DxF Participant Directory User Guide

JAN 2025

EXCHANGE WITH PARTICIPANTS

CDII is providing this resource to assist DxF Participants with using the Participant Directory for exchange of Health and Social Services Information (HSSI) with other Participants, which outlines the following information:

→ Selected Participant exchange scenarios

→ Visual of how Intermediaries and organizations use the Participant Directory to get connected for exchange

Participant Exchange Scenarios

→ Requesting Information from a Participant via your QHIO or other Intermediary

→ Requesting Information from a Participant using point-to-point connections to your own technology

→ Requesting Notifications of ADT Events from a Participant via your QHIO or other Intermediary

→ Information Delivery from a Participant via your QHIO or other Intermediary

Should Participants have additional questions not addressed in this resource, please email the Center for Data Insights and Innovation at dxf@chhs.ca.gov

DATA EXCHANGE FRAMEWORK

How do you or your Intermediary use the Participant Directory to exchange information?

→ This document serves as a guide to help Participants navigate the steps for exchanging information.

→ Several of the most common scenarios on how to exchange information with other Participants are outlined in this guide.

→ Find the scenario that best fits your situation and follow the steps to begin exchanging information.

Note: Capitalized terms in this document have the meaning as defined in the *Glossary of Defined Terms*

◆ DATA EXCHANGE FRAMEWORK

Where can I find the list of Participants to exchange with?

→ A listing of all Participants and the information you need to exchange with them is published on the DxF website.

→ CDII publishes two versions: the 'DSA Signatory List' is human-readable and the 'Participant Directory Listing' is in a machine-readable format.

→ CDII publishes the two listings weekly, refreshed with new Participants and information on how to exchange with them.

DATA EXCHANGE FRAMEWORK

Requesting Information from a Participant via your Intermediary

1 Send a Request

Your organization sends a **request for information** to your Intermediary, which might be a QHIO, specific to an Individual or a set of Individuals.

2 Participant Lookup

Your Intermediary's technology system looks up the Participant you wish to request information from using the Participant Directory Listing, refreshed on the CDII DxF Webpage.

3 Request for Information

Your Intermediary's technology system forwards the request for information to the Participant using the method indicated in the Participant Directory.

4 Information Retrieval

The requested information is delivered to your Intermediary via the method indicated in the Participant Directory (e.g., connectivity between your Intermediary and the Participant's technology).

5 Receive the Information

Your Intermediary delivers the requested information to you. This might be through your system interface with your Intermediary, or via your Intermediary's portal, for example.

QHIOs and other Intermediaries know how to exchange with each other and with nationwide networks!

DATA EXCHANGE FRAMEWORK

Requesting Information from a Participant via point-to-point, or "SELF", connections to your own technology

1 Build the Interface
Build an interface between your technology and the Participant you are requesting information from.
Note: interfaces will need to be built to each Participant your organization exchanges with.

2 Send Request for Information
Request information from the Participant specific to an Individual or set of Individuals via the point-to-point connection.

3 Receive the Information
The requested information is delivered to your organization via the point-to-point connection.

Note: If your organization uses point-to-point connections to your own technology for exchange, this requires a one-time interface be built between your organization and every Participant you are requesting information from and every organization that wishes to request information from you.

Point-to-Point is indicated in the Participant Directory fields when a Participant has selected "SELF" as its choice of how to exchange.

DATA EXCHANGE FRAMEWORK

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Requesting Notifications of ADT Events from a Participant via your Intermediary

1 Send a Request

Your organization sends a standing request for **notifications of admissions & discharges** to your Intermediary specific to a set of Individuals as listed on a roster.

2 Participant Lookup

Your Intermediary's technology system looks up the Participant (hospital, emergency room, skilled nursing facility) you wish to request notifications of admissions and discharges from using the Participant Directory Listing, refreshed on the CDII DxF Webpage.

3 Request for Notifications

Your Intermediary's technology system forwards the request for notifications of admissions and discharges to the Participant using the method indicated in the Participant Directory.

4 ADT Event Delivery

Notifications of admissions or discharge are delivered to your Intermediary

5 Receive Notifications of Admission or Discharge

Your Intermediary delivers notifications of admissions and discharges to you. This might be through your system interface with your Intermediary, Intermediary's portal, or Direct Secure Messaging, for example.

QHIOs and other Intermediaries know how to exchange with each other and with nationwide networks!

DATA EXCHANGE FRAMEWORK

Information Delivery from a Participant via your Intermediary

1 Order or Referral

An Order or Referral has been initiated by you (e.g., for a diagnostic test or evaluation) via any method, which may include processes outside of the DxF.

2 Participant Lookup

The requested provider has completed the Order or Referral and because your organization is the ordering provider, their technology system looks you up using the Participant Directory Listing, refreshed on the CDII DxF Webpage.

3 Information Sent

The requested provider's technology system delivers the results of the Order or Referral to your Intermediary via the method indicated in the Participant Directory (e.g., connectivity between your Intermediary and the Participant's technology).

4 Information Delivery

Your Intermediary delivers the results of the Order or Referral to you. This might be through your system interface with your Intermediary, or via your Intermediary's portal, for example.

QHIOs and other Intermediaries know how to exchange with each other and with nationwide networks!

DATA EXCHANGE FRAMEWORK