



Carequality Public Informational Call

February 26, 2026 | 1:00 PM – 1:30 PM ET

| 01

Welcome

Agenda

01

Welcome

02

Governing Bodies Updates

03

2025 Year in Review

04

Policy Updates: Dispute Resolution,
Delegation of Authority, Not in
Good Standing Policy

05

Questions or Comments

News & Insights

Safeguarding Trust: Recent and Ongoing Improvements

February 24, 2026 | Carequality Blog

- New Delegation of Authority Policy
- Upgraded Dispute Resolution Process
- Steps Toward TEFCA Alignment
- Looking Ahead – Staying True to our Mission

carequality

Exchange volumes continue to exceed 1.2 billion per month

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



| 02

Governing Bodies Updates

Steering Committee – Overview

- The Steering Committee consists of 18 voting members and is tasked with setting the strategic direction for Carequality and governing the Framework.
- The Steering Committee welcomed 4 new members this year, including:
 - **Ben Rosen** (Netsmart), **Jason Prestinario** (Particle Health), **Keith Cromwell** (Penn Medicine/Central PA Connect HIE), and **Nihit Bajaj** (Epic)
- The Committee elected **Deven McGraw** (Citizen Health) as the new Chair and **Ryan Howells** (CARIN Alliance) as the new Vice Chair.

Steering Committee Membership

Ben Rosen Netsmart	Keith Cromwell Penn Medicine/Central PA Connect HIE	Paul Wilder CommonWell Health Alliance
Brendan Keeler HTD Health	Laura Williams Trinity Health	Ryan Howells CARIN Alliance [Vice-Chair]
Deven McGraw Citizen Health [Chair]	Lucy Johns Healthcare Planning & Policy	Sean Fry Social Security Administration
Hans Buitendijk Oracle Health	Matt Becker Kno2	Shamekka Marty Rep. of Patients & Consumers
Jason Prestinario Particle Health	Nancy Beavin Medica Health Plan	Holly Miller (Advisory Council Co-Chair)
Jeff Coughlin AMA	Nichole Sweeney CRISP	Michael Marchant (Advisory Council Co-Chair)
John Blair III MedAllies	Nihit Bajaj Epic	

Current Steering Committee Priorities

- Carequality is in the process of convening several subcommittees and workgroups consisting of Steering Committee members to:

Develop a Not in Good Standing Policy based on feedback from the Steering Committee.

Select individuals to serve on the Dispute Resolution Committee and Dispute Resolution Committee for Treatment, from among nominees provided by Implementers.

Approve the roster of new Advisory Council members.

Identify ways to enhance trust in the Framework and improve transparency into its governance process.

- The next Steering Committee meeting is March 5.

Advisory Council – Overview

- The Advisory Council is a non-voting governing body with 30 members from a wide variety of stakeholder groups that inform and advise Carequality's work through responsibilities including:
 - Offering feedback on draft policies before their consideration by the Steering Committee.
 - Providing recommendations to the Steering Committee regarding implementation of Framework policies, use cases, etc.
- The application cycle for terms beginning April 2026 closed February 16.
 - We received 24 applications for 14 open seats; new and/or returning members will be selected by the Steering Committee.

Advisory Council Membership

*Terms ending March 2026

Aniruddha Mandale Fresenius Medical Care North America*	JaMor Hairston Next Level Health Innovations	Marty Prah Social Security Administration
Brandon Dupuie Oracle Health	Jean Barmash Particle Health	Michael Marchant Sutter (Co-Chair)*
Chrissa McFarlane Patientory, Inc.	Jim Willis CommonSpirit Health*	Navi Gadhiok eClinicalWorks*
David Mendelson, MD IHE*	Justin McMartin Surescripts	Ray Duncan, MD Cedars-Sinai Health System*
Derek Plansky Health Gorilla	Kirkley Cheney athenahealth	Scott Macdonald UC Davis Health
Evan Currie Blue Cross Blue Shield Association	Kristian Feterik Kaleida Health	Sid Thornton Intermountain Heath
Garrett Rhodes Redox	Larry Garber, MD Reliant Medical Group*	Steve Williams Kno2*
Holly Miller, MD MedAllies (Co-Chair)	Liz Lewis b.well	
Jaffer Traish Findhelp	Marilee Benson Zen Healthcare IT*	

Advisory Council Meetings

- The Advisory Council meets quarterly and last convened on January 21, 2026. Members engaged in a thorough discussion regarding updates to Carequality's draft Not in Good Standing Policy, which was modified in response to Implementer feedback. The policy was subsequently sent to the Steering Committee for consideration.
- The next meeting will take place on April 15.
 - Major discussion items will include updates related to the Not in Good Standing Policy and plans for a Trust Enhancing Workgroup.

| 03

2025 Year in Review

Priority	Quarters 1 & 2				Quarters 3 & 4		Complete
	2025	Jan/Feb	Mar/Apr	May/June	July/Aug	Sept/Oct	Ongoing
							Paused
OBO and Delegation of Authority			Advisory Council Policy Workgroup convened to create the new Delegation of Authority policy- Policy went into effect on May 12	Implementer Testing June-September		Oct 3: Technical production Oct 7: Guidance published Nov 7: Guidance published	SC is working on additional guidance to publish in January
Treatment Definition and Vetting			Advisory Council Policy Workgroup convened to discuss Carequality Treatment definition. The Steering Committee decided to pause discussions until more progress in TECCA is made.				
Directory Review Project			- In 2024, the Board allocated funds to conduct a review of all existing 'Treatment' directory entries - Presentation of findings and lessons learned occurred on 6/5				
Dispute Resolution Process			- Analyzed and drafted dispute resolution findings from the 2024 Dispute Resolution Oversight Committee - Convened small group in July to make amendments to the dispute resolution process - Carequality completed the Change Management process for the updated Dispute Resolution Policy and it went into effect on January 6, 2026				
Not in Good Standing Policy						On request by CQ Steering Committee, Carequality developed and initiated the Change Management process for a proposal to identify Implementers and Connections that are Not in Good Standing	
Communications (e.g., FAQs, Blogs)		Feb 18: Published blog on priorities	April 15: Published blog on right sizing	June 24: Published blog on Delegation of Authority			Nov 13: Published 4 FAQs Nov 17: Published blog on Carequality strategic alignment

| 04

Policy Updates:

- Dispute Resolution
- Delegation of Authority
- Not in Good Standing Policy



Dispute Resolution

Definitions from the Carequality Connected Agreement

- **Dispute:** Any controversy, dispute, or disagreement arising out of or relating to the interpretation or implementation of the Carequality Elements.
- **Dispute Resolution Process:** the non-binding Dispute resolution process established by Carequality and included as Exhibit 2 to the Carequality Connected Agreement (CCA).

Dispute Resolution Process

The dispute resolution process is a document that outlines the steps involved in addressing any formal disputes that may arise between implementers, or between implementers and Carequality.

- In January 2026, we implemented enhancements to our [Dispute Resolution Process](#) to make it faster, clearer, and more transparent. Key updates include:
 - Streamlined timelines and a defined “Dispute Resolution Calendar” to ensure predictability for all participants.
 - Specialized panels with external experts, such as HIPAA privacy specialists, for complex issues, such as disputes related to the Treatment Permitted Purpose.
 - Plain-language summaries of findings for greater transparency.
- These updates ensure that disputes are resolved efficiently and fairly, allowing the community to focus on delivering patient-centered care.

Recent Updates

- ✓ Carequality collected nominations from Implementers for individuals to serve on the Dispute committees, per the Dispute Resolution Policy:
 1. The Dispute Resolution Committee (DRC) for Treatment; and
 2. The Dispute Resolution Committee (DRC).
- ✓ The Carequality team received 20 complete nominations for the DRC and 22 nominations for the DRCT and convened a subcommittee of Steering Committee members to approve the roster.
- ✓ The Steering Committee will now select individuals to serve on each committee.



Delegation of Authority

Delegation of Authority

October 3, 2025

Technical
Production

October 7, 2025

Guidance: DOA
“Pointers” sent to
Implementers

**November 7,
2025**

Guidance:
Delegation Notice
Process sent to
Implementers

February 1, 2026

No More
Delegated
Queries without
approved Notices

Delegation of Authority Rollout

- As of February 1, 2026, Delegation of Authority is in full effect!
 - No More Delegated Queries without approved Delegation Notices
- Thank you to all of the Implementers and Carequality Connections that have been involved in every phase of rollout.

Guidance: Delegation Roles

- Carequality staff are working on guidance to help Implementers and Carequality Connections identify their roles in the Delegation process.
- The guidance will include a flow chart analysis and definitions
- Carequality staff have been socializing the guidance with Implementers and Steering Committee Members
- Carequality Staff requested steering committee volunteers to serve on a subgroup to finalize the draft guidance.
 - The subgroup last met February on 27 and is working on a proposal to present to the Steering Committee in April



Not in Good Standing Policy

Not In Good Standing Policy Section 3.8

- **Amendment:** We are proposing to add a new Section 3.8 to the current Carequality Framework Policies Document.
- **Purpose:** This policy was created in response to requests from Implementers to have more transparency into which Implementers and Connections have been suspended or terminated or are not in compliance with the terms of the Framework.
- Staff presented original concepts in December and modified based on feedback from the Steering Committee.
 - The Carequality team is currently reviewing feedback with the Steering Committee.

| 05

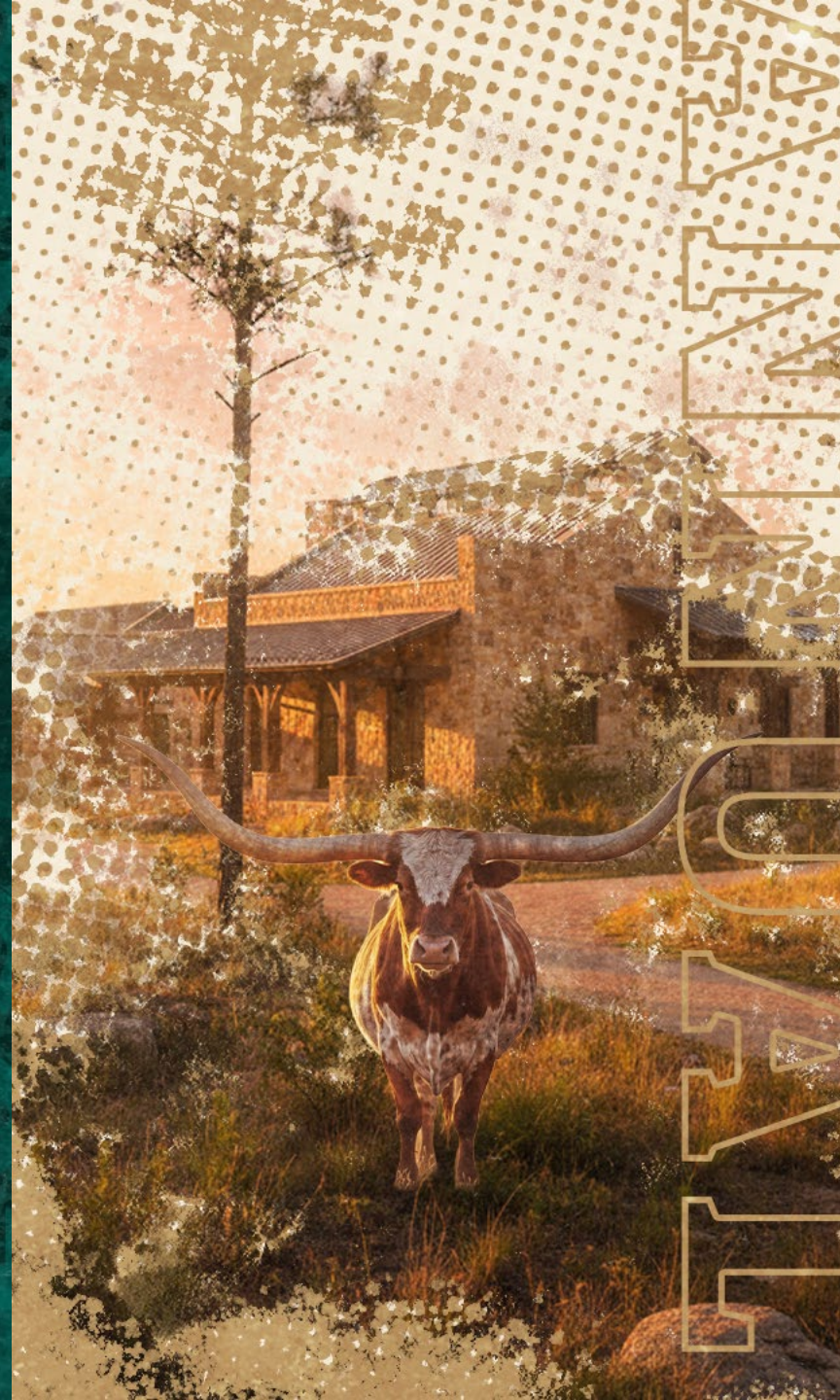
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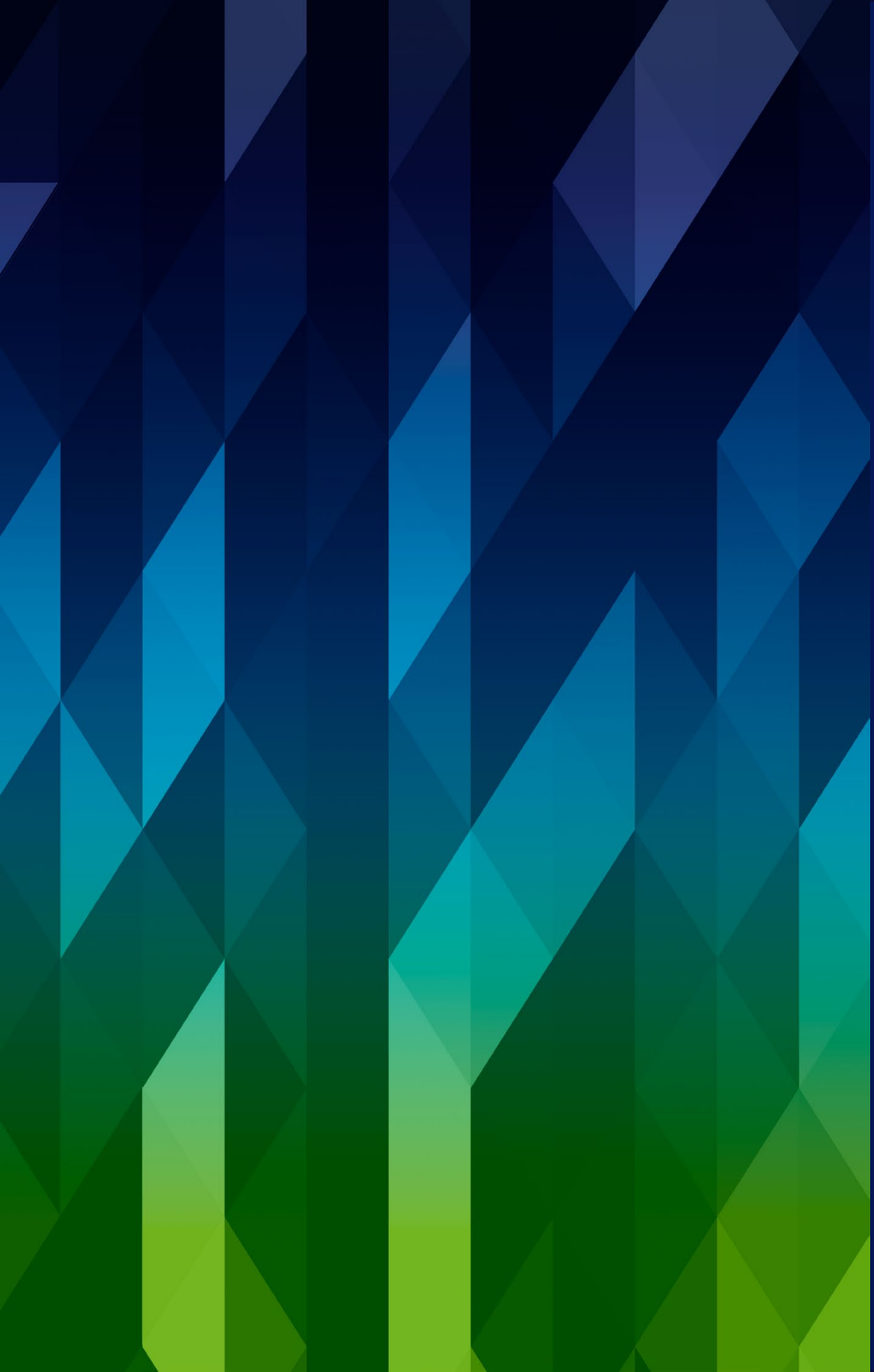
the
sequoia[®]
project



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Registration
Now Open!





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**Thank You
For Attending**