



**California Health & Human Services Agency
Data Exchange Framework Technical Advisory Committee (TAC) Meeting
Transcript (12:00 PM – 1:00 PM PT, November 20, 2025)**

The following text is a transcript of the November 20, 2025, meeting of the California Health and Human Services Agency Data Exchange Framework TAC. The transcript was produced using Zoom's transcription feature. It should be reviewed concurrently with the recording – which may be found on the [CalHHS Data Exchange Framework webpage](#) to ensure accuracy.

12:02:11 We will give a moment for everyone. To jump into the webinar space.

12:02:40 All right.

12:02:44 Akira, if you want to hold for just a minute, there were quite a few people over in backstage.

12:02:50 Holding there that may need to be brought in.

12:02:49 Okay.

12:02:59 It looks like most people have moved over now. Thank you, Akira.

12:03:02 Okay. Thank you, Rem. Well, let's get started. Hello and welcome. My name is Akira, and I'll be in the background supporting with the meeting management.

12:03:10 I'd like to take a moment to go over some housekeeping, provide some meeting.

12:03:14 reminders of meeting norms. We'd like IAC members joining virtually, or... My apologies. Tag member is joining virtually, so keep their camera on for duration of the meeting.

12:03:26 To foster increased interaction and discussion. You may have noticed that we switched our meeting platform.

12:03:33 Uh, from Teams to Zoom. Most functionality will be the same.

12:03:39 Um...

12:03:42 My apologies. Live closed caption will be, uh, available. Attendees can turn on captions by.

12:03:48 Uh, clicking the CC button, um...

12:03:56 Give me a second here, Rim. I'm running into some technical issues.

12:04:01 Uh, Catalina, could you take over for me for a second?

12:04:08 Sure.

12:04:12 I just entered, so I'm not sure where we left off, but I will... Um, start from the beginning.

12:04:18 Oh.

12:04:20 That'd be good at Catalina, who was just going.



12:04:21 Okay. Okay.

12:04:21 Yes, thanks, Catalina.

12:04:33 Hello and welcome. My name is Catalina, and I'll be in the background to support with Zoom. If you experience technical difficulties, please type your question into the Q&A.

12:04:42 Live closed captioning will be available. Please click on the CC button to enable or disable.

12:04:47 And with that, I'd like to introduce Rim Cothren.

12:04:52 Well, thank you, everyone, for joining us for this, which is our last meeting in the series on identity management.

12:05:01 Thank you all for joining us today. Let's go on to the next slide, please.

12:05:07 We always start off with a vision for data exchange in California. I'm not going to read this slide to you. I think you've all seen it before, but just want to acknowledge that.

12:05:17 If we are going to be effective in moving data around and supporting, um.

12:05:23 Whole person care, we need to have an understanding of who it is that we're talking about, and that's why we're here today.

12:05:28 is to help us down that path. Let's go on to the next slide, please.

12:05:33 Just real quick, on our agenda for today. Um, we've been talking about the identity management problem statement.

12:05:41 And we're going to use that as kind of our surrogate for what we heard last time, because we spent quite a.

12:05:46 wordsmithing that. I want to make sure that we get it correct.

12:05:49 And that'll be one of our outcomes of the meeting series.

12:05:53 And then we're going to turn once again to some of the characteristics and components of a solution. We've adjusted that a little bit from last time.

12:06:00 Just to be really clear, our goal there, though, is not to come up with a detailed solution for identity management, but to understand enough about.

12:06:12 the problems to... to... ensure that we're addressing the problems in the right functional way. And so, we're not driving down to a final solution there.

12:06:22 We will pause for public comment about 10 minutes before the hour.

12:06:25 Uh, and then we'll talk a little bit about next steps and any closing remarks we have.

12:06:30 We can go on to the next slide, please.

12:06:33 We're not gonna call Roll today, but this is a reminder of who's on the call with us.

12:06:38 Thanks once again for everybody for their time, for joining us today.



12:06:43 gone to the next slide as, um, Akira and Catalina both mentioned, we are back on Zoom.

12:06:50 Uh, that means that, uh, in addition to the public comment that we'll be taking verbally.

12:06:55 At about 10 minutes before the top of the hour, you can also use Zoom's Q&A feature to ask questions or make any comments during the meeting, anything that you do put in the Q&A.

12:07:06 is visible to everyone. Um, that includes other members of the public, so you can use that. Uh, the public can use that for comments.

12:07:14 I would invite the panelists to take a look sometimes at what's in the Q&A.

12:07:20 There are often some interesting questions or points that are made there that you might want to surface for other panelists.

12:07:25 I often try to keep an eye on that, but I do want to keep people focused on our internal conversation as well.

12:07:33 It's go on to the next slide, please. And just as a reminder, our real objective of this meeting series is to identify, characterize, and prioritize the issues in statewide identity management.

12:07:46 And as I said, we're going to talk a little bit about.

12:07:48 What might be the characteristics and components of a solution?

12:07:52 But it's really characterizing the issues and how to potentially address those issues.

12:07:57 is where our focus is. We are not going to end today's meeting with a full-blown technical architecture for identity management statewide. That is not the intent.

12:08:07 Go on to the next slide, please, and I'm going to pause here at this one. This is our take.

12:08:14 On the adjustments you asked us to make in our problem statement, that we are really.

12:08:20 Uh, that identifying individuals across healthcare, social service, and public health system is unreliable and inaccurate.

12:08:27 And that comes from a couple of large issues.

12:08:31 And it leads to impacts to individuals and services.

12:08:37 Um... And then there's a kind of final statement here at the bottom that we heard is that these problems lead.

12:08:46 to, um... Uh, that these problems lead to a need to create trusted, efficient workflow for person matching. And so, it's... Trusted and efficient is where we need to be headed, and understanding that this is a workflow and not just a technical.

12:09:01 issue. Okay, Ted, I'm gonna pause here. Are there things that you think that are still not correct in how we're characterizing the problem here?

12:09:19 Julie, thank you for that. I always feel like you give us a pretty high bar.



12:09:15 so much better! Really good job!

12:09:23 Um...

12:09:23 Yeah, you met my high bar! Seriously, like, uh, I do feel like it captures our conversation last time. What I really like about it is very succinct, it's very clear.

12:09:34 Um, what the... basically, it identifies the problem so that you can.

12:09:42 um, really think strategically about the solutions, like, both from the individual impact and the service impact, but I also really like... that the service impact does.

12:09:53 consider the individual. As well, so I really appreciate that, the piece about opportunities to collaborate and coordinate care.

12:10:00 Um, because that does have an individual impact, but it happens at the system level, so I really appreciate that.

12:10:07 Thank you, Julie. Any other thoughts? Any corrections anybody would want to suggest?

12:10:25 So either we got this perfect, or you guys aren't in the mood to talk today, and I hope it is not that you guys aren't in the mood to talk.

12:10:33 I'll... I'll just add on to say that I think this accurately.

12:10:38 covers, uh, what we talked about, and... How we'd like to see this, um, this handled.

12:10:46 Thank you, Aaron. Well, I think that that reflects that you guys have been pretty good and pretty explicit about what the issues are, and.

12:10:54 It's one of the things that we really want to try to understand here. You know, people have been saying for a long time, we need to figure out identity management. Well, that doesn't help us very much in understanding what to do.

12:11:05 Without understanding, so what are the issues, and why do we want to solve those particular issues for the.

12:11:12 Comes that we should be looking at if we're doing that successfully, and so that's what we've been trying to capture here.

12:11:21 Remember.

12:11:19 I saw a hand pop up, yes, Julie.

12:11:22 I also think it's really important. Um, how you res... how you state the problem, make sure the solution is solving the problem that you need to solve, right? And so, not having this... As the last time, being a little bit more ambiguous and a lot of words, and not as much focus.

12:11:42 Um, the solution might not have actually solved what we needed to solve, so I think this makes it really clear.

12:11:48 Uh, and it gives... it sets us up for more success by making sure that.



12:11:53 Um, the problem is so clear that the solutions, like, you have to solve it.

12:11:57 you know, identity management without thinking about coordinated care is not helpful, right? Um, identity management that doesn't look at the impacts of people actually losing services for failure to do it well.

12:12:10 would not be a good identity management system. So, being so, so clear, make sure that the solution.

12:12:16 is the solution we need.

12:12:19 Thank you, Julie. So, I'm going to use that as kind of a segue into the next slide. So, if you look here at this one.

12:12:25 Uh, what we captured here is that the inaccuracy and unreliability is due to two things.

12:12:32 The lack of easy access to, uh, authoritative identity.

12:12:38 And incentives to create and propagate unmanaged... unmatched identities.

12:12:42 So if we move on to the next slide, please... That's how we wanted to think about the solution then, so... If those are our two problems.

12:12:53 Then we solve those problems by providing easy access to authoritative sources.

12:12:59 And by making it easy to provide some form of feedback when we believe that unmatched identities are potentially duplicates have been created so they can be resolved and aren't.

12:13:10 Passed around without resolution. So that's the way we kind of thought about this.

12:13:15 Um, I want to talk just real briefly about some of the implications of this.

12:13:20 And then, um, we'll probably move from this slide, hopefully people have it around.

12:13:26 To the picture, and open things up for a lot more discussion.

12:13:30 If we think about that first component, the real goal there is to facilitate better.

12:13:35 better resolution of identity by, um... When, uh, participants are interacting with each other, so we're not trying to solve a problem within.

12:13:44 your system, but solve problems between. you interacting with another system where you need a shared.

12:13:51 common identity, and that's the way we've thought about this, and the reproach to that is facilitate access to.

12:13:59 Multiple authoritative sources. Hopefully spanning as many population segments as possible, and you've identified some of the.

12:14:06 Um, some of those segments for us, but also some of the authoritative sources that we might not have considered.



12:14:12 For instance, statewide databases of student information that we don't normally think about.

12:14:19 And that that might be... accomplished through a couple of different ways. I think it was Lloyd that identified last time.

12:14:28 that some of the things we've been thinking about sound like now DXF is going to create another authoritative source.

12:14:34 And so that might be something that we actually say, yes.

12:14:38 And we're going to do that. And that we have a source that is a database of a bunch of cross-references. So, for instance.

12:14:46 If I have... Rem Kothren's member ID from his health plan.

12:14:52 I can identify his MRN or some other identifier in health system, because that all resides within that database.

12:15:01 Alternatively, we might merely facilitate access. So, if I can search the health plan and find RIMS, uh, member ID.

12:15:10 that now I have better data to go search the health system.

12:15:14 for Rem Kothrin, but that that data isn't held within a state system. Now, I don't want to get down into the weeds, but just.

12:15:21 to illustrate that there are different ways that you might accomplish that.

12:15:26 facilitate resolution. And then the second component here is, okay, so I didn't find... RIM in the health system.

12:15:34 And I created an identity in my system that's unlinked to the health system.

12:15:39 What do I do with that? Well, should I tell the health system, hey.

12:15:43 I am certain. that you know about REM surgery, because he had it there last year, but you claim to not know who Rem Cotheran is, so.

12:15:53 please check. Uh, merely to make, uh, organizations known, uh, aware of failures.

12:16:00 And provide some opportunities for improvement, but especially. If I'm now going to send some information into the health system.

12:16:08 And I know that I failed to resolve an identity, well, is there something I should do to flag this? Is, I think I'm pushing a duplicate version of Rim Conthern into your system, because I think you already know who Rem Kotharan is.

12:16:21 But I couldn't find that identity when I searched for it.

12:16:25 So those are the two kind of things that we're thinking about might happen there.

12:16:30 So let's go on to the next slide, and this is kind of a picture to illustrate.



12:16:34 What we're talking about, that on the right-hand side, there are a bunch of existing authoritative sources, that there is some way for you to find identities through.

12:16:43 Uh, facilitating searches of the authoritative sources. And then, if that works, great, and now you have better identity resolution.

12:16:51 But when it doesn't, that you need to be reporting those suspected duplicates, and only when you expect that things failed.

12:16:59 That you might, um, you might report them on. And just to give you a differentiation there.

12:17:06 Well, if Rim just moved to California, I don't expect to find him in any of these systems, so when I created a new identity, I don't expect him to be found, and so I don't need to report that.

12:17:15 But if I really believe that RIM should be in the health system because he had surgery last week.

12:17:20 then I suspect that I created something new. Let me pause there, and I want to reflect back to what Julie said before we went here, is that if we understand what the problem is, then that should tell us how to solve it.

12:17:33 Are we talking about the right to features or components.

12:17:38 in this. One where we facilitate search, and the other where we report suspected duplicates.

12:17:46 Or do we have this wrong, and this is not how we should address the situation?

12:17:57 So, Aaron, yes, thank you.

12:18:03 Hi, so... when I think about, um... Julie's comments and your comments about, you know, do we have.

12:18:10 The correct problem identified, and that is the solution going to solve that?

12:18:15 I go back to our original discussions on the DXF, is like, I don't understand how entities can.

12:18:22 achieve the goal of real-time, near-real-time data exchange. Unless we have authoritative identity management.

12:18:33 If we... if we don't have that, right, we have the search capability here, which is... would be beneficial and helpful.

12:18:41 You introduce a step in here where somebody has to make a decision, and the real-time aspect of DXF goes away at that point.

12:18:48 I... or it becomes very hard to achieve. So, I think from that perspective.

12:18:55 of solving that problem, having the authoritative portion is... is... required, and I would love to hear other thoughts about that.

12:19:08 Um, especially from the Qios, because they have to do this today.

12:19:12 Um, and they're really a big part of the real-time data exchange.



12:19:18 How do they feel about having an authoritative? Identity management... That will reduce their load of having to... do so much work themselves at this point.

12:19:30 Thank you for that, Aaron, and so I want to make sure that I understand what you're saying is that there is, at least in some cases, an issue if that orange box, the search facilitation.

12:19:40 involves a human being making... non-real-time decisions, as opposed to there is something that a system can do... can access in real time without a human intervention.

12:19:53 Am I hearing that right?

12:19:55 Yes, yes, that for the real-time component. the authoritative portion is needed so that the automation can.

12:20:04 With a certain confidence level, make the connection itself.

12:20:07 Okay, thank you, Aaron. Jeff, I saw your hand go up for a while, and then come back down. Did you have a comment you wanted to make?

12:20:14 Uh, yeah, sure, sure, I was gonna wait for others to comment, but, um... I think, you know, the goal stated on Slide 8, right, is to facilitate resolution of identity.

12:20:27 So, um... You know, in order to do that, really, um, the DXF would need to be an authoritative, central identity layer.

12:20:38 Um, like an EMPI or MDM solution, really, to have the best possible single source of truth.

12:20:45 That has a unified profile, right, of that identity.

12:20:55 single authorized, um, database designed for identity lookups, right?

12:21:01 Um, a search facility. Um, doesn't really reach the goal of facilitating identity resolution.

12:21:09 Um, that would require DXF to build a middleware layer.

12:21:14 Really, that sits in front of all these existing authoritative sources over here.

12:21:19 Um, when a request comes in in the search facility, it would have to be.

12:21:25 Um, you know, sequentially or even concurrently needed to query on all of those authoritative sources until it finds a match.

12:21:33 Or comes back with a null answer. This is really the approach of.

12:21:40 Uh, you know, because. In this approach, each authoritative source would have its own matching approach to determine if the incoming request.

12:21:51 meets their internal match threshold, and this can lead to very inconsistent results.

12:21:56 And it's really the approach of the current national exchanges, right, which operate.

12:22:02 Around 50%. Um, so... Those were my thoughts around that, and I can go on a little bit more, but the problem there is performance, latency.



12:22:14 There's no single source of truth, so identities remain fragmented.

12:22:20 Um, and then you'll still have the duplicate and conflicting identity problem.

12:22:24 Thank you, Jeff. Uh, Lloyd, I see your hand up, but give me just a second. I want to, um... address, uh, an item that Julie dropped in chat.

12:22:36 What do we mean by authority of identity sources? And I want to tell you what.

12:22:40 I mean, when I say that. But I'm more interested in what you guys meant when you said authoritative identity before.

12:22:49 What I meant by that is that I'm going to use an example here, is that the DMV or Medi-Cal.

12:22:56 Are both authoritative. The DMV can tell you what the driver's license number is, because they issue it.

12:23:02 Not because they heard it from somebody. or Medi-Cal is authoritative for a sin because they assign sin numbers, not because somebody told them.

12:23:12 Whereas a QHIO is not authoritative for either of those, because it doesn't issue those numbers, but it may know about those numbers.

12:23:22 from what it hears. And so that's what. I mean by authoritative sources.

12:23:28 But, again, we took that... term from you guys.

12:23:33 And so you may have meant it differently than that.

12:23:36 Sorry about that, Lloyd. You had a comment.

12:23:40 Uh, I did, but I appreciate what you just said. So, first of all, I appreciate the.

12:23:46 the way you have broken this up, the facilitate access to authoritative sources.

12:23:51 I think that's very important, because. then we don't have to actually say that there needs to be a DXF1. There just needs to be one that... we use. The search part.

12:24:05 perhaps the word search is... is the problem, because.

12:24:11 Anytime we access an authoritative. source to try and find out what the actual.

12:24:17 Identity is... well, not any time, but almost any time that we access it.

12:24:22 We go in with information other than the identifier, right? Um, if we already know the authoritative identifier, the driver's license number, or the SIN, or the social security number, or whatever the authority issued.

12:24:34 If we already know that number, we don't need to go back to the authority, we just use that number.

12:24:39 Typically, though, we have some other pieces of information, the name and address, a date of birth.



12:24:44 And we asked them, what is your authoritative number for this information? So, if we want to call that search, that's fine, or something else, look up.

12:24:54 But there's... part... that's part of the facilitating access, is that you can take the information you have and convert it into an authoritative number.

12:25:04 Then the part that I particularly like is the second part, which is capturing the idea that.

12:25:10 Here is my confidence in that number. up to and including... I'm certain that this is not the right number, and I'm probably creating a duplicate.

12:25:19 all the way to, we're really sure that this is.

12:25:24 The... the actual... A person who's associated with this.

12:25:29 authoritative number, or identifier of some sort. That becomes very, very important when we talk about getting people access into the system. If we require that everybody meet the 97 percentile max.

12:25:43 Before you can access the system, that introduces all kinds of access problems.

12:25:48 Which we... when we're operating the system, we... we need to relieve that burden from the person trying to gain access and say, we'll take that on later.

12:25:58 And that's where the suspected duplicate or low volume match or low propensity match, that kind of stuff.

12:26:06 Becomes very important. So I appreciate the way you've broken these things up.

12:26:11 We might wordsmith a little bit to convey so that everybody agrees that, yes, that's the idea, but I... Personally, I think this is very close to the two problems that we have.

12:26:24 Maybe we can express them better. Thanks.

12:26:27 Thank you, Lloyd. Erin.

12:26:31 Just a quick question. Is the existing. authoritative sources, only other state agencies? Was that the intention?

12:26:40 Not necessarily, uh, what, at least in my mind, but I would actually ask you, but in my mind, it's.

12:26:47 Anybody that is authoritative for some identifier that might be used. So that means that a commercial.

12:26:55 Um, health plan. That issues... Member IDs might be authoritative for it.

12:27:01 Member ID. Sure, okay.

12:27:03 Um, and that a health system. is authoritative for their MRN.

12:27:11 Because they issue it.



12:27:11 So they've done some... yeah, and so they've done some level of verification of that person's identity and created the identity, and that makes it.

12:27:19 Well, they at least have an identifier internally that they are issued... that they have issued and take responsibility for. Now, maybe that's not what.

12:27:27 You know, we need to be doing here. Maybe that's not the right.

12:27:32 Do you think that we should be only looking at state sources? What kind of sources do you think.

12:27:38 should be included.

12:27:40 No, I think what you described is good, good, like, delineator. Um... Because you could... you could... add to that and say a QHIO.

12:27:50 Also has their own identifier. But they haven't done any interaction with the member in any way to verify that this data that they have is.

12:27:59 is actually that person. So, it's less authoritative.

12:28:04 But a health plan, other state agencies. They have, I would assume.

12:28:09 So, that would be the delineator there, I think.

12:28:12 And that's... that's at least the way I think we've been thinking about it, that what a QHIO has is derived.

12:28:19 Rather than authoritative. And it may be very good, but it's derived.

12:28:25 Julie, you have your hand up.

12:28:27 Yeah, I'm just really worried about. what this is going to mean for people who don't have access to their authoritative.

12:28:36 identity data. And so, are they... are they gonna be... not be able to participate in data matching? Are we not going to be able to coordinate their care?

12:28:49 You know, like, that's the big issue. Um, we do a lot of stuff now virtually, and so we have that extra layer of how do you take.

12:28:57 information, and how do you identify someone when they just have numbers? You know, how do you know that those... that's not someone's numbers they borrowed, or what have you, right? So we have all those things, but.

12:29:07 really, like, in day-to-day, a person experiencing homelessness with two bags that they are allowed to take into the shelter.

12:29:13 may not have their SIN number, may not have their social security number, may not have any of their identifying.

12:29:21 existing authority. authoritative identity sources.



12:29:25 what do we do with those folks other than.

12:29:28 duplicate... like, how do we handle that and still allow them to get their identity matched so that they can get care across.

12:29:37 different systems. And I'm really worried about this overemphasis, and I don't know the answer to.

12:29:44 You know, are we just gonna let people say they are who they are? Yeah, sometimes we are.

12:29:49 Sometimes we have to, that's the only way we can get them the care they need.

12:29:52 Um, so what do we do with that in terms of identity matching?

12:29:56 And what, you know, do we... are we holding ourselves to such a high standard?

12:30:01 that we're not, you know, we're not relying on just social security numbers, date of birth, address, familiar things that people know about themselves that they don't need to have something in their pocket to be able to.

12:30:14 use to be able to say, this person. is the same person, and we need to make sure they're getting the care they need.

12:30:20 Well, and that's a question that I really want to answer here, and I've been talking too much, so I'm not going to talk very much.

12:30:26 But in our minds, that's why we put the blue box in here, is that.

12:30:40 or DMV is down, and you can't verify that I have the right driver's license.

12:30:46 or I have nothing. But in any case, a search against authoritative services.

12:30:53 failed. And you know that. shouldn't you do something about it rather than just propagate that identity on in?

12:31:01 Uh, we've got some other hands coming up. Akira, if I can ask you to bring down the slides, I don't know that we need to have people stare at this diagram anymore, and I'd rather them stare at each other's faces and talk, so... But Sean, you've had your hand up.

12:31:15 Thanks, Rim. Um, one thing I'd be concerned with, and I don't know if I misheard you, were you thinking that a health plan identifier could be considered in a.

12:31:23 Authoritative ID, or... Value?

12:31:29 that that might be true. But... you tell me.

12:31:33 Yeah, I would be concerned, um, maybe we want to update or think of the authoritative sources that have.

12:31:40 immutable identifiers. Um, with the help time, if one system decides to migrate to a new EMR, for example.



12:31:48 where they change something from an IT perspective, you might see that identifiers change for the same person.

12:31:53 And how do we account for that in this model?

12:31:53 Okay?

12:31:55 That's what I would be concerned with. Uh, the second would be in the workflow, we have that.

12:32:00 duplicate ID, uh... line that's drawn, but what I'm not seeing is.

12:32:07 How is that communicated to participants? If there's a suspected duplicate from.

12:32:10 you know, my perspective, and I send it to you, Rim.

12:32:13 But then, for instance, how does Ken find out?

12:32:16 Or how does the next health system find that out? So.

12:32:19 Um, I would like to see a little bit more thought there, or really care around how do we.

12:32:24 Communicate out those duplicates, and I think there's additional problems that could.

12:32:28 It stem from that. If, for some reason, a duplicate's identified and, you know, there's help.

12:32:33 records that are linked, how do we communicate that they need to be unlinked now, because there is a valid duplicate? So, I think that's... that's an area to be concerned with.

12:32:42 Well, and I think that that's... you know, I draw these magical blue box where.

12:32:48 Magic happens, and things get fixed, and I don't know how that happens at all, but I think you're bringing up a good point, is.

12:32:56 Okay, it's one thing to say, I may have just broken something by creating a duplicate.

12:33:02 how the magic happens after that is a problem to be solved.

12:33:07 Eric, you've been very patient.

12:33:11 Sure, I think Julie's concerns really spoke to me. And, you know, is relevant to the experience that I've had.

12:33:19 you know, with the health exchanges and, you know, folks that are assisting.

12:33:23 Uh, with enrollment there. Um, so I wanted to ask, you know, with this model, Rim, I mean, the assumption would be that if folks are authorized, you know, members or.

12:33:31 providers of services that they would have the ability to search.

12:33:39 That's the thought, yeah.

12:33:34 against these authoritative sources, correct? Like, to enter... to enter as many factors, so the consumer wouldn't need to present with a benefits identification card or a driver's license.



12:33:46 But that we could gather, you know, enough information about them to find, you know, if an authoritative.

12:33:52 identity exists. just wanting to understand that.

12:33:56 That... That... that is my thought, yeah.

12:33:59 Yeah, I mean, one of the problems that we have, you know, that creates duplicates in the health... in the Medi-Cal.

12:34:05 You know, and covered California space is, you know, sometimes folks at the endpoint, when they may walk into an assister or to an agent.

12:34:13 Right, those agents don't have the ability to search. And so they're literally, you know, taking the consumer blind.

12:34:18 you know, entering them in, and that definitely results in a duplicate application. I think just the ability to facilitate and find a match up front.

12:34:26 closes, I think, one of the particular drivers that we've seen in, at least in the space that I've had experience within, so... You know, with that, you know, we know, right, we always want to err on the side of ensuring coverage.

12:34:37 or ensuring access to service over that. So there always needs to be a facility to resolve a duplicate if.

12:34:43 You know, if there's, you know, a problem later. So I think it's just... You know, what are the capacities? The magic box that you say where that resolves? And I do think that that, in some way, lies back in, you know, who is the payer for those services, right?

12:34:59 what's the relationship between the service provider and the payer, you know, how do they go back and resolve those duplicates back to that authoritative source? So, I mean, something that flags that, but... But definitely think... and really appreciate.

12:35:12 the solution here, and I think, you know, from my experience, just pushing that ability to search.

12:35:19 and find with limited, you know, limited information would really help resolve some of the problems that we've experienced. Not all of them, but a significant number. Thanks.

12:35:29 Okay, well, I think, again, I'm trying to collect characteristics, so thank you for that.

12:35:35 Eric, that's what I'm hoping people can come back here with, the ability to search with limited information, demographics.

12:35:43 is an important characteristic that we need to capture here. Danielle, you have your hand up.

12:35:48 Yeah, and I think, kind of, maybe in that same vein of... What are the characteristics we want here? I think.

12:35:54 Depending on how that facilitated workflow happens. We could be... the benefits of that might be outweighed by the complexity of adding another layer into this mix. I think we have to weigh, like.



12:36:07 What does that system do? If there's something in between.

12:36:10 You know, the requester that has the information that they're trying to find a match for.

12:36:15 And before, like, the authoritative sources. Are we appropriately applying logic that those authoritative sources have?

12:36:23 What information are you letting get searched? Is it appropriate for someone to be able to look that up with just the name?

12:36:29 phone number and address. What if it's someone looking up their neighbor that shouldn't actually get that information? How do we have.

12:36:37 trust, and are you having to recreate that in that middle layer, and is that going to add unnecessary complexity?

12:36:43 Or, you know, the benefits outweigh that. Um, so I think that's just something to keep in mind of... adding any another step in the process adds complexity, and it has to really be worth it.

12:36:54 Thank you for that. I think that, I think you're right, I think that's a good thing for us to keep in mind. It's going to be something that we're going to have to be reaching out to you all, or our stakeholders in general, to understand.

12:37:07 When we cross that line. So, um, I... but I think it's good.

12:37:10 One of the other characteristics that I heard mentioned was some indication about the certainty of a match.

12:37:17 How important do we think that is to be part of this system?

12:37:20 Who was it that made that comment? I can't remember again already.

12:37:25 That was me, that was Lloyd. And... And by certainty, I mean.

12:37:28 up to and including the point that was just made about.

12:37:33 Is... is this... have we verified that this is the actual person, right? And this deals with this with IAL levels and so on, but it's a continuum.

12:37:43 From... and a lot of it is risk-based. That... that given that all I know is that you told me your name and your address and your phone number, and that's all I know about you.

12:37:56 That information needs to go along with. All of the requests and other things that we make, and then people may say that, no, given that that's all you know, we can't give you this information. It's too risky.

12:38:11 All the way up to, yes, I saw you in person, I looked at your identifier, I said you're... You know, in the lingo, it's IAL.

12:38:22 2 or IAL3. That goes along with the request, and now... that same person could say.

12:38:23 Mm-hmm.



12:38:29 oh, given that I know that you did all of this, and I trust you.

12:38:35 And I think... Okay.

12:38:33 You can have that information. So, that's what I'm talking about, the uncertainty is on both dimensions, in terms of the information that was provided and how much the identity was verified, the actual human identity.

12:38:48 I think that's an interesting point, because I'm not aware of many systems.

12:38:53 Outside of... Uh, identity verification, not matching, but identity verification to do that, so that's an interesting.

12:39:00 dimension of this, Lloyd. Thank you for that. Julie, you've had your hand up.

12:39:05 Yeah, I mean, I think we have to think of risk differently, depending on what the use of the data sharing is.

12:39:13 And really hold the values that we're trying to accomplish, so when we're.

12:39:19 You know, if this person is in the right person, or the same person that we think they are, but this person needs food.

12:39:25 We're gonna get the person food, even if we can't confirm that this person is the person. You know, I mean, I think we have to remember.

12:39:33 That the... what we're doing for folks. Um, there are different layers, right? And fraud versus, you know, the worry about fraud or misidentifying versus not getting something to a human being that needs something is really important, and we have to continually balance that.

12:39:51 So, how do we balance that? Do you believe that, you know, the organizations that are delivering services have a responsibility there, or a capability there? How do we handle that?

12:40:01 Yeah, I mean, the truth of the matter is, probably the system that has the most duplications is the homeless system of care, right? If you think about systems.

12:40:10 Because these are folks who often have. you know, very few safety nets.

12:40:16 And we will air on getting people what they need.

12:40:20 Over making sure that they are exactly who they say they are, right? Obviously, when you're in high-risk situations, you're going to do that more.

12:40:29 Um, and every time we make a decision about whether this is enough to be able to say some... to be able to say this person matches.

12:40:38 It's what is... what is the high... what is the risk of not matching, and what is the risk of matching inappropriately?

12:40:45 And each situation is going to be a different level of what comfort level we have as risk.

12:40:49 Um, I think what needs to be center is the patient or the person as we make those decisions.



12:40:57 Right, great. Thank you. I'm just gonna warn people that, um.

12:41:02 Uh, we've been having a really good conversation here, and there are a few people who have been silent, and you know that if you've been on the TAC meetings before, that sometimes I call people out, so just... Be prepared for that if nobody...

12:41:14 Raises their hands, might hear your name. Aaron, you do have your hand up, though.

12:41:20 Yeah, I just wanted to add to that, um... I think that's where the confidence level.

12:41:28 Needs to come in, because of course, we're never going to deny care in any way.

12:41:33 And the identity data provided to provide that care may not be very good.

12:41:39 But there's an opportunity there as well, which is, I think, what we want to capture, which is, in order to.

12:41:45 You know, help that person in the future. If a match can be made.

12:41:53 Then the next healthcare provider. We'll now be able to see the data about those services that were provided.

12:42:00 We know that's not, in many cases, especially the homeless.

12:42:05 The opportunity that... Those matches are not going to be great.

12:42:09 But maybe better than what we have today. So that's... that's kind of where the opportunity is. Um... But maybe that data is just gonna end up being something that's very low confidence.

12:42:21 Um, for others who are... Trying to link to that record in the future.

12:42:29 Thank you, Aaron. Eric, you have your hand up.

12:42:27 Right.

12:42:38 Totally agree that there's an opportunity, right? That you can provide services, and then... You know, look at leveraging that. I do know, at least for public assistance programs, like, within.

12:42:49 Um, you know, county public assistance programs. The rules for, you know, verifying identity, right? Like, a program has identity verification before it issues benefits. Like, to some extent, that level of confidence.

12:42:59 varies depending on the program or the payer of the program, or what's coming out. And so, you know, that may rest with.

12:43:06 You know, the comfort level either of the service provider themselves with, you know, what are they allowed to do.

12:43:12 Right, or the, you know, the person that's ultimately funding those benefits in terms of what that confidence is. And I don't know that the system necessarily needs to have that, right? It's something that would be known.



12:43:22 you know, what service am I trying to attach them to, and what are the requirements for that service, and do they meet that? And, you know, just looking at public assistance, you know, programs, right, the standards for identity.

12:43:33 Right? The residency, all these kinds of things vary from program to program, um, in terms of what the standard, the threshold that needs to be met to do that. And so folks that are providing services in those areas and funding that, you know, may know that this is what's needed. But.

12:43:48 But I do, you know, go back. I think the point is, you know, however close we can get in terms of matching gives us the ability to have a conversation about, you know, what's more needed to get to this level of service. And, you know, this person is falling into a gap, you know, how can we reconnect them?

12:44:05 Thank you, Eric.

12:44:02 Right? So...

12:44:09 Yeah. Thank you, Eric. Um, we don't have our QHI representative with us here today, but.

12:44:18 Ken, I'm sorry, I'm gonna call you out. I know that you work from a healthcare standpoint that you're working at, trying to deal with identities on a regular basis. Do you have any thoughts about today's conversation?

12:44:32 Letting it all marinate. Um, a lot of things kind of resonate with me, and having this discussion, it feels a lot like déjà vu, to be honest with you.

12:44:39 For those of us who've worked in the QHIO or HIE realm for a long time, you know, the master EMPI of sorts.

12:44:46 that's the holy grail of data exchange, right? the ability to facilitate data exchange on a trusted.

12:44:53 Um, identity or record. It's never been able to be retrieved, and part of me can't help but think that.

12:45:00 we're kind of addressing the symptom. Um, not necessarily the full holistic problem.

12:45:07 By and large, a lot of this workflow that we're talking about has a human nature factor to it. Julie touched on it.

12:45:12 Now, when you have someone in crisis or someone right in front of you.

12:45:16 we're not going to care about who they are. We want to give them treatment, service, or whatnot.

12:45:22 So that's going to result in a lot of the workflows that we have in front of us, where, well, I've got 20 John Does from the last 20 days, you know.

12:45:28 How do we reconcile that? I would caution looking at it strictly from a technology perspective. I think that's the takeaway.

12:45:37 I think for, you know. 12 plus years, we've tried to look at it from a technology perspective, and.



12:45:43 doesn't always match. I think we need to look at it much more holistically.

12:45:47 Look at the workflows, uh, look at best practices.

12:45:50 Are there mechanisms that allow us to be a little bit more.

12:45:55 You know... have the ability to reconcile records, so to speak. You know, it may not be something we can solve right out of the gate with the initial.

12:46:03 contact or point of care. Uh, but there might be some workflows that need to be reviewed.

12:46:08 that lend itself, so the technology can assist versus dictate.

12:46:11 Um, how we're gonna manage identities.

12:46:14 Yeah. Thank you, Ken. Um... I might also call it, uh, attention to one of the comments in Q&A from Dan Chavez that also said this is not just a technology.

12:46:26 Uh, question, but, uh, about maturity as well, and, you know, maturity of an identity, or... maturity of identity management, so... I think it is important to acknowledge that this isn't just a.

12:46:56 I'm interested in any thoughts you might have.

12:46:58 Yeah, no, I think everybody is, uh, definitely hitting on the target, Julie's comments, definitely, and um... Um, a few other comments that really strike hard and, and uh.

12:47:19 Um, which is, uh, um, you know, something to consider.

12:47:24 Um, one thing that I've been thinking about and opining on as we've been talking about it.

12:47:30 is, um, if the unauthoritative organizations are delivering the identity.

12:47:35 By combining authoritative organizations' data. Couldn't the identity management be handled by the unauthorized organizations as the trusted identity.

12:47:47 Authority. Sorry, there's a lot of authority being thrown out there, but... If... if the un... authorized organizations, like, think of a QHIO.

12:47:58 is doing the exercise of taking authorized. Organization's data, combining it to get to an identity around an individual.

12:48:09 wouldn't they have the burden of being the identity, trusted authority out there, and couldn't that be a service or role that they could play?

12:48:17 As well as other intermediaries within that layer. Because I think the thing that struck with me a lot is somebody's comments about creating extra layers and steps and combining data and having to search.

12:48:29 Different identities from different authoritative organizations. adding complexities and time to service.

12:48:36 If the QHIOs, there's already organizations that are that middle layer, that are combining this information.



12:48:44 couldn't that speed up the process?

12:48:47 Thank you for that, Chris, and just, um, that... that is an interesting.

12:48:53 I think, for us to ponder a little bit... Understanding that, what, about two-thirds of DXF participants are using a QHIO today, and the other third are not. So, where does that leave them?

12:49:05 I think that's an interesting thought. Sean, I see your hand up. You may be the last comment before we go to public comment.

12:49:14 Thank you. I'll just kind of... Put out there, and this is based off of some of Julie's feedback.

12:49:19 I think it's important to consider the purpose for looking up a person's identity.

12:49:24 I think there's elements of privacy here that we have to honor, so... That might be a point of consideration for DXS if we are considering the model you propose.

12:49:32 We should likely consider why is somebody actually looking for someone's identity?

12:49:37 What is the purpose of it? And I think that.

12:49:39 helps some of the different segments that are on the call here better manage how they use that reply and data.

12:49:47 Um, and then I think it could enable organizations to honor consent, because I think that's.

12:49:51 you know, a past TAC committee, but, you know, kind of keeping my thoughts there. Uh, HIPAA-protected entities, we want to make sure that.

12:49:59 We're following the right things, um, and doing the right thing, and consent is a large part of that. So, uh, knowing the purpose, why, and identity is being looked up, and as we're crossing different segments of care.

12:50:10 might be helpful, so I just want to put that out there for the group.

12:50:12 I appreciate that, and... Um, I said when we started off that our goal today wasn't to fully cook a solution, and I.

12:50:20 Don't think that we've fully cooked a solution here.

12:50:23 But I do believe that we've been successful in doing what I wanted to accomplish. So, Vishan.

12:50:29 As mentioned that one of the characteristics of a solution needs to be.

12:50:33 Um, the ability to communicate, or maybe the requirement to communicate the purpose for why you're searching for an identity. We heard about the need to.

12:50:45 Uh, be able to indicate, uh, how certain you are.

12:50:51 of the actual identity, because you have them in front of you, or... Um, the, uh, certainty of a match, or, um, how do you deal when there are no authoritative sources? I think we've.

12:51:02 We've managed to collect some of those characteristics that we wanted to.



12:51:07 Uh, Akira, if you can take us to public comment, I think that's.

12:51:10 where we are in our meeting.

12:51:12 Yes, thank you, Rim. Members of the Father must raise their hand, and Zoom facilitators want to mute each member of the public for them to share comments.

12:51:20 If you logged in via Zoom, press raise hand at the bottom of your screen. If you selected to share your comment.

12:51:27 You will receive a request to unmute. Please ensure you accept before speaking.

12:51:31 If dialed in by phone. phone, press star 9 on your phone and raise your hand.

12:51:37 And listen for your phone number to be called.

12:51:40 If selected to share your comment, please ensure you are unmuted on your phone by pressing star 6.

12:51:45 People will be called in the order in which their hands were raised, and will be given 2 minutes.

12:51:51 Please state your name and organizational affiliation when you begin.

12:52:00 Thank you. Akira will give people a few minutes to raise their hands.

12:52:14 We have no hands raised at this time, but we can give them a few more minutes.

12:52:17 Yes, let's do that.

12:52:34 So, do we have any hands raised, Kira? Okay, well, it sounds like we've got a relatively.

12:52:37 Not currently at this time.

12:52:43 quiet public today. There have been a few. items in the Q&A if people want to take a look at those.

12:52:50 Let's go on to the next slide. And we'll give people a few minutes back today. Again, I really want to thank everybody. We took on what I thought was a hard problem here.

12:53:00 And, um... a lot of... I'll just reiterate a lot of what we've been hearing at DXF is that identity is a problem.

12:53:10 But what that problem is, and what, you know, what are the types of things that we can do about it has not been part of that concern.

12:53:21 Until you guys helped us identify that. So, I'm very appreciative of giving us a better understanding of what the problem statement is, and I, again, think that today we identified some of the.

12:53:33 Characteristics of a solution. Not a solution, but the characteristics of a solution that'll help us move the ball forward, and so I think that that's... that's where we have been.

12:53:44 Um, over the course of the tax series. Uh, this, uh, year.



12:53:50 We've talked about social services exchange, we've talked about consent management, we've been talking about event notifications and now in identity management.

12:54:00 There are a lot of different aspects of how we're trying to move information forward.

12:54:05 Um, and it's given us a lot to think about, so I want to thank everybody for their participation in this.

12:54:12 And to many of you in some of the other tax series as well.

12:54:16 And I'll give everybody 6 minutes back in their day, and thank you for your participation.