



DxF Participant Directory

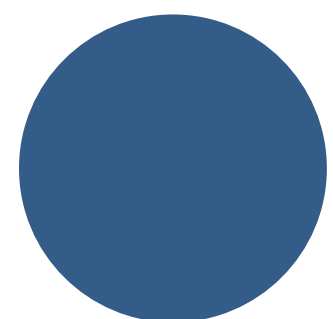
QUICK START GUIDE

Framing

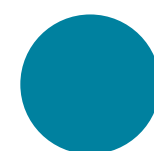
Think of the Participant Directory like an old-school telephone book. If a human cannot find your organization or facility by name lookup, neither they nor the technology they use will know how to exchange with you. If your business name is "CA's Health Care System" but the facilities where you maintain HSSI are called "CA's Best Hospital", "CA's Best SNF", "CA's Best Health Plan Coastal", "CA's Best Health Plan of the Sierras", DxF Participants will not be able to find any "Best" organization to engage in DxF exchange of Health and Social Services Information (HSSI).

The Participant Directory is how an Organization indicates to other DxF Participants which of their facilities intend to exchange HSSI under the DxF.

LEGEND



PRIMARY ORGANIZATION



SUBORDINATE ORGANIZATION



PARTICIPANT DIRECTORY SUBORDINATE ORGANIZATION

DSA Signing Portal and Participant Directory Components

- Primary Organization ("Primary Org")
- Subordinate Organization in DSA ("Sub Org")
- Participant Directory Subordinate Organization, a Subordinate that is not listed on the DSA ("PD Sub")
- Option to elect to delay until January 31, 2026
- Three choices of exchange:
 - Request for Information
 - Information Delivery
 - For hospitals, EDs, QHIOs, SNFs (optional), and Intermediaries that serve these types of Participants, How to Receive Requests for Notification of ADT events

First Steps

1. Log into the [DSA Signing Portal](#)
2. Account Status must say "DSA Document Signed" in order to launch the Participant Directory, see Steps 4 & 5 in Participant Directory [How To Guide](#)
3. Review Organization(s), see Step 6 in [How To Guide](#) to determine which scenario to follow on page 2



See Page 2
for the workflow on different scenarios



DxF Participant Directory

QUICK START GUIDE



If you are eligible for and elect to delay until January 31, 2026, select the 2026 box for any appropriate Primary Organization (**Primary Org**) and/or Subordinate Organization (**Sub Org**); return to the Participant Directory when you are ready to begin exchange.



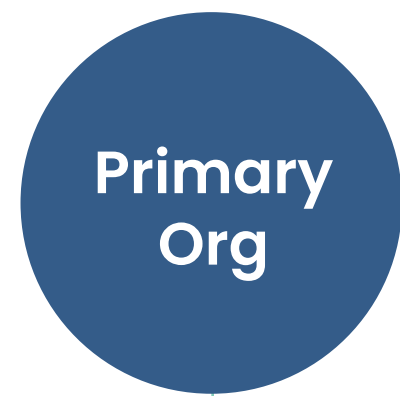
For all scenarios – details on the types of exchange, what your responses mean and more, see the Participant Directory “How To Guide”.



See the Participant Directory “How To Guide” for more details, screen shots, and explanations on what your choices are and how to make them.

Scenario A

DSA has **Primary only**



2024 EXCHANGE

Request For Information

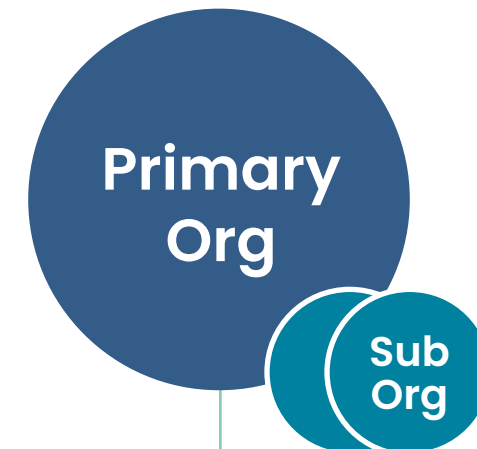
Information Delivery

For hospitals, EDs, QHIOs, SNFs (optional), and Intermediaries that serve these types of Participants, **Request ADT Event Notification**

- **Primary** is not delaying exchange until Jan 31, 2026.
- **Primary** selects methods by which to exchange.

Scenario B

DSA has **Primary and Subs**



Request For Information

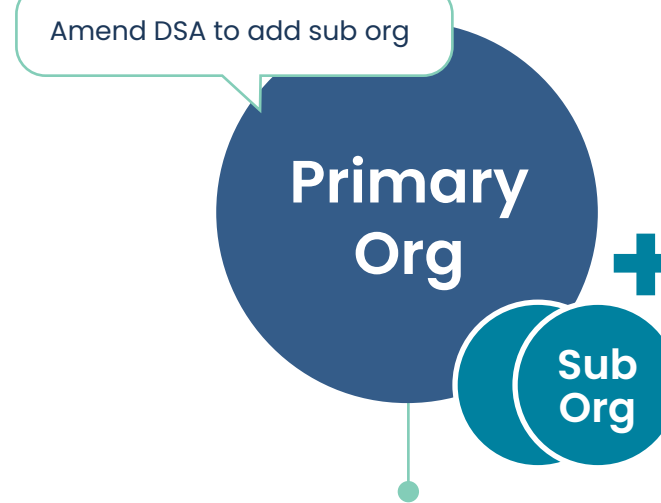
Information Delivery

For hospitals, EDs, QHIOs, SNFs (optional), and Intermediaries that serve these types of Participants, **Request ADT Event Notification**

- **Primary & Sub(s)** may differ in selecting the option to delay exchange until January 31, 2026, if eligible.
 - Some organizations have **Subs** that may delay and some that may not.
- **Primary** selects methods by which to exchange.
 - The **Primary** might select “NOT APPLICABLE” if it intends for only its **Sub(s)** to exchange under the DxF
 - **Primary** selects methods by which Subs exchange.
 - **Choices must be made for Subs** and may mirror the **Primary’s** choices or may differ.
 - An option to copy choices from **Primary** selections is available.
- **Note: For Primary and Sub(s), methods by which to exchange should not be left blank.**
 - Even if exchange for all organizations will happen at the **Primary** level, the method of exchange for **Sub(s)** must be selected.

Scenario C

Signatory **wants to add Subs to DSA** (amend)

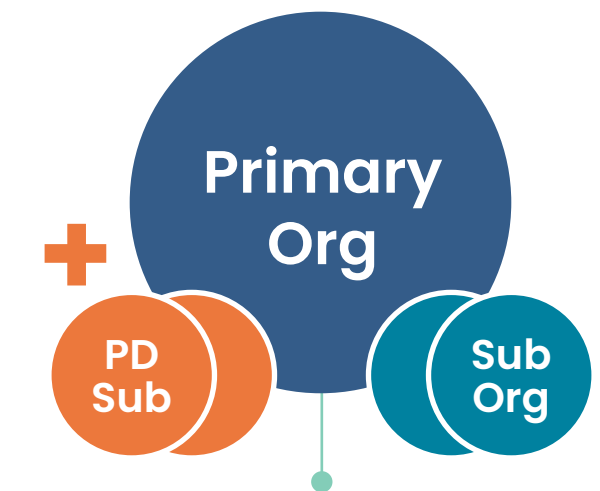


Add Subordinate org(s) to DSA

- Do **not** use the Participant Directory’s “Add Subordinate(s)” button **as that will not add Subs to your DSA.**
- **Primary** adds **Sub** organizations in the DSA Signing Portal.
- If in Participant Directory section of portal, select “Back to My Organizations”.
- See “Help” steps 14 & 15.
- **Primary** sends DSA for signature of amendment, signs and returns.
- **NEXT STEP: Scenario B**

Scenario D

Signatory **does not want to amend DSA but does want to add Subs to Participant Directory**



Add Subordinate org(s) to Participant Directory

- **Primary** only adds **Sub(s)** in the Participant Directory.
- **NEXT STEP: follow Scenario B’s guidance on indicating choices**