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# Carequality Public Informational Call

**August 28, 2025 | 1:00 PM – 2:00 PM ET**

# Agenda

**01**

**Board Update**

**02**

**Update on Delegation of  
Authority Implementation  
and Testing**

**03**

**Administrative Updates**

**04**

**Questions or Comments**



# 01

## Board Update

Seth Selkow

# CMS Health Technology Ecosystem

Press Releases

Jul 30, 2025

## White House, Tech Leaders Commit to Create Patient-Centric Healthcare Ecosystem



### Health Tech Ecosystem Categories

To unlock the full potential of a modern, patient-centered healthcare system, CMS is aligning common infrastructure with private-sector innovation across a set of clearly defined categories.



### Interoperability Framework

Build a national healthcare directory starting with provider and payer information focusing on interoperability.



### Early Adopters

Several companies in different categories have committed to improving health tech.

# 02

## Update on Delegation of Authority Implementation

# Newly Released Blog: Untangling Delegation of Authority

June 24, 2025 | Carequality Blog

## Key Pointers to Implement Carequality's New Policy

The new **Delegation of Authority** policy enhances trust by creating a traceable line of authority between an Implementer or Connection that has the legal right to request information for a given purpose of use, such as treatment, and any other organizations that the Implementer or Connection has authorized to request information on its behalf. The policy replaces the previous “on behalf of” policy to increase transparency.

Read the full blog post at: <https://carequality.org/untangling-delegation-of-authority/>

# Delegation of Authority Testing Timeline

- August 22, 2025: Partner Testing Begins (Originally 8/12)
  - All Implementers with responding endpoints MUST have active representative environment(s) in the Staging Directory that can respond to both non-Delegated and Delegated Requests.
  - Implementers with Delegates MUST have example Delegate(s) in the staging directory that can initiate Delegated Requests to validate connectivity.
- August 26, 2025: Connectathon (Optional) 1-5pm ET
  - Participants are asked to sign up for the event on the connectathon tab
  - Participants must have staff available to troubleshoot any errors that may occur during the day's testing window
    - *Note: Participation in the connectathon does not exempt an Implementer from testing with their group*
- September 26, 2025: Partner Testing Ends (Originally 9/15)
  - Implementers must provide to Carequality evidence that it has successfully completed any testing related to Delegated Requests that is required by Carequality
  - Initiators will report successful non-errored transactions to Admin@carequality.org

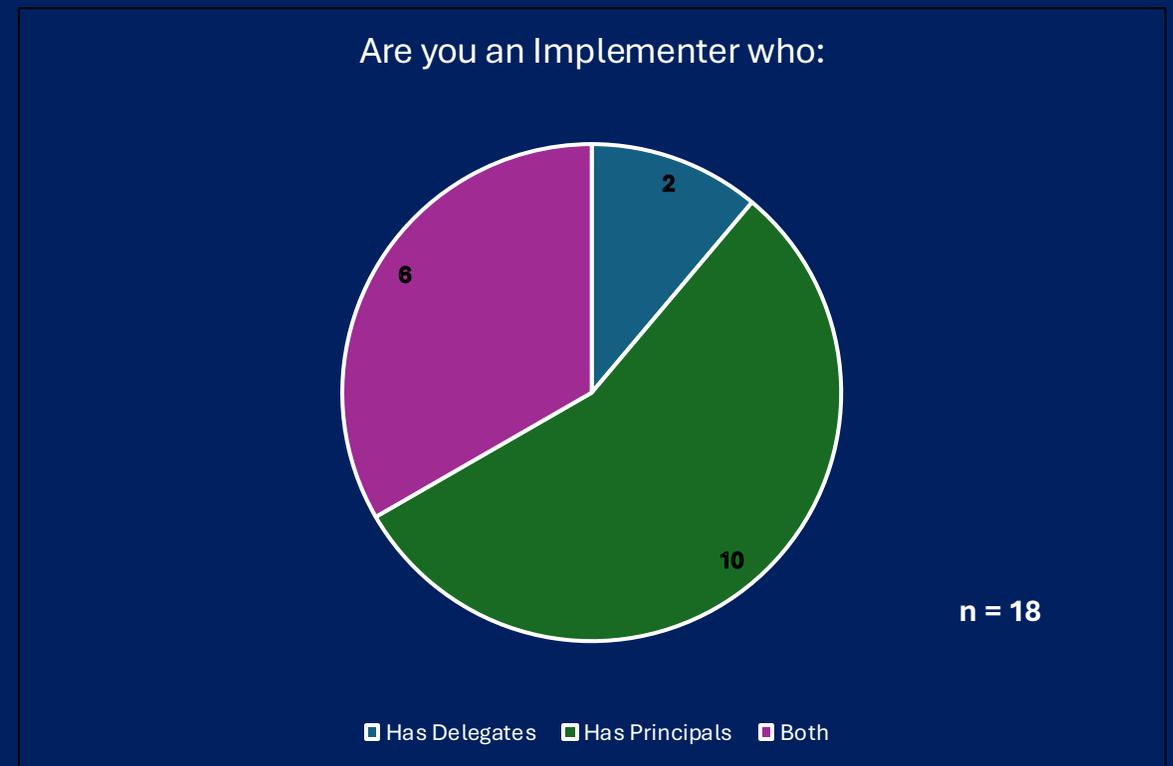
# Delegation of Authority Test Requirements

- Implementers have been organized into groups of 7-8 members
  - Implementers must **minimally** test with their group, but may test with any others they would like
  - Each group has two Implementers that we expect will play the Initiator role
  - Each Initiator and Responder must demonstrate that they can properly receive the new SAML element without error
- Responders MUST:
  1. Load a test patient that can be found via their Stage entry
  2. Post the details of their test patient in the online tracking form
  3. Ensure their Initiator partners submit successful non-errored exchange to [admin@carequality.org](mailto:admin@carequality.org)
  4. Track their progress in the online tracking form
- Initiators MUST:
  1. Load a test patient that can be found via their Stage entry
  2. Post the details of their test patient in the online tracking form
  3. Minimally initiate queries with ALL Members of their group
  4. Submit successful non-errored partner exchanges to [admin@carequality.org](mailto:admin@carequality.org)
  5. Track their progress in online tracking form

# Findings From Delegation of Authority Readiness Survey

*Carequality conducted a readiness survey of implementers to understand progress towards the September 22 2025 implementation deadline and received 18 usable responses*

- Fewer than half of responding implementers reported that all of their delegate connections would have delegation notice determinations by the previous deadline
- Challenges included questions about process and continued need for education
- Both Principals and Delegates had outstanding questions



# Steering Committee Timeline Adjustment

- Implementers are largely on track with technical development and there is broad agreement that the timeline should be extended for when existing Delegates must have approved Delegation Notices to continue querying
- Need to update the Delegation Notice form to include additional elements to assist with identifying all parties (Principal, Delegate, and both Implementers)
- Additional education and support is needed, including help with identifying Delegates and developing a directory to support the Delegation of Authority Notice submission requirements

# Updated Timeline

Milestone	Previous Date	Steering Committee Approved New Date
Effective Date	May 12	<i>Unchanged</i>
Delegate Identification	July 14	<ul style="list-style-type: none"> <li>September 30</li> <li>Anyone who doesn't submit loses write access to the Directory</li> <li>Implementers may submit a written request for an extension to the Steering Committee</li> </ul>
No More Delegated Queries without Delegation Notices	August 22	Feb 1, 2026
Testing Begins	August 22	<i>Unchanged</i>
Testing Ends; Production Begins	September 15	September 26
Technical Production	September 22	October 3

# 03

## Administrative Updates

# Administrative Updates

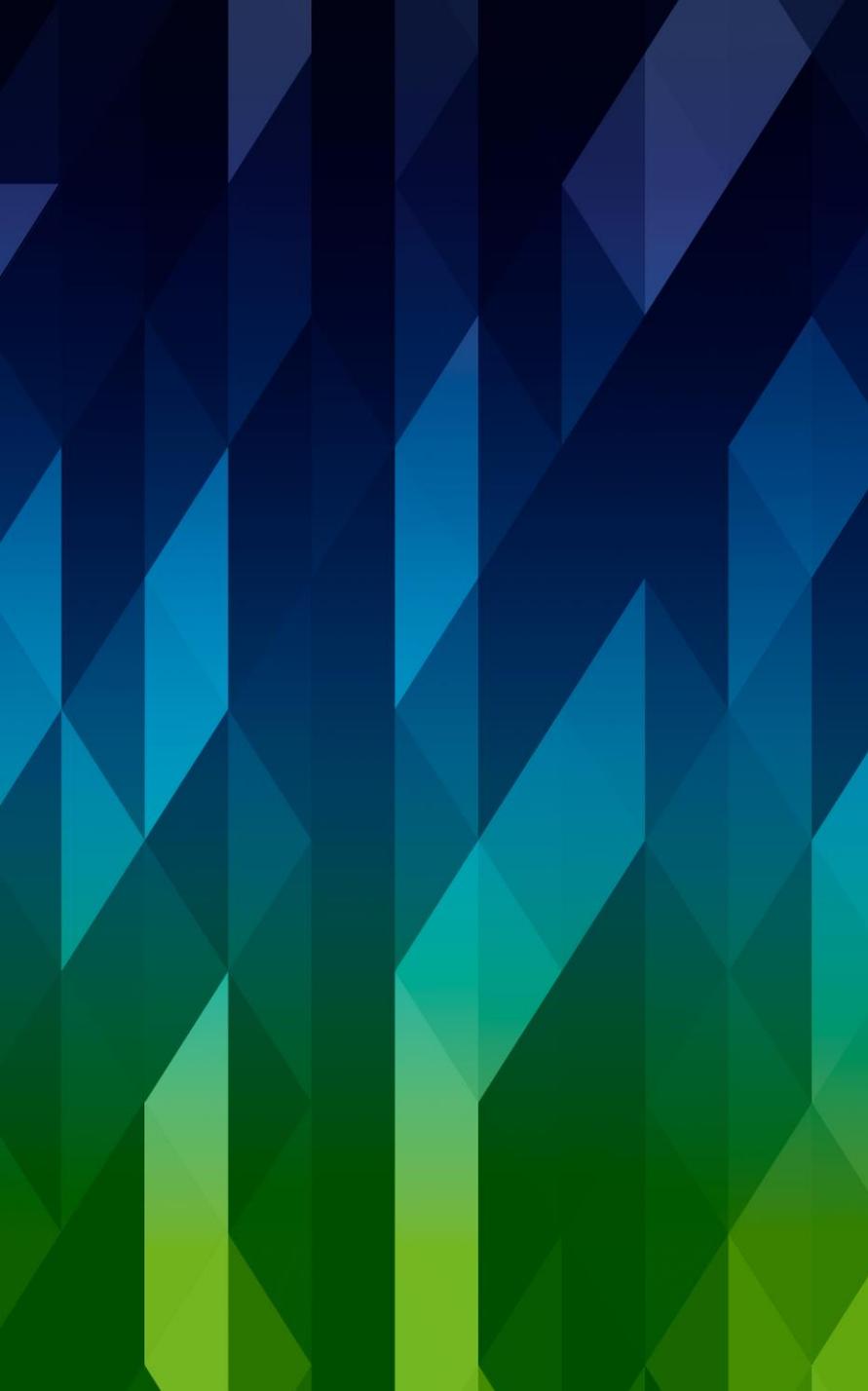
- **Exchange volumes continue to exceed 1.5 billion per month**
- **Governing bodies updating dispute resolution process**
- **Strong focus continues to be on Implementer success**

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Our interoperability framework is **connecting health information networks** throughout the country, changing health data exchange in the U.S

# 04

## Questions or Comments



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**Thank You  
For Attending**