  - A new **self-service directory portal** will be rolled out for participant access so that your organization may make changes to directory entries, although the portal will not be immediately available after July 27th. More updates about the self-service directory portal will be coming later this year.

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New FHIR R4 directories have been available since Wednesday 4/12/2023!

- Email techsupport@sequoiaproject.org to get access to the new FHIR R4 directories based on HAPI:

- For existing FHIR API users, ask to have your API key migrated to the HAPI directories. For organizations that have not accessed the directory FHIR API in the past, ask for a new FHIR API key to access the HAPI directories.

- Provide feedback on the new HAPI directories:

- Email techsupport@ehealthexchange.org for technical issues or concerns

- For urgent attention, copy administrator@ehealthexchange.org

New HAPI Directory APIs – 3 API Choices

FHIR Client API

- Access the directory with a FHIR client using a FHIR API key provided by Sequoia technical support – email techsupport@sequoiaproject.org for a FHIR API key
- Provides access to both **Argonaut STU3 FHIR** (same as the current directory offering) and **FHIR R4** APIs
- Typically provides read-only access – no update or create operations

UDDI API (SOAP API) continued support, for now

- The new FHIR HAPI based directory will support a traditional **UDDI/SOAP** interface
- Newer data elements introduced with STU3/R4 will not be available under the UDDI/SOAP interface
- **No access** to sub-participant entries
- Access will require SSL/TLS certificate-based security only, as in the past
- The UDDI API **will be retired on 12/15/2023** so please make plans to transition to FHIR API access!

New HAPI Directories and Hub endpoints

FHIR Client API and Hub endpoints

- Unlike the current directories, using the FHIR APIs, there are no longer separate directories for direct endpoints and Hub endpoints.
- To obtain Hub endpoints using the FHIR APIs, use the FHIR operation $hub-aware. For example:
  - For all FHIR R4 entries with Hub endpoints:
    - https://directory.prd.ehealthexchange.org/fhir/Organization/**$hub-aware**
  - For a single FHIR R4 entry with Hub endpoints:
    - https://directory.prd.ehealthexchange.org/fhir/Organization/2.16.840.1.113883/**$hub-aware**

UDDI API (SOAP API) and Hub endpoints

- The base URI remains the same for direct and Hub endpoints but the path changes. For example:
  - Direct endpoints with the UDDI API:
    - https://directory.prd.ehealthexchange.org/uddi
  - Hub endpoints with the UDDI API:
    - https://directory.prd.ehealthexchange.org/uddi-hubaware

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Directory Query Recommendations

- Query with an "active=true" parameter
  - Directory entries with "active=false" are unapproved and not ready to query
  - Unlike the legacy directories, if you don't specify a value for "active", then the default is not "active=true". Entries will be returned with active set to true and false if the active parameter is not specified.
- Query for Participant entries if you don't want to retrieve Subparticipant entries
  - Query parameter/value for Participant entries: type=https://sequoiaproject.org/fhir/sphd/CodeSystem/OrganizationType%7CParticipant
    - Note: %7C is an URL encoded pipe character ("|")
  - In the future, the directory will have SubParticipant entries which represent provider locations such as a hospital or clinic.
- Directory paging
  - HAPI has a paging feature which adheres to the paging behavior specified by FHIR R4 – see http://hl7.org/fhir/R4/search.html#count
  - The directory is currently set to a default page size of 500, so by default, 500 records will be returned for a single response. You can return less records in a response by setting the _count parameter to a value lower than 500.
  - The maximum page size is 1000, so you cannot increase the page size beyond 1000 using the _count parameter.

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FHIR R4 Directory Transition Questions & Answers

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QHIN Update

Have You Made A Decision?
It's Time To Choose TEFCA

- The 60-day opt-out period for eHealth Exchange network participants **ends July 31st, 2023**.

- **An organization may only participate in TEFCA exchange via a single QHIN.**
  - If your organization is active today with multiple candidate QHIN networks, you must select only one to use for TEFCA exchange. This does not preclude you from continuing to participate in multiple networks for non-TEFCA exchange.

- Review all policies, checklists, webinars, and FAQs now available to make an informed decision:

  https://ehealthexchange.org/what-we-do/tefca-and-ehealth-exchange/#tefca-resources

- 251 of our 328 Participants have opted out.

Action Required:
If your organization does not wish to exchange with TEFCA-enabled networks via the eHealth Exchange, you must notify administrator@ehealthexchange.org by 7/31/2023.

Your organization can change its decision to connect with TEFCA at any time.

If your organization would like to engage in TEFCA exchange via eHealth Exchange but will not be ready to fulfil the QHIN participation obligations by the end of 2023, we suggest you opt-out for now.

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TEFCA Policy and Technical Obligations Now Available

TEFCA Policy Review	TEFCA Technical Review
July 24, 2023 12:00 – 1:00 p.m. ET	July 31, 2023 12:00 – 1:30 p.m. ET
Register Now	**Register Now**

TEFCA Resources for eHealth Exchange Participants

📄 TEFCA Obligations	📋 TEFCA Checklist *(Includes Technical Obligations)*	📊 Webinars
View Resources +	View Resources +	Register Now or View Past Events +

TEFCA QHIN Frequently Asked Questions

— **Why should my organization join TEFCA?**

Like Carequality, we expect that TEFCA will open access to additional exchange partners and eventually, will support additional use cases beyond query for treatment and individual access.

https://ehealthexchange.org/what-we-do/tefca-and-ehealth-exchange/#tefca-resources

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Intent to Participate from 8 HIEs – More Coming Soon!

AK, AL, AZ, CA, CO, CT, GA, IA, IN, MD, TX, WV, VA & DC

Fun Fundraiser – 'QHINS Aren't Real...or are they?'
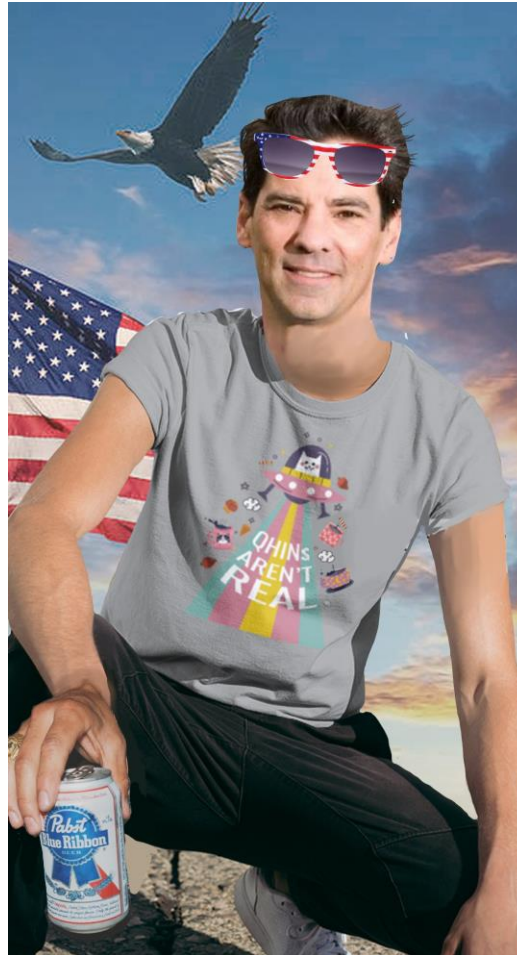
Events - 2023

Upcoming Conferences

August 8-10, 2023
Hyatt Regency - New Orleans, LA
Booth #623
Link for registration

August 20-23, 2023
Gaylord - National Harbor, MD
Link for registration

August 27-30, 2023
Coeur d'Alene – Idaho
Link for registration

We hope to see you there!

Annual Meeting – Mark Your Calendar!

REGISTRATION OPEN
FREE FOR NETWORK PARTICIPANTS

eHealth Exchange
Annual Meeting
NOV 14 **2023**
SAN DIEGO | CALIFORNIA

Tuesday, November 14, 2023
eHealth Exchange Annual Meeting

Town & Country Resort
500 Hotel Circle North
San Diego, CA 92108

https://ehealthexchange.org/2023-annual-meeting/

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Contacts
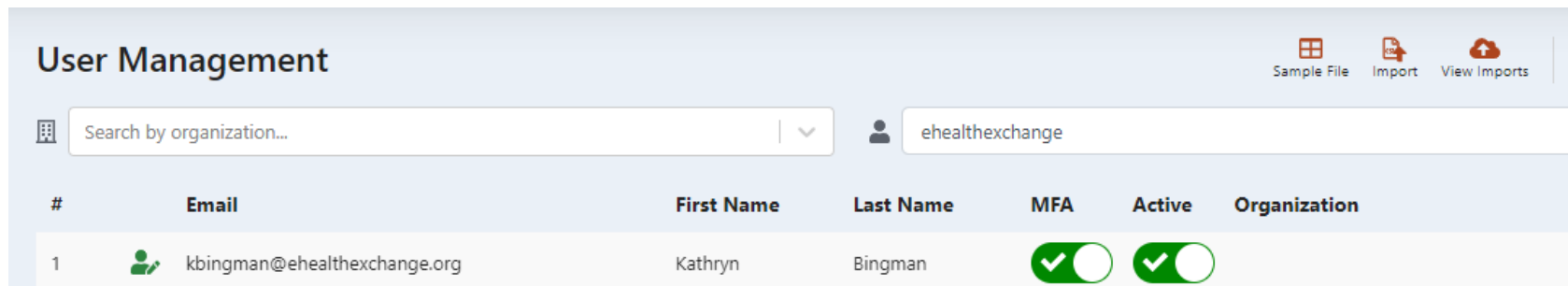
Changing and New Contacts

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Contacts for Your Organization

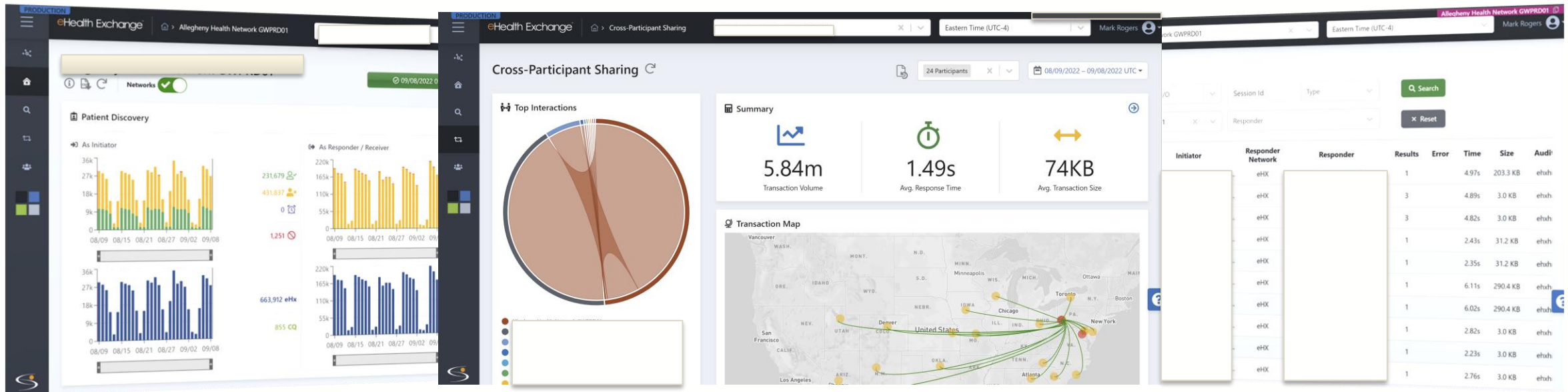We want to ensure that we are reaching the right people at your organization with our communications.

- If you have had recent or past changes and are unsure if we have an updated list: email administrator@ehealthexchange.org requesting the Contact List Template to complete and return.
- The template asks name, title, phone number, email address, and what type of emails the resource should receive.
- This will assist eHealth Exchange and each Participant in knowing that the communication we send is received appropriately.

Don't forget to maintain your Hub Dashboard accounts! If nobody at your organization currently has the rights to add/remove Dashboard accounts, please reach out to us at administrator@ehealthexchange.org.

Your Hub Dashboard – Your web portal providing interoperability insights.

- **Identify transaction volume, response times, drill-down, & download.**
- **Who is querying your organization?**
- **Where are your clinicians searching?**
- **How much care occurs outside your organization?**

Please Engage!

We'd love to hear from you.

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Technical Work Group

Thursdays 4-5pm Eastern: email administrator@ehealthexchange.org for an invite

Typical Topics:

1. Technical Specification Creation
   a) Push notifications
   b) Populating directory with hospital locations
   c) Broadcast query
   d) FHIR Directory
   e) Consumer access
   f) Carequality harmonization
   g) Controlled Unclassified Information (CUI) Marking
2. Testing
3. Hub Updates
4. Capacity planning [Final Thursday each month]

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How might I obtain additional information?

How	When	Where
Visit eHealth Exchange Website	Any time	https://ehealthexchange.org
Monthly Participant Web Meetings	3rd Thursday of Each Month at 1 pm ET	https://ehealthexchange.org/events
Weekly Technical Workgroup	Thursdays 4-5 ET	https://ehealthexchange.org/events
Email	Any time if you have a specific question	administrator@ehealthexchange.org

How might I obtain assistance?

How	Who	Where
Certificates	Direct Trust Support	support@directtrust.zohodesk.com
Hub and Hub Dashboard Assistance	Hub Service Desk	servicedesk@hub.ehealthexchange.org
Directory Assistance, setup, changes	Tech Support	techsupport@ehealthexchange.org
Testing Questions	Testing Team	testing@ehealthexchange.org
Questions about DURSA/OPP's	Administrator	administrator@ehealthexchange.org

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