

Introducing the California Data Exchange Framework - Why Would Your Community-Based Organization Want to Sign the DSA?

Introduction

The Senior Services Coalition has been advocating to improve care coordination across medical and social service organizations to improve health and life outcomes for older adults living in Alameda County for over a decade. One way in which care coordination could be improved is by building a robust, secure data exchange hub among partnering agencies.

California is in the process of implementing the [Data Exchange Framework \(DxF\)](#) which is California's first-ever statewide [Data Sharing Agreement \(DSA\)](#) that requires the secure and appropriate exchange of health and human service information to enable providers to work together and improve an individual's health and wellbeing.

The CalHHS Health and Human Services Data Exchange Framework (DxF) comprises a single Data Sharing Agreement (DSA) and common set of Policies and Procedures (P&Ps) that will govern the exchange of health and social services information among health care entities and government agencies beginning January 31, 2024 for mandatory signatories including general acute care hospitals, physician organizations and medical groups, skilled nursing facilities, health service plans and disability insurers, Medi-Cal managed care plans, and clinical laboratories except for those required signatories that meet the criteria for delayed exchange.

Finalized on July 1, 2022, the DxF was developed with input from a broad set of stakeholders, including a Stakeholder Advisory Group as required by AB 133. The legislation mandates that a broad spectrum of healthcare organizations execute the Framework's DSA by January 31, 2024, and exchange or provide access to health information with other mandated organizations by January 31, 2024. **Note: January 31, 2024 only applies to mandatory signatories, does not apply to social service organizations since they are considered voluntary signatories and required signatories that meet the criteria with delayed exchange. An organization that signs today as a voluntary signatory (or required signatories that meet the criteria for delayed exchange) will not be required to exchange data until January 31, 2026.**

For additional information about what this might mean to your organization to sign the DSA, please see the [Data Exchange Framework\(FAQs\)](#).

To support the implementation of the DxF, the state is providing funding to build the technical capability of both medical and social service organizations. **The third and final round of funding opened on October 16 and closes December 15, 2023.** The grant application is simple and Technical Assistance is available to walk you through the application process. Please see the [DSA Application Template](#) to see what information you will need to fill out the application.

If you are interested in learning more about the Technical Assistance available, please contact Wendy Peterson at Wendy@seniorservicescoalition.org to get additional support if needed. Please see the [DSA Signatory Grants Application Guidance Document](#) by CDII for additional information about the grant application process.

A social service organization could be eligible to receive funds between \$25,000-\$50,000. In addition, if a group of organizations would like to apply together for a DxF grant, to receive up to \$500,000 under an umbrella grant. These funds can be used to:

- Identify and contract with a technology solution
- Implement a technology solution capable of supporting real-time data exchange
- Adjust, upgrade, or adopt a certified I or Other Electronic Record System
- Create and Provide Training for New Workflows

Local Opportunity: For those that are interested in pooling their DxF funds to improve care coordination across providers for up to \$500,000, Eden I&R has offered to be the lead applicant on an umbrella application. By pooling several organizations grant funds, would allow us to develop a solution to not only enable your organization to exchange data with medical providers, but provide the ability to share data to improve care coordination across our organizations as well. If you are interested, contact Alison DeJung at adejung@edenir.org.

In order to apply, your organization has to sign the DSA before applying for Round 3 funding. So we are providing background information on the DSA to help you evaluate if your organization would like to sign the DSA and apply for the funding.

The CalHHS FAQ provides up-to-date information about DxF implementation and may be updated from time to time. More information is available on the CalHHS DxF website. Please submit questions about the DxF to or directly to cdii@chhs.ca.gov.

Please see the Appendix for links to key documents referenced above to review both the DSA and the DxF Grant information.

SSC is hosting two information sessions on November 29 and 30, and “office hours” the following week for those who have questions about the DxF and DSA or need assistance with the grant application. Contact wendy@seniorservicescoalition.org for details.

Orientation to DxF and the DSA Grants for SSC Member Organizations:

- Wednesday, November 29, 2023 – 9am to 11am (last 30 minutes for office hours),
or
- Thursday, November 30, 2023 – 12:30pm to 2:30pm (last 30 minutes for office hours)

Office Hours for Questions and Assistance:

- The weeks of December 4 and 11. Please contact wendy@seniorservicescoalition.org to schedule a time.

Appendix:

Here are some key documents to review as you consider signing the DSA and applying for the DxF Grant as a single organization or joining the umbrella organization to design a solution that would improve care coordination across providers.

Most of the information around the DxF can be found at the following website:

<https://www.cdii.ca.gov/committees-and-advisory-groups/data-exchange-framework/>

First, your organization will want to review the data sharing agreement. It can be found at the following link:

[DxF Single Data Sharing Agreement Final 7.1.22 \(updated Nov 2022\)](#)

Next, review the policies and procedures. The DSA along with the DxF Policies and Procedure Procedures will help your organization define the business and technical infrastructure you will need to sign the DSA. Please use the following links to get further information around the detailed specifications of reach policy and procedure.

[DxF Glossary of Defined Terms Final v1 7.12.23](#)

[Policy and Procedure: Process for Amending the DSA Final 7.21.23](#)

[Policy and Procedure: Modifications to Policies and Procedures Final 7.21.23](#)

[Policy and Procedure: Breach Notification Final 7.1.22](#)

[Policy and Procedure: Permitted Required and Prohibited Purposes Final 7.1.22](#)

[Policy and Procedure: Requirement to Exchange Health and Social Services](#)

[Information Final 7.1.22](#)

[Policy and Procedure: Privacy and Security Safeguards Final 7.1.22](#)

[Policy and Procedure: Individual Access Services Final 11.2.23](#)

[Policy and Procedure: Data Elements to be Exchanged Final 7.1.22 \(updated Dec 2022\)](#)

[Policy and Procedure: Technical Requirements for Exchange Final 6.26.23](#)

[Policy and Procedure: California Information Blocking Prohibitions Final 7.12.23](#)

[Policy and Procedure: Qualified Health Information Organization Final 7.12.23](#)

[Policy and Procedure: Real-Time Exchange Final 7.21.23](#)

Please reference the FAQs for what it means to sign the DSA.

<https://www.cdii.ca.gov/wp-content/uploads/2023/09/Data-Exchange-Framework-FAQ-2023-9-1-011.pdf>

Next, review the information that will be needed for the DSA grant application for Round 3, please see the [DSA Application Template](#).

https://www.cdii.ca.gov/wp-content/uploads/2023/07/DSA-Signatory-Grants_Application-Template_Updated-July-2023_FINAL.pdf

For additional information about the DSA grant process, please refer to the [DSA Signatory Grants Application Guidance Document by CDII](#).

https://www.cdii.ca.gov/wp-content/uploads/2023/07/DSA-Signatory-Grants_Application-Template_Updated-July-2023_FINAL.pdf