

eHealth Exchange™

All Participant Call

April 2026



Housekeeping Items



All lines have been muted to avoid background noise.



Type questions in Q&A section at any time.
We'll open for questions after each agenda topic.



This meeting is being recorded and will be shared via email.

Today's Topics

FDA BEST	Francis X. Campion, MD, FACP Mark Walderhaug, PhD
TEFCA Updates	Mike Yackanich
Hub Updates	Mike Yackanich
My Directory Portal	Tiffanie Hickman
Updated Website Pages	Tina Feldmann
Marketing Update	Tina Feldmann
Information & Resources	Ashley Green
Q&A	Anyone





BEST IM* Program: Accelerating the Automation of Adverse Event Reporting

*Biologics Effectiveness and Safety (BEST) Innovative Methods (IM)

Mark Walderhaug, PhD, Associate Office Director for Risk Assessment, U.S. Food and Drug Administration, Center for Biologics Evaluation and Research, Office of Biostatistics and Pharmacovigilance

Jessica Zhou, MD, Staff Fellow, U.S. Food and Drug Administration, Center for Biologics Evaluation and Research, Office of Biostatistics and Pharmacovigilance

Francis X. Champion, MD, FACP, Clinical Science, Principal, The MITRE Corporation



BEST IM Goal

Modernize the safety surveillance of vaccines, blood, and biologic therapeutics used to care for patients.

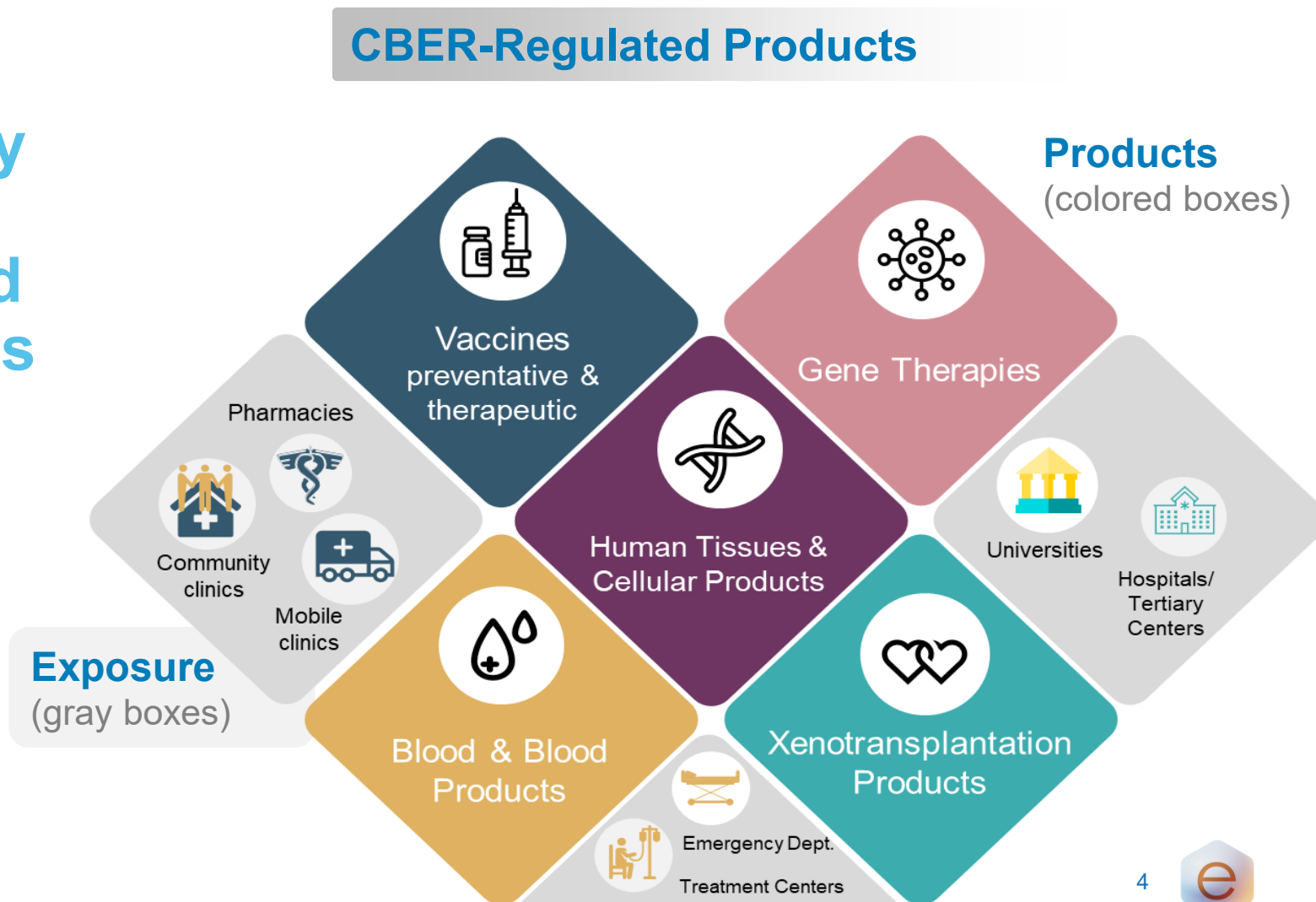


Fig 1: FDA CBER Regulated Products (FDA)

Current Reporting* Tools (~40 min **)



Vaccine Adverse Event Reporting System (VAERS) Form

VAERS Vaccine Adverse Event Reporting System
www.vaers.hhs.gov

Adverse events are possible reactions or problems that occur during or after vaccination. Items 2, 3, 4, 5, 6, 17, 18 and 21 are **ESSENTIAL** and should be completed. Patient identity is kept confidential. Instructions are provided on the last two pages.

INFORMATION ABOUT THE PATIENT WHO RECEIVED THE VACCINE (Use Continuation Page if needed)

1. Patient name: (first) _____ (last) _____
Street address: _____
City: _____ State: _____ County: _____
ZIP code: _____ Phone: () _____ Email: _____

2. Date of birth: (mm/dd/yyyy) _____ 3. Sex: Male Female Unknown

4. Date and time of vaccination: (mm/dd/yyyy) _____ Time: hh:mm _____ AM PM

5. Date and time adverse event started: (mm/dd/yyyy) _____ Time: hh:mm _____ AM PM

6. Age at vaccination: _____ Years _____ Months 7. Today's date: (mm/dd/yyyy) _____

8. Pregnant at time of vaccination?: Yes No Unknown
(If yes, describe the event, any pregnancy complications, and estimated due date if known in item 18)

9. Prescriptions, over-the-counter medications, dietary supplements, or herbal remedies being taken at the time of vaccination: _____

10. Allergies to medications, food, or other products: _____

11. Other illnesses at the time of vaccination and up to one month prior: _____

12. Chronic or long-standing health conditions: _____

INFORMATION ABOUT THE PERSON COMPLETING THIS FORM

13. Form completed by: (name) _____
Relation to patient: Healthcare professional/staff Patient (yourself)
 Parent/guardian/caregiver Other: _____
Street address: _____ Check if same as item 1
City: _____ State: _____ ZIP code: _____
Phone: () _____ Email: _____

14. Best doctor/healthcare professional to contact about the adverse event: Name: _____
Phone: () _____ Ext: _____

INFORMATION ABOUT THE FACILITY WHERE VACCINE WAS GIVEN

15. Facility/clinic name: _____
Fax: () _____
Street address: _____ Check if same as item 13
City: _____
State: _____ ZIP code: _____
Phone: () _____

16. Type of facility: (Check one)
 Doctor's office, urgent care, or hospital
 Pharmacy or store
 Workplace clinic
 Public health clinic
 Nursing home or senior living facility
 School or student health clinic
 Other: _____
 Unknown

WHICH VACCINES WERE GIVEN? WHAT HAPPENED TO THE PATIENT?

17. Enter all vaccines given on the date listed in item 4: (Route is HOW vaccine was given, Body site is WHERE vaccine was given) Use Continuation Page if needed Dose number in series

Vaccine (type and brand name)	Manufacturer	Lot number	Route	Body site	Dose number in series
select	select	select	select	select	select
select	select	select	select	select	select
select	select	select	select	select	select
select	select	select	select	select	select

18. Describe the adverse event(s), treatment, and outcome(s), if any: (symptoms, signs, time course, etc.) _____

21. Result or outcome of adverse event(s): (Check all that apply)
 Doctor or other healthcare professional office/clinic visit
 Emergency room/department or urgent care
 Hospitalization

MedWatch Form (Biologics & Blood)

Reset Form

FDA DEPARTMENT OF HEALTH AND HUMAN SERVICES
Food and Drug Administration
MEDWATCH
The FDA Safety Information and Adverse Event Reporting Program
Form FDA 3500

Form Approved: OMB No. 0910-0291, Expires: 06-30-2025
See PRA statement on page 6.

FDA USE ONLY
Triage unit sequence # _____
FDA Rec. Date _____

For VOLUNTARY reporting of adverse events, product problems and product use/medication errors

Note: For date prompts of "dd-mmm-yyyy" please use 2-digit day, 3-letter month abbreviation, and 4-digit year; for example, 01-Jan-1900.

A. PATIENT INFORMATION

1. Patient Identifier (In confidence) _____

2. Age _____ or Date of Birth (e.g., 01-Jan-1900)
 Year(s) Week(s)
 Month(s) Day(s)

3a. Sex: Enter the patient's sex at birth (the sex that a person has or was assigned to at birth).
 Male Undifferentiated
 Female Decline to answer

3b. Gender: Enter the patient's current gender (how the patient thinks of herself).
 Cisgender man/boy (gender corresponds with birth sex)
 Cisgender woman/girl (gender corresponds with birth sex)
 Transgender man/trans man/female-to-male (FTM)
 Transgender woman/trans woman/male-to-female (MTF)
Other gender category; please specify: _____
 Decline to answer

4. Weight _____
 lb kg

5. Ethnicity (Check one)
 Hispanic/Latino
 Not Hispanic/Latino

6. Race (check all that apply)
 American Indian/Alaska Native Native Hawaiian/Other Pacific Islander
 Asian
 Black or African American White

B. ADVERSE EVENT, PRODUCT PROBLEM

1. Type of Report (check all that apply)
 Adverse Event
 Product Use/Medication Error
 Product Problem (e.g., defects/malfunctions)
 Problem with Different Manufacturer of Same Medicine

2. Outcome Attributed to Adverse Event (check all that apply)
Death - Date of death (e.g., 01-Jan-1900): _____
 Life-threatening Required Intervention to Prevent Permanent Impairment/Damage
 Hospitalization (initial or prolonged) Disability or Permanent Damage
 Other Serious or Important Medical Events Congenital Anomaly/Birth Defects

3. Date of Event (e.g., 01-Jan-1900) _____

4. Date of this Report (e.g., 01-Jan-1900) _____

5. Describe Event, Problem or Product Use/Medication Error _____

Characters Remaining (max. 4,000): _____

* First line (passive) safety surveillance tools for signal detection
** As estimated by OMB



Pathway for BEST IM Studies via eHealth Exchange

1

The **DURSA** permits the **exchange** of information **among** eHealth Exchange **Participants** for the various purposes:

- Treatment, Payment, and Healthcare Operations (HIPAA-defined);
- Innovative payment models (e.g., value-based care);
- **Public Health under applicable Laws;**
- Meaningful use of certified EHR technology;
- Individual access to their own health information

Restatement II of the Data Use and Reciprocal Support Agreement (DURSA)

Version Date: August 13, 2019

Restatement II of the Data Use and Reciprocal Support Agreement

6



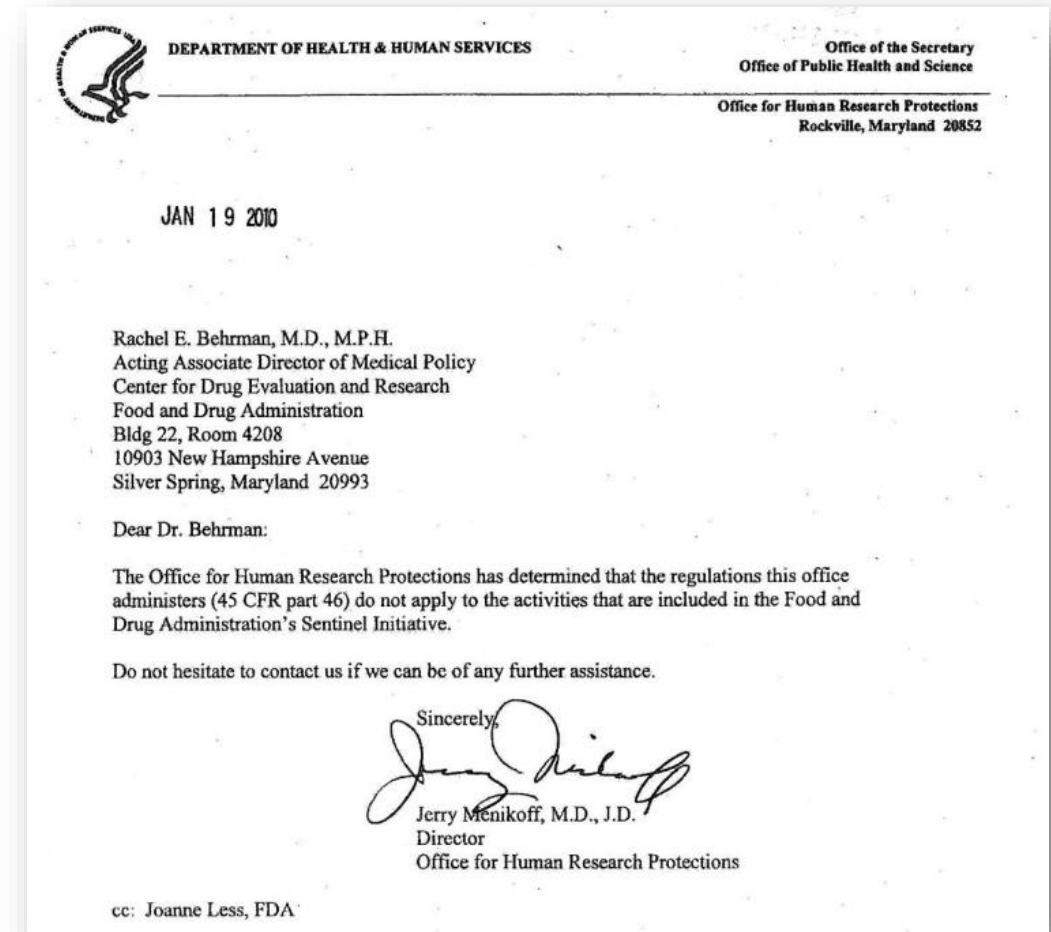
<https://ehealthexchange.org/dursa/>

Public Health Surveillance Activity

2

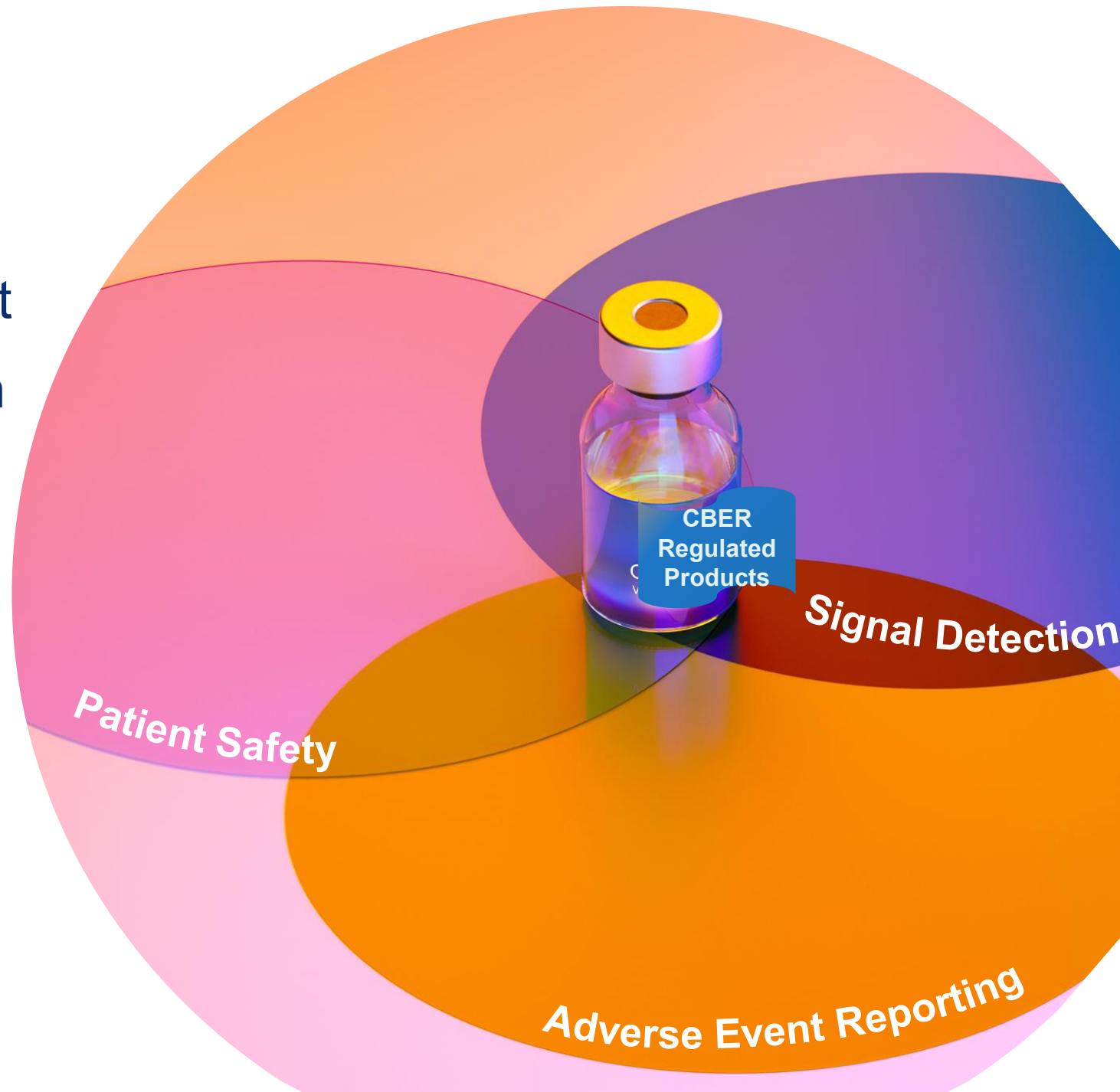
The **Office for Human Research Protections** determined that our studies are:

- Conducted under the **FDA Sentinel Initiative**
- Deemed a **Public Health Surveillance Activity**
- **Not considered human subjects research** under 45 CFR part 46
- **OHRP guidance** confirms IRB regulations do not apply



The Opportunity

- **Streamline Adverse Event Case Reporting and Reduce Provider Burden**
- **Enable Real-Time Signal Detection and Active Surveillance**
- **Enhance Patient Safety Through Improved Data Quality and Timeliness**
- **Empower Public Health Through Innovation and Collaboration**

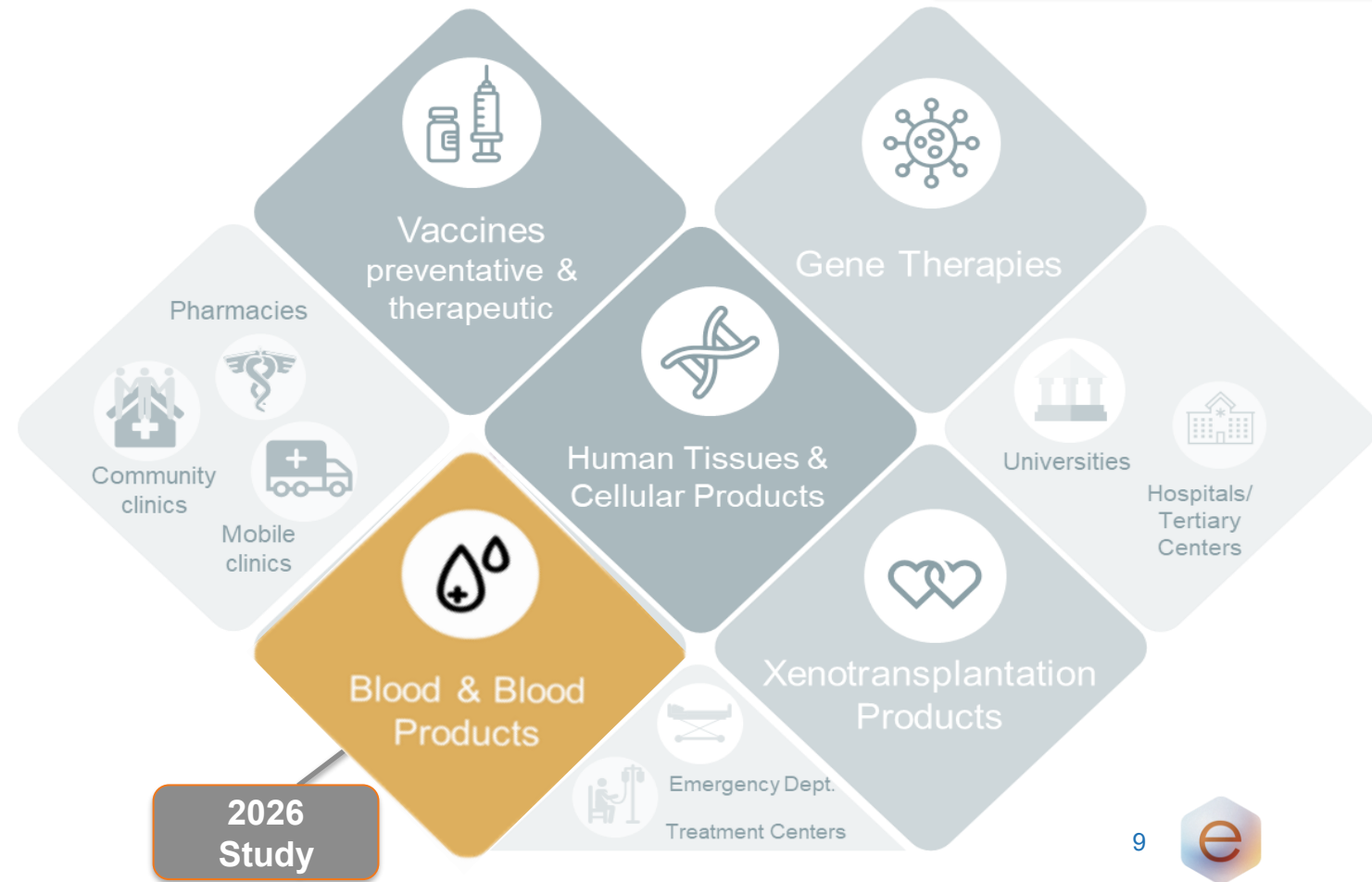


2026 BEST IM Study Topic: Blood & Blood Products

DRAFT

DRAFT Study Protocol Title:

"Automated Identification of Potential Adverse Events Associated with Blood and Blood Products using Electronic Health Record Data"



Draft Study Aims

Data Network Formation

1

Aim:

- Evaluate data connection to *collect adequate EHR data...*
- through *health systems, HIEs and HDUs...*
- using FHIR data standards...
- for health information sharing...
- over the *eHealth Exchange* network...
- to *identify and evaluate potential adverse* events related to *blood transfusion and blood product administration.*

LLMs and CQL Logic

2

Aim:

- Develop and apply tools using *LLMs* and *CQL logic* to FHIR data...
- from electronic health records...
- to assist clinical reviewers...
- to detect *anaphylaxis* related to *blood transfusion* and *blood product administration.*

2026 BEST IM Study Focus



Blood & Blood Products

EHR = electronic health records
LLM = large language models

HIE = health information exchange
CQL = clinical quality language

HDU = health data utility

Level of Effort



Step 1 – Initial Exposure Query:

Find the number of exposures to blood / blood products.

- MITRE will provide value sets
- Single number of transfusion events
- No line level data required
- Inpatient + Outpatient Data
- ~4-year time span

Step 2 – Outcomes Query:

Find the number of outcomes of interest (e.g., anaphylaxis).

- MITRE will support (value sets, codes to query patients of interest)
- Leverage FHIR data standards
- Will require data sharing via eHealth Exchange – specifically:
 - EHR data – link to individual records (e.g., nursing notes – pertaining to transfusions¹¹ and when additional treatment was rendered, physician progress notes, discharge notes, labs, etc.)



Participation Benefits



Financial Incentives

Incentives available to a limited amount of participants.



Innovate to Improve Patient Safety

Demonstrate public health leadership and community benefit.



Reduce Provider Burden

Replace current manual reporting.



Collaborate with Interoperability Pioneers

Use FHIR for semi-automated detection of biologics-related adverse events, and advance interoperability in your health system.



Publish Findings

Pursue an opportunity to author a white paper or journal article.

Thank you!



CBER-BESTIM@fda.hhs.gov



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TEFCA Update

Highlighting policy and participation information

Mike Yackanich



Designated Qualified Health Information Networks



Designated
QHINs

eHealth
Exchange™

Epic Nexus

 **HEALTH®
GORILLA**

KONZA HEALTH
The Connections to Make a Difference

MEDALLIES®
A CENTAURI HEALTH SOLUTIONS COMPANY

 **Kno2®**

 **commonwell®**
HEALTH ALLIANCE

eClinicalWorks
PRISMANet

surescripts
Health Information Network™

 **Netsmart**

ORACLE Health
Information Network, Inc.™





eHealth Exchange QHIN Participant Stages

Live



2 Federal Agencies,
3 HIEs, and
Nationwide Public Health

Testing



4 HIEs, Nationwide Dialysis Centers

Intent to Participate



1 Payer Platform, 9 HIEs



eHealth Exchange Hub

Environment Upgrade Project

Mike Yackanich



Hub Upgrade

What?

A version upgrade of the technology platform to the latest version of InterSystems HealthShare and IRIS for Health.

Why?

New features, performance and stability improvements, and preparation for new use cases and workflows.

When?

- The upgrade project kicked off in February 2026.
- A cloned environment was provisioned to test/validate the upgrade to ensure services will continue to function as expected.
- Changes to impacted customizations are in progress.
- Code freeze scheduled to begin on 4/27.

Impacts?

Overarching goal is that there will be no service interruption during the upgrade. A code freeze will be required though. Onboarding and configuration updates can continue to be performed, as needed, during the duration of the code freeze.





eHealth Exchange Hub

IP Address Range Expansion

Mike Yackanich



IP Address Expansion

What?

- Adding an additional public IP address to our existing IP range.
 - eHealth Exchange and Carequality network connections only.
 - Does NOT impact QHIN nor FHIR connections.
- Our FQDN(s) will resolve to both the existing and new IP address.
- Outbound requests from our systems may originate from either IP.

Why?

- Capacity expansion – supporting increased traffic and system load.
- Ensures continued performance and availability as usage scales.

When?

- Target timeframe: Within the next 3–4 weeks (i.e., before May).
- Specific date/maintenance window TBD (will be communicated in advance).



IP Address Expansion

New IP Addresses

Non-Production	Production
68.169.207.182	68.169.207.183

What do I need to do?

- If your organization employs inbound or outbound IP address firewall allowlisting, the additional eHealth Exchange public address must be added to those lists.
 - **Inbound allowlist:** Add the new IP address to allow traffic *from* our systems
 - **Outbound allowlist:** Add the new IP address to allow traffic *to* our FQDN

What Testing is needed?

- Connectivity FROM your organization TO eHx
 - telnet hub001val.ehealthexchange.org 443
 - telnet hub001prod.ehealthexchange.org 443
- Connectivity TO your organization FROM eHx
 - eHealth Exchange will be running connectivity reports to ensure

IP Address Expansion

Current State

IP Address	Network	Environment	Fully Qualified Domain Name (FQDN)
164.52.129.168	eHx / CQ (CONNECT)	TEST	hub002val.ehealthexchange.org
164.52.129.166	eHx / CQ (CONNECT)	VAL	hub001val.ehealthexchange.org
164.52.129.167	eHx / CQ (CONNECT)	PROD	hub001prod.ehealthexchange.org
164.52.129.186	FHIR	TEST	fhir002val.ehealthexchange.org
164.52.129.185	FHIR	VAL	fhir001val.ehealthexchange.org
164.52.129.187	FHIR	PROD	fhir001prod.ehealthexchange.org
164.52.129.164	QHIN	TEST	qhin001tst.ehealthexchange.org
164.52.129.164	QHIN	VAL	qhin001val.ehealthexchange.org
164.52.129.164	QHIN	PROD	qhin001prod.ehealthexchange.org

Future State

IP Address	Network	Environment	Fully Qualified Domain Name (FQDN)
164.52.129.168	eHx / CQ (CONNECT)	TEST	hub002val.ehealthexchange.org
164.52.129.166	eHx / CQ (CONNECT)	VAL	hub001val.ehealthexchange.org
68.169.207.182	eHx / CQ (CONNECT)	VAL	hub001val.ehealthexchange.org
164.52.129.167	eHx / CQ (CONNECT)	PROD	hub001prod.ehealthexchange.org
68.169.207.183	eHx / CQ (CONNECT)	PROD	hub001prod.ehealthexchange.org
164.52.129.186	FHIR	TEST	fhir002val.ehealthexchange.org
164.52.129.185	FHIR	VAL	fhir001val.ehealthexchange.org
164.52.129.187	FHIR	PROD	fhir001prod.ehealthexchange.org
164.52.129.164	QHIN	TEST	qhin001tst.ehealthexchange.org
164.52.129.164	QHIN	VAL	qhin001val.ehealthexchange.org
164.52.129.164	QHIN	PROD	qhin001prod.ehealthexchange.org



My Directory Portal

Human-readable, self-service experience with a web-based interface for administrative and onboarding teams

Tiffanie Hickman



My Directory Portal

- The My Directory Portal is now being rolled out to participants
- The My Directory Portal can help manage sub-participants identification to support OPP #17
- Key Highlights:
 - The import feature makes it easy to upload several sub-participants at a time
 - Participants can update contacts, addresses and endpoints
 - Run reports and review data
- Email administrator@ehealthexchange.org for access





New/Updated Web Content

Improvements to Testing and Directory Resources

Tina Feldmann



Resources

Summary:

- **UPDATED** page layout
- **NEW** Testing Program resources
- **NEW** Directory Management section
- **NEW** Webinar & Training section

<https://ehealthexchange.org/resources-library/>

The screenshot displays the eHealth Exchange Resource Library website. At the top, there is a logo with the letter 'e' inside a hexagon, followed by the text 'Resource Library' and a subtitle: 'Explore our library of resources dedicated to the eHealth Exchange network, platform, policies, and additional connections'. Below this, the page is organized into a grid of resource categories, each with an icon and a list of links:

- Participation** (Gear icon):
 - How to Join
 - Application Package
 - Benefits of Participation
 - Pricing
 - All Network Participants
 - Promoting Interoperability Programs
- Network** (Network icon):
 - DURSA Trust Agreement
 - Technical Specifications
 - Policies
 - Policy Changes
 - Operational Notices
- Hub Platform** (Hub icon):
 - Hub Platform
 - Hub FAQs
 - Hub Setup Checklist
 - Sample Test Patients
 - Self-Service Hub Initiator Testing Document
 - Dashboard Login
- Testing** (Testing icon, marked with a star):
 - Testing Program
 - Participant Testing
 - Validated Product Testing
 - Current Listing of Validated Products
 - Technical Specifications
 - Testing References: Tools and Guides
 - Testing FAQs
- Directory Management** (Directory icon, marked with a star):
 - Directory
 - My Directory Portal
 - FHIR Directory API
 - Accessing Directories via FHIR
- QHIN** (QHIN icon):
 - TEFCA Requirements
 - TEFCA Requirements Checklist
 - TEFCA FAQs
 - QHIN Policy Changes
 - QHIN Operational Notices
 - TEFCA Webinars
 - RCE Resources
- Carequality** (Carequality icon):
 - Obligations to Exchange with Carequality
 - Carequality Connectivity Steps
- Webinars & Training** (Webinars icon, marked with a star):
 - All Participant Monthly Calls
 - Content Testing Overview Webinar
 - Hub Dashboard Training
 - My Directory Portal Demo
 - OPP #17 Sub-Participant Identification to Support Trust and Transparency Information Webinar
 - TEFCA Webinars
- Previous Annual Meetings** (Meetings icon):
 - 2025 Annual Meeting
 - 2024 Annual Meeting
 - 2023 Annual Meeting
 - 2022 Annual Meeting
- Spotlights** (Spotlight icon):
 - FDA Adverse Events Case Study
 - Document Handling Transparency Best Practices
- Corporate Policy** (Policy icon):
 - Information Handling Practice Statement
 - Privacy Policy





Testing Program

Participant Testing
Validated Product
Testing

Testing References:
Tools and Guides

Testing FAQs



Testing Program – Determine Your Path

All participants and products must complete testing to ensure they meet eHealth Exchange standards for interoperability, security, and performance.



Participant Testing

For organizations joining the network or exchanging data directly

- **Onboarding and conformance testing**
Confirms your systems meet interoperability and security standards
- **Prepares you for live data exchange**
Confirms your organization can reliably and securely send, receive, and respond to data requests
- **Required for participation**
A mandatory step for all organizations before going live on the network

[LEARN ABOUT PARTICIPANT TESTING →](#)



Product Testing

For vendors validating solutions for use on the network

- **Validated for interoperability**
Conformance and interoperability testing for vendor solutions
- **Faster onboarding for your clients**
Helps reduce testing effort, time, and cost for participating organizations using your product
- **Recognition across the network**
Your product is listed as an approved, trusted solution on our website

[LEARN ABOUT PRODUCT TESTING →](#)

Participant Testing

<https://ehealthexchange.org/testing-program/participant-testing/>

Participant Testing

Demonstrating technical and interoperability readiness for network participation

What is Participant Testing?

Participant testing is the process organizations undergo to confirm that their systems meet eHealth Exchange technical and interoperability requirements as outlined in the DURSA.

Participant testing is required for:

- New Applicants**
Testing is necessary for all new applicants that are looking to join eHealth Exchange.
- Existing Participants**
All current participants must test when making major changes or updates to their systems.

Why It Matters

Successful testing confirms your system complies with eHealth Exchange standards so you can:

- Connect with health systems, HIEs, payers, public health, federal agencies and more
- Exchange high quality data securely and with confidence
- Avoid delays caused by interoperability or data quality issues

This testing helps ensure that health information exchanged across the network is consistent, usable, and meets national standards.

What's Included

- Smoke Testing**
Checks basic connection and system behavior to confirm stability and readiness.
 - Validate certificates are in place for successful bidirectional exchange
 - Perform Patient Discovery, Document Query, and Document Retrieve tests.
 - Fees may be waived if using a [Qualified Technology Solution \(QTS\)](#)
- Content Testing**
Ensures that all clinical data exchanged is truly interoperable and usable.
 - Confirm documents you exchange, like C-CDA, meets structural and semantic standards
 - Free for all participants
- Security Testing**
Verifies your system meets required security standards.
 - If you use an [eHealth Exchange Validated Product](#), security tests and some fees may be waived.
- Access Consent Policy Testing (when applicable)**
This test is required when patient authorization is needed to access medical records.
 - Free for all participants

Note: All testing is done using the Interoperability Testing Platform (ITP) supplied by [The Sequoia Project](#).

What You'll Receive

After testing is completed, you'll get a Participant Testing Summary Report that:

- Shows your test results
- Confirms where you meet standards
- Highlights areas that may need work before going live on the network

Next Steps - Kickoff Call

Organizations preparing to join eHealth Exchange will attend a kickoff call to review the onboarding process, testing resources, and anticipated timeline.

In this session, we will review the following:

- Onboarding Process and Checklist
- Testing Process
- Activation Steps
- Hub Dashboard
- Post-Activation Steps

Testing tools and guides

Access step-by-step instructions for each test type and sample files used in testing.

[TOOLS AND GUIDES](#)

Frequently asked questions


Explore answers to the most common topics related to participant testing.

[VIEW FAQS](#)

Questions about testing?

Have more questions about Participant Testing? Ask one of our experts.

[EMAIL US](#)



Product Testing

<https://ehealthexchange.org/testing-program/product-testing/>

Become a Validated Product

Vendor testing to support faster, simpler participant onboarding

What is Product Testing?

Product testing is available to health IT vendors who want their product validated by eHealth Exchange. Validated products help reduce certain testing requirements and fees for new participants that choose to onboard using that product.

How to Get Started

1. Submit the Product Testing Application and Product Testing Services Agreement.
2. Attend a kickoff call to review testing resources and requirements.
3. Complete all required tests.

Validated Seal

After successful testing, your product earns the **eHealth Exchange Validated** seal you can use in marketing and sales materials.

Why It Matters

Earning an eHealth Exchange Validated Product designation is a mark of confidence that the product works reliably with the exchange standards.

Being a Validated Product means:

- ✓ Your product has passed a defined set of conformance and interoperability tests required by eHealth Exchange.
- ✓ Organizations that onboard using your product can skip some security tests and pay lower testing fees during Participant Testing — saving time and cost.
- ✓ Your product is recognized by eHealth Exchange and featured in the public Validated Products list.

What's Included in Validated Product

- Smoke Testing**
Checks basic conformance to confirm stability.
 - Validate certain bidirectional tests
 - Perform Patient and Document tests
- Content Testing**
Ensures that all content is interoperable and meets structure requirements.
 - Confirm document structure meets structure requirements
- Security Testing**
Verifies your system meets security standards.
- Access Consent Policy Testing (when applicable)**
This test is required when patient authorization is needed to access medical records.
 - Free for all participants

Helpful Resources

- Application Form**
Start by downloading and submitting the product testing application and services agreement.
[DOWNLOAD AGREEMENT →](#)
- Testing Tools and Guides**
Access step-by-step instructions for each test type and sample files used in testing.
[TOOLS & GUIDES →](#)
- Questions about validation?**
Have more questions about Validated Product Testing? Ask one of our experts.
[EMAIL US →](#)

Ready to Validate Your Product?

Complete the agreement today and set your product up for success on the eHealth Exchange network.

[Download Agreement](#)

Note: All testing is done using the Interoperability Testing Platform (ITP) supplied by [The Sequoia Project](#).

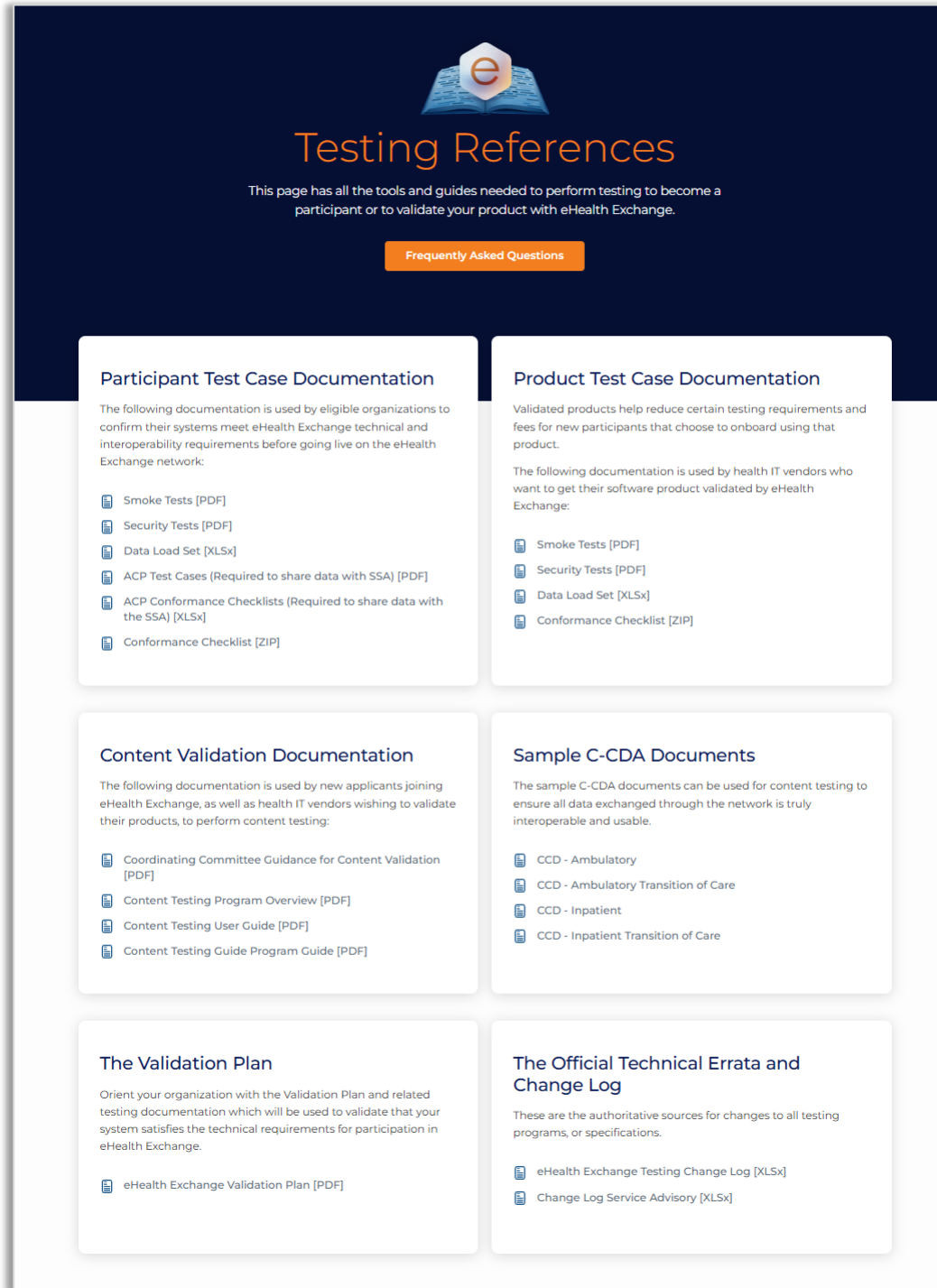



Add'l Updates

Summary:

- **UPDATED** content to make it current and accurate
- **UPDATED** Testing FAQs
- **ADDED** Sample C-CDA Documents

<https://ehealthexchange.org/testing-program/testing-references/>




Testing References
This page has all the tools and guides needed to perform testing to become a participant or to validate your product with eHealth Exchange.

[Frequently Asked Questions](#)

Participant Test Case Documentation

The following documentation is used by eligible organizations to confirm their systems meet eHealth Exchange technical and interoperability requirements before going live on the eHealth Exchange network:

- [Smoke Tests \[PDF\]](#)
- [Security Tests \[PDF\]](#)
- [Data Load Set \[XLSx\]](#)
- [ACP Test Cases \(Required to share data with SSA\) \[PDF\]](#)
- [ACP Conformance Checklists \(Required to share data with the SSA\) \[XLSx\]](#)
- [Conformance Checklist \[ZIP\]](#)

Product Test Case Documentation

Validated products help reduce certain testing requirements and fees for new participants that choose to onboard using that product.

The following documentation is used by health IT vendors who want to get their software product validated by eHealth Exchange:

- [Smoke Tests \[PDF\]](#)
- [Security Tests \[PDF\]](#)
- [Data Load Set \[XLSx\]](#)
- [Conformance Checklist \[ZIP\]](#)

Content Validation Documentation

The following documentation is used by new applicants joining eHealth Exchange, as well as health IT vendors wishing to validate their products, to perform content testing:

- [Coordinating Committee Guidance for Content Validation \[PDF\]](#)
- [Content Testing Program Overview \[PDF\]](#)
- [Content Testing User Guide \[PDF\]](#)
- [Content Testing Guide Program Guide \[PDF\]](#)

Sample C-CDA Documents

The sample C-CDA documents can be used for content testing to ensure all data exchanged through the network is truly interoperable and usable.

- [CCD - Ambulatory](#)
- [CCD - Ambulatory Transition of Care](#)
- [CCD - Inpatient](#)
- [CCD - Inpatient Transition of Care](#)

The Validation Plan

Orient your organization with the Validation Plan and related testing documentation which will be used to validate that your system satisfies the technical requirements for participation in eHealth Exchange.

- [eHealth Exchange Validation Plan \[PDF\]](#)

The Official Technical Errata and Change Log

These are the authoritative sources for changes to all testing programs, or specifications.

- [eHealth Exchange Testing Change Log \[XLSx\]](#)
- [Change Log Service Advisory \[XLSx\]](#)





Directory Management

Directory
My Directory Portal
FHIR Directory API

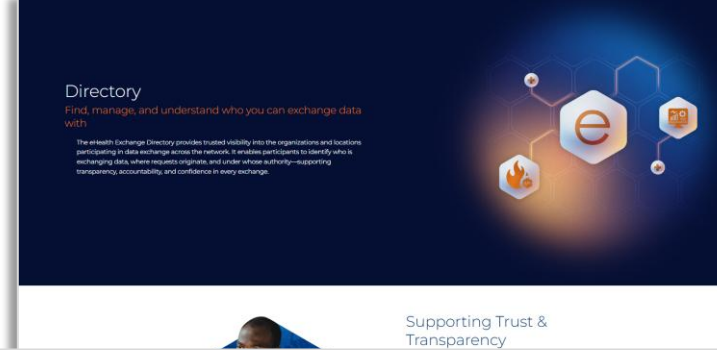


Directory

Summary:

- **NEW** Directory page
- **NEW** My Directory Portal page
- **NEW** FHIR Directory API page
- **UPDATED** FHIR API Resources

<https://ehealthexchange.org/directory/>



Directory
Find, manage, and understand who you can exchange data with.

The eHealth Exchange Directory provides trusted visibility into the organizations and locations participating in data exchange across the network. It enables participants to identify who is exchanging data, where requests originate, and under whose authority—supporting transparency, accountability, and confidence in every exchange.

Supporting Trust & Transparency



Two Ways to
Access and Manage Your Directory Endpoints

Participants can access and manage directory information in more than one way, depending on their workflow and technical needs. All access methods connect to the same underlying directory data and support compliance with QPP-17.



My Directory Portal

A human-readable, self-service experience

The My Directory Portal is a web-based interface designed for administrative and onboarding teams. It allows participants to manage their organization and sub-participant directory entries through a guided, easy-to-use experience.

Best for:

- Administrators on onboarding teams
- Manual management of sub-participants
- Annual reviews and updates

[ACCESS THE MY DIRECTOR PORTAL →](#)



FHIR Directory API

Read only, system-to-system directory access

The FHIR Directory API enables participants to integrate directory consumption into their systems and workflows. It is designed for organizations that require large-scale, real-time access to directory data.

Best for:

- Technical and engineering teams
- Automated directory consumption
- System-to-system integrations

[LEARN MORE ABOUT THE FHIR DIRECTORY API →](#)



Two Directory Tools. Flexible Access.

Whether you manage directory information using the My Directory Portal or automated consumption using the FHIR Directory API, the eHealth Exchange Directory provides a single source of truth for the eHealth Exchange network—supporting trust, transparency, and confident data exchange across the network.

and the FHIR Directory API. Participants manage directory updates by submitting changes to eHealth Exchange for vetting. eHealth Exchange works with the Integrated Governance Entity (IGE) to synchronize those changes to the national TRACON directory.

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My Directory Portal

<https://ehealthexchange.org/my-directory-portal/>



My Directory Portal

A simple, secure way to manage directory information across the eHealth Exchange network

What is the My Directory Portal

The My Directory Portal is a web-based interface that allows participants to manage and maintain directory information for the eHealth Exchange network.

Designed for administrative and onboarding teams, the portal provides a human-readable, self-service way to keep directory data accurate, current, and transparent—supporting trusted exchange across the network.



What you can do in the Portal



Manage organization and sub-participant directory entries



Update contacts, addresses, endpoints, and organizational details



Import or export directory data in bulk



Download the directory in multiple formats



Monitor directory history and changes over time



Maintain production and non-production environments



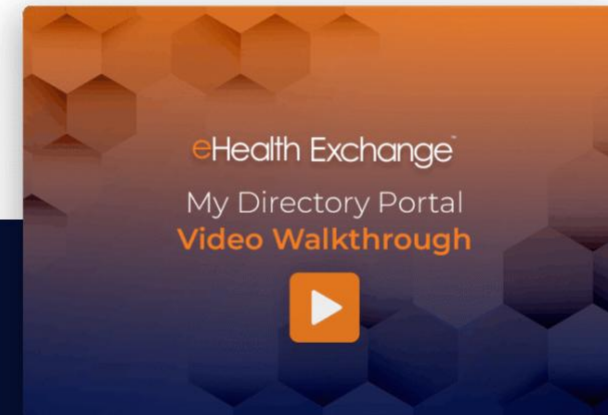
Why it's important

The My Directory Portal supports **OPPI-17** by enabling organizations to clearly identify themselves and their sub-participants in the eHealth Exchange directory.

This helps participants understand who is requesting data and why, strengthening transparency and trust across the network for everyone involved.

See the

See the My Directory Portal in Action



Get a quick walkthrough of the My Directory Portal and learn how participants manage directory information to support trust, transparency, and compliance.

Watch the video 

Annual Review Requirement

As a reminder, eHealth Exchange participants are required to review and update directory information annually. The My Directory Portal makes it easy to meet this obligation in one place.

Get Started

Participants can request access and log in at: mydirectory.ehealthexchange.org

[Request Access](#)

Training resources and support are available within the portal.



FHIR Directory API



FHIR Directory API

Read only, system-to-system access to the eHealth Exchange directory

What is the FHIR Directory API

The FHIR Directory API provides secure, system-to-system access to eHealth Exchange directory information. Designed for participants that want to consume directory data through technical integrations, it supports automated workflows and large-scale data retrieval.



What you can do with the FHIR Directory API

The FHIR Directory API provides structured, standards-based access aligned with modern interoperability frameworks enabling participants to:



Access production and non-production environments



Integrate directory data directly into internal systems



Support localized real-time operational workflows



Download and transform directory data for internal consumption



Monitor directory history and changes over time



Need to update directory data?

Any time you introduce a new subparticipant to the network, the directory needs to be updated with that information immediately.

The [My Directory Portal](#) enables organizations to update their sub-participants in the eHealth Exchange directory, ensuring compliance with [QPP-17](#).

This helps participants understand who is requesting data and why, strengthening transparency and trust across the network for everyone involved.

Note: As a reminder, eHealth Exchange participants are required to review and update directory information annually.

<https://ehealthexchange.org/fhir-directory-api/>

Carequality and TEFCA™ participants

Participants connected to Carequality and/or the eHealth Exchange QHIN™ access and download directory data through the same FHIR API framework



Who It's For

The FHIR Directory API is ideal for participants who have technical or engineering resources who can leverage system-to-system APIs to consume directory information.

Helpful Resources

FHIR API Directories - Technical Overview	https://ehealthexchange.org/content/uploads/2026/03/Technical-Highlights-FHIR-API-Directories-January-2026.pdf
Technical Specifications	https://ehealthexchange.org/testing-program/technical-specifications/
Accessing Participant Directories via FHIR	https://ehealthexchange.org/wp-content/uploads/2022/08/accessing-the-eHealth-Exchange-Directories-via-FHIR.pdf

Get Started

Participants can request a FHIR API key and receive support by contacting an eHealth Exchange administrator.

Contact us

FHIR Directory API

Under the [FHIR Directory API](#) there is a section titled "Helpful Resources" with a link to [FHIR API Directories – Technical Overview](#).

The FHIR API Directories Technical Overview provides information on accessing the network directories using the FHIR API, including access to:

- The eHealth Exchange network directories (VAL and PROD)
- The Carequality clone directories (STAGE AND PROD) with a Carequality subscription (**read-only access**)
- The QHIN directories (DEV, STAGE and PROD) with a QHIN subscription (**read-only access**)

NOTE: To avoid providing the full directory API URLs on a publicly accessible website, we have omitted the hostname (FQDN) information from the [FHIR API Directories – Technical Overview](#) publication. Email administrator@ehealthexchange.org to receive a slide deck with the full URLs for the FHIR directory APIs.



Resources

Locate all the new content for
Testing and Directory Management
from the Resource Library

<https://ehealthexchange.org/resources-library/>

Resource Library
Explore our library of resources dedicated to the eHealth Exchange network, platform, policies, and additional connections

- Participation**
 - How to Join
 - Application Package
 - Benefits of Participation
 - Pricing
 - All Network Participants
 - Promoting Interoperability Programs
- Network**
 - DURSA Trust Agreement
 - Technical Specifications
 - Policies
 - Policy Changes
 - Operational Notices
- Hub Platform**
 - Hub Platform
 - Hub FAQs
 - Hub Setup Checklist
 - Sample Test Patients
 - Self-Service Hub Initiator Testing Document
 - Dashboard Login
- Testing** ★
 - Testing Program
 - Participant Testing
 - Validated Product Testing
 - Current Listing of Validated Products
 - Technical Specifications
 - Testing References: Tools and Guides
 - Testing FAQs
- Directory Management** ★
 - Directory
 - My Directory Portal
 - FHIR Directory API
 - Accessing Directories via FHIR
- QHIN**
 - TEFCA Requirements
 - TEFCA Requirements Checklist
 - TEFCA FAQs
 - QHIN Policy Changes
 - QHIN Operational Notices
 - TEFCA Webinars
 - RCE Resources
- Carequality**
 - Obligations to Exchange with Carequality
 - Carequality Connectivity Steps
- Webinars & Training** ★
 - All Participant Monthly Calls
 - Content Testing Overview Webinar
 - Hub Dashboard Training
 - My Directory Portal Demo
 - OPP #17 Sub-Participant Identification to Support Trust and Transparency Information Webinar
 - TEFCA Webinars
- Previous Annual Meetings**
 - 2025 Annual Meeting
 - 2024 Annual Meeting
 - 2023 Annual Meeting
 - 2022 Annual Meeting
- Spotlights**
 - FDA Adverse Events Case Study
 - Document Handling Transparency Best Practices
- Corporate Policy**
 - Information Handling Practice Statement
 - Privacy Policy





Marketing Updates

News, events, webinars, and more...



Recent Publications & Coverage

- MAR 25** • [From Trust to Transformation: The Next Era of Payer-Provider Partnership - KLAS Research](#)
- MAR 2** • [How EHR sharing speeds up disability applications for patients | TechTarget](#)
- FEB 15** • [Social Security Expands TEFCA Link To Speed Disability Claims](#)
- FEB 11** • [Preparing providers and payers for interoperability mandates | Healthcare Finance News](#)



Upcoming Events

4th ANNUAL

Spring Payer Issues
Roundtable

[Becker's Healthcare Event Link](#)
Apr 13-14 | Chicago, IL



[eSolutions Xchange Event Link](#)
Apr 19-22 | Chattanooga, TN



[InterSystems READY 2026](#)
Apr 27-30 | National Harbor, MD



[KLAS K2 Collaborative Payer/Provider Summit 2026](#)
May 5-7 | Salt Lake City, UT



Upcoming eHealth Exchange Monthly Webinars



[Technical Workgroup](#)

May 7th | 4-5:00 PM ET



[All Participant Call](#)

May 14th | Noon-1PM ET





eHealth Exchange

ANNUAL MEETING

LOST PINES RESORT & SPA

Save the Date

TUESDAY

OCT **27** 2026

AUSTIN, TX

ehealthexchange.org/annual-meeting

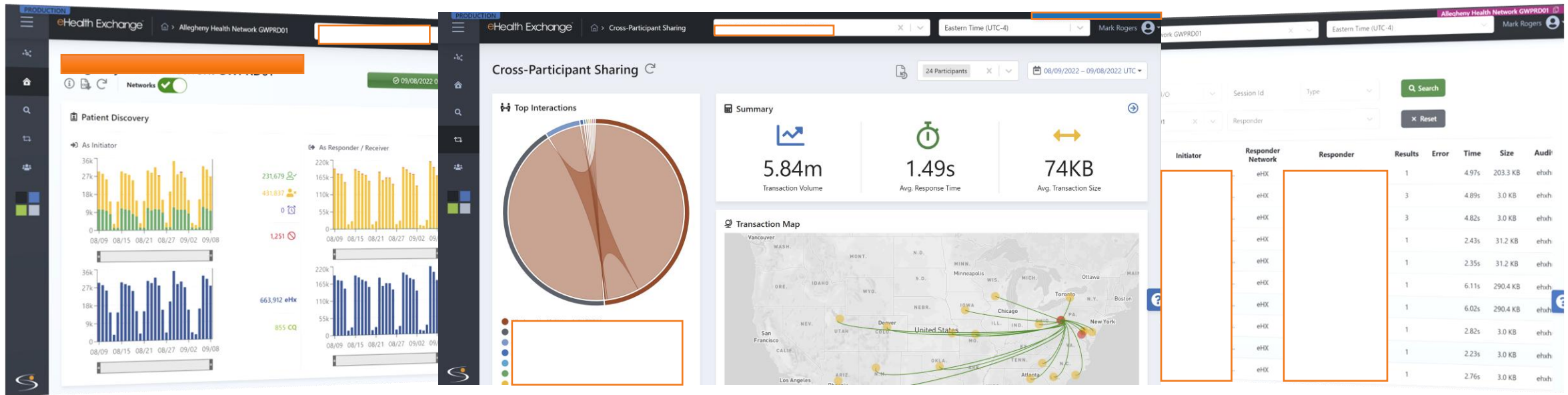


Resources

Hub dashboard, updating your info, how to get in touch...



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?

Access Hub Dashboard: <https://insightsprod.ehealthexchange.org/#/hub>



Monthly Technical Workgroup

- Every 1st Thursday 4-5pm Eastern
- Typical Topics
 - Technical Specifications
 - Testing
 - Hub Updates
 - Capacity planning
- [Register Here](#)



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.



How might I obtain assistance?

What	Who	How
Certificates	DirectTrust Support	support@directtrust.zohodesk.com
Technical Support	Technical Support	servicedesk@hub.ehealthexchange.org
Testing Questions	Testing Team	testing@ehealthexchange.org
Questions about the DURSA, policy, or anything else!	Administrator	administrator@ehealthexchange.org

Visit: <https://ehealthexchange.org/contact-us/>



The logo features the text "eHealth Exchange" in a white, sans-serif font. The lowercase "e" is highlighted in orange. A small "TM" trademark symbol is positioned to the upper right of the word "Exchange".

eHealth Exchange™

ehealthexchange.org