

Carequality Query Workgroup Meeting

Accelerating seamless, interoperable health information exchange

January 5, 2015
2:00 – 4:00 PM EST



Agenda

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|---|--|-------------|
| 1 | Review Agenda/Identify New Business | 2:00 – 2:05 |
| 2 | Follow-up Items and Action Items from Last Meeting | 2:05 – 2:10 |
| 3 | Definition of Work Tracks | 2:10 – 2:30 |
| 4 | Call for Participation – Review and Finalize Deck | 2:30 – 2:45 |
| 5 | Current Participants for Demonstration | 2:45 – 3:00 |
| 6 | Connectathon Coordination | 3:00 – 3:15 |
| 7 | HIMSS Materials Overview | 3:15 – 3:30 |
| 8 | Work Group Meeting Schedules and Format – 2015 | 3:30 – 3:45 |
| 9 | Next Steps, Other Business | 3:45 – 4:00 |

Action Items from 12/15

1. Refinement of Call for Participation
2. Collect and Review 2014 HIMSS Demonstration Materials
3. Continue Conversations with Confirmed “Virtual Connectathon” Participants
4. Identification of eHealth Exchange participants (Texas, Hans talking with potential eHX participant)
5. Refine Call for Participation and Discuss Timing (Early January)

Differentiating between Virtual Connectathon vs. HIMSS Demo vs. Pilot

- Use the virtual connectathon as a pre-cursor to the pilot. HIMSS is not the limiting factor – if you pass internal testing, can move to pilot sooner
- Managing perception issues – how to get organizations to join beyond the “virtual connectathon” and participate in the pilot?
- Demo scripts and workflow vs. test cases
 - HIMSS demo – patient moving between care setting
 - Can explore what we want to bring into a pilot environment
 - Pilot – use cases oriented where Organization A is querying for a specific set of information from Organization B
 - Will expect pilot participants to cycle and inform the Implementation Guide
 - Moving past simply vendors exchanging IG specs – to an organization/client/prospective client actually using the specs → more close to deployment. HIMSS demo is more of a simulation of that.
 - Pilot Participation Agreement – will be more formalized where the members have signed up to implement a defined use case
 - Can be the network, vendor that supports the network, or the underlying organizations that support the network
- Implementation Guide is the “playbook” for what the interactions look like? What do we need to layout in the timeline and roadmap moving forward. Also helpful for the HIMSS Materials.

Differentiating between Virtual Connectathon vs. HIMSS Demo vs. Pilot (cont.)

- Do we need a participation agreement for the HIMSS Demo?
 - Loose commitment document – but it wouldn't be a rigorous agreement that would need to be “agreed upon”
 - No contractual type arrangement – more of a process that discusses expectations for staffing, days of arrival, etc.
 - CCC example – here are the timeslots the demos are going to be done, here are the organizations, scenarios, etc.
 - Would like for the HIMSS Demo to have a version of the Implementation Guide implemented – might be a draft version or a public comment version – that folks can learn more about – at the HIMSS conference, would fold in additional comments, policy implications – using the IG as a draft strawman to envision what the Carequality Query Pilot will be once it begins.

Discuss: Query WG Work Tracks & Timing

HIMSS Demonstration

- **January:** Registration, Define Demonstration Scenarios, *Coordinate with IG Development*
- **February:** Active connectivity among participants; Rehearse & Refine Demos, *Coordinate feedback and findings with Implementation Guide*
- **March:** *Final Testing for HIMSS15 Demonstrations*

HIMSS Materials

- **January:** Develop plan and strategy for materials
- **February:** Draft materials – *incorporate HIMSS Demo content;* Finalize communications plan
- **March:** Review and finalize materials
- **April:** Publish materials, Initiate communications

Implementation Guide

- **January – Mid February:** Draft content
- **March:** Carequality Comment Period
- **March-April:** *Review Demonstration & Pilot Findings*
- **April 30:** Publish Implementation Guide
- **May-?:** Revise Guide
- <Where are UC developed?>

Pilot

- <Discuss Pilot Timing and Work Track with Work Group>
- Develop pilot scripts
- Likely need a Pilot Materials column/ prep
- Pilot Participation Agreement
- Use Case Documents

“Virtual Connectathon” January – April

Work Stream Feedback

- Use Cases
 - Where does this occur? It is part of the IG as well as pilot.
 - It is also part of the HIMSS Demonstrations (more general)
 - Use Cases to hang the structure upon – at a simpler level – can be ½ a page; when you zoom in – can look at a particular field and see that there are potentially 3 ways to represent that field. Can put that in a different place in the IG or in the Use Case
- Materials for HIMSS Demonstration – harmonized deliverable
- Workplan view vs. single slide view – *action item* to refine

Review Call for Participation

- A few modifications have been made over the last few weeks
- Collect feedback and finalize during today's meeting
- Finalize/lock down presentation with Co-Chairs and Carequality staff on January 6th
- <Capture WG Feedback During Meeting>

Current Participants for “Virtual Connectathon” Participation

- “Are you ready now?”
- “If not, when will you be ready?”
 - Healthway → *Action Item*: change in materials to “eHealth Exchange”
 - Bring this up during the eHealth Exchange Coordinating Committee meeting next week
 - SSA may have some cycles for the Virtual Connectathon, but not the HIMSS Demo - TBD
 - Epic
 - Will be participating, Ready
 - Don’t have HPD support at this time, but have the basic query requirements
 - CCC
 - Kaiser
 - Overlaps w/ CCC, Epic, Healthway, Surescripts
 - (bring non-overlapping participants of 3 above)
 - Surescripts
 - Confirmed participation
 - CommonWell
 - Discovery through XCPD – not currently supported – what are the participation terms – might be ability to be supported in the future
 - Can possibly do **document retrieve using XCA** – moving towards the pilot with a more fully formed IG – CommonWell could demonstrate an intention or a roadmap for the future?
 - There are CommonWell members that do support these other capabilities – can initiate the XCA query once inside the network
 - Would document this as a gap – what would be needed to participate outside the network – provide the information needed to go inside the network to understand what that would look like.
 - Have a development environment that can be used → will be resurrecting some of last year’s documents to provide more information
 - If we can demonstrate the vision using something like XCA – using “Helen Tucker” scenario – use that in the virtual connectathon to map out where the gaps are → helpful for Joe Lamy to develop the IG.
- How to follow-up on the survey feedback to dive into the details of how this works for the respondents? Do we need more than the summary view – how to interact with some of the respondents that didn’t fit into the model. What items in the IG might be a real challenge for these other organizations to connect.

Discuss Connectathon Coordination

- <Capture items discussed during meeting>

HIMSS Materials Overview & Coordination

- Items to Develop
 - <Capture items discussed during meeting>
- Process and work track to develop materials based upon last year's materials

2015 – Verification of WG Availability

- Does our Monday 2-4 pm timeslot continue to work for the group?
- As we focus into “Work Tracks”:
 - 1st Hour: Entire Group – General Implementation Guide Discussions
 - 2nd Hour: Connectivity Participants – “Working Sessions” focused on Testing
- Meeting materials distributed by 12pm PT/3pm ET on Thursdays prior to Monday WG meeting
- → will raise at next call
- Verify John Donnelly, Didi Davis, Tara Dragart – verify the distribution list

Next Steps & Action Items – 01/05 Meeting

#	Item Detail	Item Due/Next Step
1		
2		
3		
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7		

Discussion Items from 12/15 Meeting for Reference

Demonstration & Pilot - Timeline

- Pilot will be directly after the demonstration
 - Testing connectivity virtually
 - Documenting the pilot demonstration findings within the Implementation Guide
 - Goal to have a good number of use cases
- Timing for moving into production systems 1-3 months – want to move into a production pilot
- Is the Pilot a “Technical Pilot”? Inclusive of use cases and trust principles – ensure that multiple networks can be autonomous to what is required within a network.
 - Policy group has developed a listing of 10 principles – that should be mocked up into a real demo that is then brought back to the different organizations so that they can verify that it meets the governance and trust framework. Refine the Implementation Guide based upon this.
 - Use-case specific trust principles (not an agreement) –
 - What type of framework needs to be in place for a live pilot? What do we have to do to get to an operational state?
 - What is the perception at HIMSS → need a timeline that is communicated based upon what is demonstrated

Demonstration & Pilot - Timeline (cont.)

- Demonstration will be within CCC booth at HIMSS (since we are still determining what can be demonstrated), not within Interoperability Showcase (2000 block area for CCC on the show hall – vs. Interoperability Showcase is in the 8000 block)
 - Demonstrate whichever networks are able to come together – that are members of Carequality
- Pilot: Use Cases that we want to demonstrate – treatment, transitions of care/care coordination workflow.
 - Business processes will need to be worked out
- Purpose of Simple Query WG: Define the protocols so that different networks can interoperate
 - Key Deliverable: Simple Query Implementation Guide – document that will be put together based upon real experience – here are the protocols, workflows, operational factors
 - Demonstrations in CCC booth – in a non-production environment – to show what the implementation guide allows you to do

Communications & Messaging

- How to differentiate the messaging – between the Implementation Guide deliverable.
 - Standards within the Carequality demonstration will be the same as standards that are demonstrated within the Interoperability Showcase
 - Acknowledging different purpose of visibility for Carequality
 - “Distributed Demonstration” – in CCC/Healthway/Carequality Booth – demonstrating “ITI-55” – some of the Carequality demonstrations are in the Interoperability Showcase
 - “Booth that is proposed for demonstration is as much of a Carequality booth as it is a CCC booth”
- Will have materials that can be provided and planted within individual booths (e.g., IHC, Commonwell, Surescripts, etc. – have some commonality in materials)
- Implementation Guide: Carequality will own the Simple Query Implementation Guide and it will be hosted on the Carequality Wiki

HIMSS Demonstration Scope

- Will want to cover a minimum set of topics, inclusive of Implementation Guide
- Who is participating in the demonstration – what systems will be connected?
- What Use Cases?
- Where are we going to do it?
- A demonstration that leads up to a pilot → thinking through “IHE Speak” – could go to HIMSS and solicit input via Public Comment – socialize the materials prior to moving into a pilot
 - Example: IHE Connectathon is demonstration of established specifications;
 - Query WG: We are building the Implementation Guide in parallel with the demonstration. We may go into pilots that are not in production to test them – prior to moving them into production
 - Put a Query Roadmap into that messaging – in the real world, here are the things that need to be accommodated – that are in the Implementation Guide.
 - There is industry trust in what we are doing – some organizations may take a step back and wait until the Implementation Guide is “fully baked”
 - “What is the value to organizations to do this?” Need to articulate this to get organizations to the table

Identifying Technical Teams and Infrastructure- Discuss Expectations

- Organizations that will participate –
 - Vendors/Consortiums
 - CCC
 - Epic
 - Surescripts
 - Provider Organizations/Networks
 - Texas state-wide model (will cede to another volunteer) – HIE Texas for statewide exchange as an eHealth Exchange member for network-to-network model (could plug holes in the demo scenario – could be HIE Texas or the vendor
- Healthcare organizations or just vendors?
 - Last year – vendors described what the organization was capable of doing along with a few organizations
 - Epic stood up an environment; CCC stood up an environment; Kaiser didn't bring its own platform
 - Do we need to ask vendors to come with a customer site?
 - Surescripts did a vendor-to-vendor demo – it was okay that they didn't have a healthcare organization there. Timing is challenge.
 - If you pilot this afterwards – want healthcare organizations in 2016 to discuss the value/ their experience
 - Might be confusing to mix organizations and vendors – unless the vendor is the organization; Real world is a mix of HIEs, healthcare organizations, and vendors
 - Timeframe to get legal process completed with health organizations might be challenging
 - Action Item: Might want to bring this to the Advisory Council or Steering Committee to make the call
 - Action Item: Come up with participants, scenarios we are bringing together.

Identifying Technical Teams and Infrastructure- Discuss Expectations (cont.)

- Teams and technical resources that are needed –
 - Call for participation will need both a technical contact and a marketing contact
 - Create a marketing committee to jointly develop messaging, marketing steps, use cases – for unified messaging across organizations
- Infrastructure: Will be up to different organizations to bring their environment forward

Information Exchange Scenarios and Discuss Test Data Strategy

- Previous message orchestration documentation and scenarios – we will review last year's materials
- Patient Discovery, Query, Retrieve, Find Patient Location
 - How will HPD fit in w/XCA/XCPD
 - Have used Provider Directory in the Direct Use Case – the results of that query have to be use in a subsequent transaction. This would be similar – but this binding of HPD response w/ XCA/XCPD is a new ask
 - Will need to have information that can be used – e.g. general information like provider names may not be useful – if some HPD could be setup that has the metadata attributes that can be used with XCA/XCPD
 - Similar to UDI inquiry to obtain endpoint information to know the target electronic address for a set of inquiries
 - These things have not been discussed on the HPD side to accommodate the directory resource – feasibility by April timeframe is unknown

HIMSS Presentations Materials – Booths, Marketing Communications

- Acknowledge that we need to ensure materials provide an introduction of Carequality, Implementation Guide, why the demonstration is new (e.g., network-to-network).
- Logistics – what is being done outside of the CCC/Carequality booth area.
- The overall schedule for the booth is being set – it does have in mind demonstrations that Carequality will be doing as well.
- <http://exhibitionfloor.himss.org/himss2015/Public/eventmap.aspx?mapid=27>



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