



**California Health & Human Services Agency**  
**Data Exchange Framework (DxF) Implementation Advisory Committee (IAC)**  
**Meeting Summary**

*July 17, 2025, 9:00 a.m. to 11:00 a.m.*

**Attendance**

**Presenters:** John Ohanian (CalHHS/CDII), Elizabeth Landsberg (HCAI), Dr. Rim Cothren (Independent Consultant to CDII), Jacob Parkinson (CalHHS/CDII), Cindy Bero (Manatt), Khoua Vang (CalHHS/CDII), Rachelle Grant (Pacific Clinics), Farrah Phillips (Pacific Clinics), Michael Nashed (Central California Alliance for Health)

**Attendees:** Approximately 37 public attendees joined this meeting via Zoom video conference or through call-in functionality. See *Appendices for DxF IAC member attendance*.

**Meeting Notes**

*These notes highlight key points raised by presenters, DxF Advisory Committee members, and public commenters during the meeting. They are not intended to be a comprehensive record of all discussion. For complete meeting materials—including the full video recording, transcript, and public comments—please refer to the link [here](#).*

**Welcome**

Jacob Parkinson, Deputy Director, DxF, CDII, welcomed attendees to the meeting.

**CDII Organizational Update**

John announced that he will transition out of his role as Chief Data Officer of CalHHS and Director of CDII and that the administration and management of the DxF will transfer to HCAI, effective August 1, 2025. Elizabeth Landsberg, Director, HCAI emphasized that meaningful data exchange is essential to achieving affordable, high-quality, and equitable healthcare. She highlighted the strong synergies between the DxF and HCAI's data-driven policy work, including the recent development of the California All-Payer Claims Database. She noted that HCAI's leadership team will remain in listening and learning mode over the coming months to support the DxF's continued success.

**TAC Recommendations on Social Data Exchange**

Dr. Rim Cothren, Independent Consultant, CDII, reviewed recommendations from the Technical Advisory Committee (TAC) focus group on Social Data Exchange and



discussed proposed next steps to advance the Social Services Data Sharing Pillar of the DxF Roadmap.

Member comments included:

- One member asked whether the TAC discussed any specific recommendations for policy guidance on social data exchange, beyond the current “minimum necessary” data-sharing principle, to support the onboarding of social service organizations receiving DxF-related grants.
  - *Response: Rim clarified that the TAC did not provide specific recommendations for guidance. Rim encouraged continued dialogue, highlighted the current efforts (e.g., social services regulatory landscape survey) that aim to address this issue.*

**DxF 2025 Participant Survey**

Cindy Bero, Senior Advisor, Manatt, shared the results of the 2025 DxF Participant Survey. Cindy provided a summary of:

- Survey respondents;
- Use of record systems;
- Frequency of health and social services information exchange;
- Event notification receipt;
- DxF impact; and
- Data exchange challenges.

Member comments included:

- Survey respondents
  - Members acknowledged the solid 27% response rate from counties.
  - One member raised concern about the low response rate from subacute care and skilled nursing facilities (SNFs), at 5%, given that the SNFs are impacted by the draft amendment to the Technical Requirements for Exchange Policy and Procedure (P&P).
- Use of record systems
  - One member suggested highlighting the types of organizations within the 8% percent that do not use an electronic health record (EHR).
  - One member suggested capturing data on usage of specific EHR vendors.
- Frequency of health and social services information exchange
  - Members suggested stratifying data on exchange method (i.e., whether an organization uses an EHR).

- One member noted that these insights could help identify opportunities for training and technical assistance.
  - One member emphasized the importance of collecting and exchanging Z-codes and recommended gathering data on this in future surveys.
- Event notification receipt
  - Members noted the survey did not distinguish between DxF rule-triggered and CMS rule-triggered notifications.
  - One member highlighted that some providers may conflate internal and external notifications.
  - One member suggested stratifying results by the type of organization.
  - One member noted that the reported 60% event notification receipt rate does not reflect the current experience of health plans.
- DxF impact
  - Members suggested incorporating more open-ended questions to understand reasons behind responses.
- Future survey recommendations
  - Members generally support surveying participants annually.
  - Suggested additions include questions on EHR vendors, data availability, data quality, timeliness of data exchange, cost of data exchange, and training needs.

### **DxF Success Stories**

Rachelle Grant, Regional Executive Director, Pacific Clinics, and Farrah Philips, Director of Clinical Administration and Applications, Pacific Clinics, shared their organization's data exchange journey. Rachelle described how partnering with a QHIO and implementing an EHR improved care coordination and access to timely data. Rachelle acknowledged initial challenges, including integrating HIEs into provider workflows and establishing privacy policies.

Michael Nashed Data Integration Program Manager, Central California Alliance for Health (CCAH) shared how the DxF grant program helped CCAH overcome financial and technical barriers to data exchange. Despite initial challenges with provider adoption and technical knowledge gaps, the program strengthened cross-county data exchange and care coordination.

### **Public Comment, Next Steps, and Closing Remarks**

Jacob opened the meeting to public comment. There were no public comments. Jacob reviewed the next steps to close the meeting.



### Appendix 1. DxF IAC Members - Meeting Attendance (July 17, 2025)

Last Name	First Name	Title	Organization	Present
Diaz	Joe	Senior Policy Director	California Association of Health Facilities	Yes
Ford	David	VP, Health Information Technology	California Medical Association	Yes
Goodale	Aaron	VP, Health Information Technology	MedPoint Management	Yes
Helvey	John	Executive Director	California Association of Health Information Exchanges	Yes
Kaiser	Cameron	Deputy Public Health Officer	County of Solano	Yes
Kiefer	Andrew	Vice President, State Government Affairs	Blue Shield of California	Yes
MacDonald	Scott	Chief Medical Information Officer	UC Davis Health	Yes
Miller	Amie	Executive Director	California Mental Health Services Authority	Yes
Saenz	Lucy	Assistant Director of Data Informatics	California Primary Care Association	No
Savage-Sangwan	Kiran	Executive Director	California Pan-Ethnic Health Network	No
Scott	Linette	Deputy Director and Chief Data Officer	California Department of Health Care Services	Yes
Su	Felix	Director, Health Policy	Manifest MedEx	Yes