

carequality

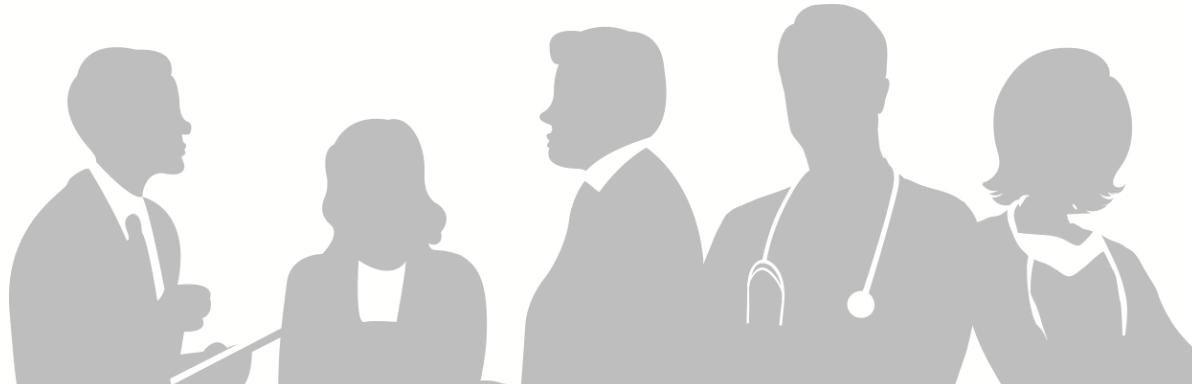
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Carequality Monthly Information Call

October 29, 2015

Agenda

- Carequality Intro
- Participation Opportunities
- Industry and Government Relations
- Implementation Guide Feedback
- Initial Rollout Update



The Challenge



What if you had a cell phone plan that only allowed you to call other customers of your carrier?

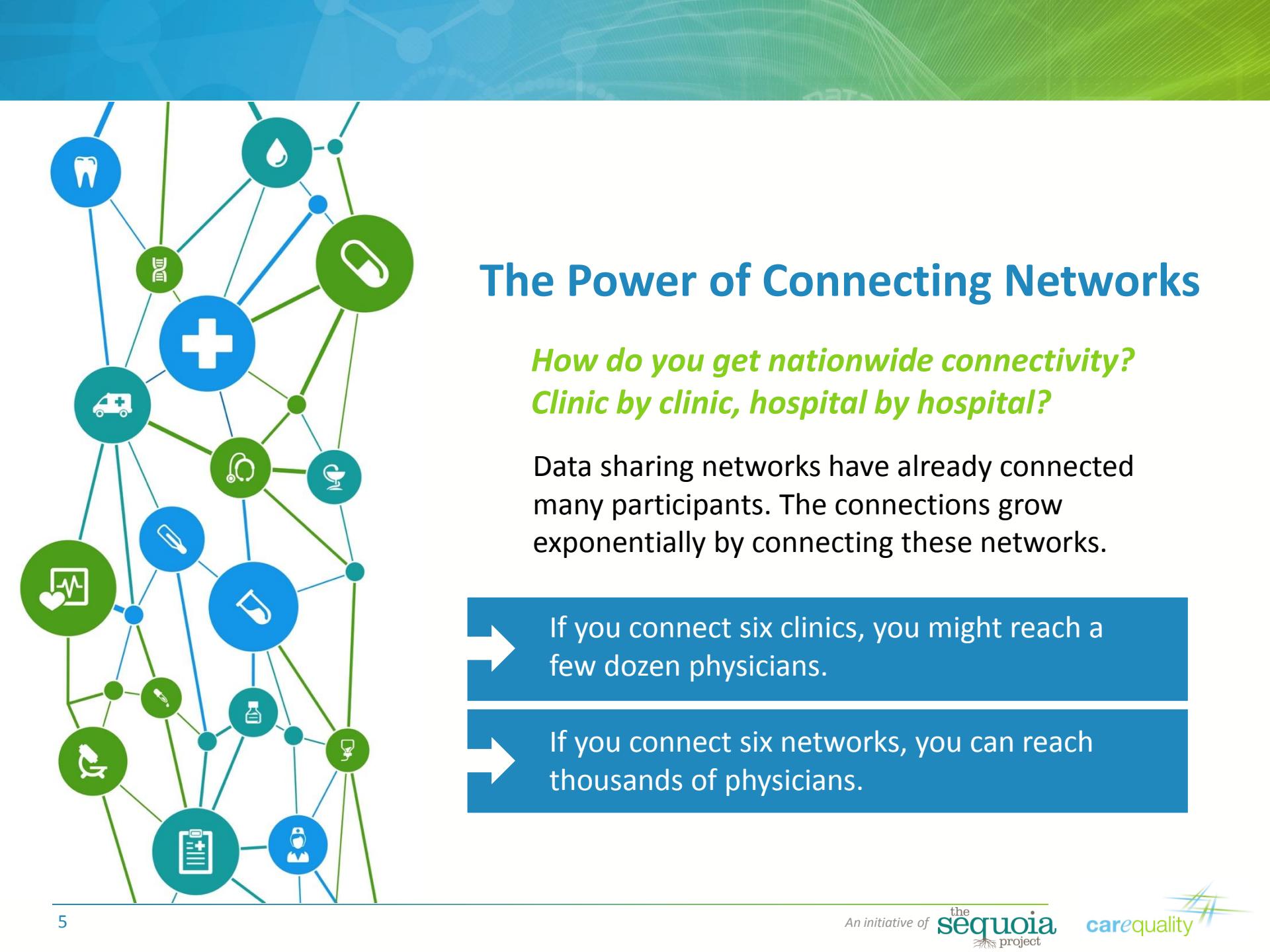
That's the situation for most healthcare providers today, when they join a data sharing network.

The Solution

Carequality creates a standardized, national-level interoperability framework to link all data sharing networks



Carequality is creating a web of interconnected networks



The Power of Connecting Networks

*How do you get nationwide connectivity?
Clinic by clinic, hospital by hospital?*

Data sharing networks have already connected many participants. The connections grow exponentially by connecting these networks.

→ If you connect six clinics, you might reach a few dozen physicians.

→ If you connect six networks, you can reach thousands of physicians.

Participation Opportunities

Carequality Member Survey

- We want to hear from you!
- If you're a member and haven't yet responded to the survey, please do
- We'd like your feedback on what's going well, what could be improved, and where we could provide additional value



Advisory Council Update

- **Thanks to all who applied for the Advisory Council!**
- The Nominating Committee will meet next week to begin forming the recommended member slate
- Some stakeholder categories did have more applicants than available seats under the current guidelines from the Steering Committee
- For a few others, we will be reaching out to appropriate stakeholder groups to ensure appropriate representation

Industry and Government Relations

The Sequoia Project's Role

The Sequoia Project is the trusted, independent convener of industry and government

Works to address the challenges of secure, interoperable nationwide health information exchange (HIE).



SECURE



INTEROPERABLE



NATIONWIDE

Marketing and Communications

Keeping Members Better Informed

- eNewsletter
- Monthly Informational Call
- Member Survey
- Conferences
- Webinars
- Email Updates

Increasing Awareness in the Industry and On the Hill

- Patient Matching White Paper
- HIMSS 2016
- Conferences
- Media Outreach
- Carequality Blog
- Guest Blogging

Industry Collaboration

- Co-hosted forum with HIMSS in July, with joint sign on letter to HHS regarding MU modifications (Aug 2015)
- Developed shared position statements on interoperability with top 5 recommendations to Senate HELP (Sept 2015)
- Increasing engagement and coordination with key groups – AMA, CCC, CHIME, eHI, EHRA, HIMSS, HL7, IHE, WEDI
- Patient Identity paper – co-publish research with CCC (Nov 2015)

Government Collaboration

- With federal agencies
 - DoD
 - VA
 - ONC
 - CMS
 - SSA
- On the Hill
 - Sharing our perspective with Congressional staffers responsible for health IT legislation
 - Providing shared feedback in collaboration with others in the industry

Implementation Guide Feedback – Update from September Meeting

Non-Discrimination Principle

From the Carequality Principles of Trust:

Carequality Implementers will promote interoperability by not discriminating against other Carequality Implementers.

Carequality's goal is to enhance and enable interoperability by reducing the technical and policy barriers that exist today. This goal cannot be realized if Implementers selectively restrict interoperability with other Implementers....

Non-Discrimination – Initial Implementation Guide

- Interpreted the prohibition on selective exchange for treatment purposes as effectively prohibiting the charging of fees between implementers
 - Fees can't be charged, effectively, without a legal agreement
 - The need for separate legal agreements between parties has long been a barrier to widespread exchange
- Advisory Council feedback: prohibiting fees between implementers could significantly impact adoption of the Carequality framework
- Initial Rollout Group feedback: changing the model at this point introduces complexities and recalibration of strategies, could result in delayed adoption of the Carequality framework

Steering Committee Decision

- Any choice could result in unforeseen consequences
- More study is needed, and until the Carequality Framework is live any study would involve speculation and many unknowns
- Carequality has a business need to move forward as quickly as reasonable
- **Therefore:** Carequality will move forward for a pilot period of at least 6 months with the originally proposed model, in which Implementers may not charge fees to each other for treatment-based queries.
 - During the pilot period, additional study will be informed by practical experience.
 - A long-term policy will be adopted based on further study and lessons learned during the pilot period.

Initial Rollout Update

Initial Rollout Participants



eClinicalWorks



Initial Rollout - Summary

- A number of work products are in proposed final form for adoption:
 - Technical specs
 - Legal agreements
 - Implementation Guide
 - Dispute resolution process
- Others are nearing final form:
 - Application form and review process
 - Pricing and incentive model

Legal Agreements

- Background:
 - Carequality Connected Agreement (CCA) and Directory Sub-Entry (DSE) Terms implement the Principles of Trust in legally binding terms
 - Broadly reviewed by Advisory Council, Steering Committee, and Initial Rollout group late Spring and early Summer
 - In-person meeting of initial rollout group in late August allowed for quick progress on many areas
 - Subsequent drafts circulated in September and October for further feedback
- Current status: Proposed final version with Steering Committee and Sequoia Project Board for adoption

Implementation Guide

- Background:
 - Guide details both technical specs and business/policy requirements for a specific use case (initial use case is Query-Based Document Exchange)
 - Business and policy requirements developed by Trust Framework Work Group
 - Review by Advisory Council and Initial Rollout group
 - Significant debate through September and October on key provisions
- Current status: Proposed final version with Steering Committee for adoption

Technical Specs

- Background:
 - Technical specs are part of the Query-Based Document Exchange use case Implementation Guide
 - Specs were developed by the Query Work Group
 - Public comment period ended mid-July
 - Final meeting of Query Work Group 9/21
- Current status: Proposed final version with Steering Committee for adoption (timing linked to rest of Implementation Guide)

Dispute Resolution Process

- Background:
 - Process referenced in Carequality Connected Agreement but separately specified
 - Provides interpretation of Carequality requirements in order to help resolve disputes among Implementers and DSEs
 - Feedback provided by initial rollout group during late August in-person session
 - Subsequent updates to add appeal process and specify process when Carequality is a party to the dispute
- Current status: Proposed final version with Steering Committee for adoption

Implementer Application Form and Review Process

- Background:
 - Focused on an Implementer's obligations under the Carequality Connected Agreement
 - What checks can we perform to provide assurance that an applicant can meet its obligations as an Implementer?
 - Need to balance operational burden (and accompanying cost) with need to establish trust among Implementer community
 - Draft form distributed to initial rollout group for feedback
- Current status: Proposed final version in progress, along with review process guidelines

Joining the Initial Rollout

- The Initial Rollout's first phase, adopting the Carequality legal framework, is drawing toward completion
- The second phase, production exchange under the Query-Based Document Exchange Implementation Guide, is getting underway
- If your organization is interested in participating and would like to set up time to discuss options, contact admin@carequality.org

Thank You!