



Data Exchange Framework

Technical Advisory Committee (TAC) Meeting #4A: Identity Management

Thursday, October 9, 2025

12:00 PM – 1:00 PM PT



Members are strongly encouraged to **enable their video** to foster increased interaction and discussion.

The Vision for Data Exchange in California

Every Californian, no matter where they live, should be able to walk into a doctor's office, a county social services agency, or an emergency room and be assured that their health and social services providers can access the information they need to provide safe, effective, whole-person care while keeping their data private and secure.

California's Data Exchange Framework (DxF) will help achieve this vision and improve care for all Californians by enabling statewide, secure data exchange between health and social services providers.



Agenda



- 12:00 PM
Welcome & Roll Call
- 12:05 PM
Introductions
- 12:15 PM
TAC Role & Framing the Focus Group Series
- 12:20 PM
Defining Identity Management
- 12:25 PM
Identity Management: What Works? What Doesn't?
- 12:50 PM
Public Comment
- 12:55 PM
Next Steps and Closing Remarks

Identity Management TAC Members



Members are strongly encouraged to **enable their video** to foster increased interaction and discussion.

Name	Organization
Rim Cothren (Chair)	Center for Data Insights and Innovation
Cindy Bero	Manatt Health Strategies
Aaron Goodale	MedPOINT Management
Ashutosh Pandey	ACOE
Benjamin Beasley	California Department of Public Health
Chris Ticknor	Orange County United Way
Craig Sanderson	CommonSpirit Health
Danielle Friend	EHRA
Dr. Brian Thomas	Alameda County SHIE
Eric Jahn	Bitfocus, Inc.
Eric Nielson	California Welfare Director's Association (CWDA)

Name	Organization
Jack Cheng, JD	Chinatown Service Center
Jeff Jarrett*	Pacific Partners Management Services
Jeff Spevacek	Verato
Jennifer Womack	California Department of Public Health
Joe Sullivan	Emergency Service Medical Authority (EMSA)
John Helvey	SacValley MedShare
Julie Silas	Homebase
Ken Riomales	CalMHSA
Lloyd Fischer	Centene Corporation (Healthnet)
Mukund Wadekar	California Department of Social Services
Uma Chandavarkar, MD, MHA	California Department of Healthcare Services
Vishaun Lekraj	Kaiser Permanente

Public Comment Opportunities

Public comment will be taken during the meeting at the approximate time listed on the agenda and limited to the total amount of time allocated for public comment.

Members of the public may also use the Teams Q&A feature to ask questions or make comments during the meeting, or can email their questions or comments to DxF@hcai.ca.gov.

Members of the public are kindly asked to refrain from using the 'raise hand' feature until the designated public comment period to avoid disruptions.

Technical Advisory Committee (TAC)

Meeting Format and Post-Meeting Documentation

Meeting Format

- Materials may be circulated in advance of each meeting to help members prepare
- Meetings will minimize presentation and focus on discussion
- Meetings will be open to the public and time will be reserved for public comment

Post-Meeting Documentation

- Meetings will be recorded (including Q&A) and recordings will be posted on the DxF webpage following the meeting
- Materials for each meeting will contain a summary of “what we heard” in the previous meeting in the series
- A summary of the meeting discussions and recommendations will be posted when the series is complete

Technical Advisory Committee (TAC)

Composition, Cadence, & Output



Composition

- Subject matter experts with technical and operational experience in data exchange representing health and social service providers, intermediaries, vendors, and state/county government



Meeting Cadence

- HCAI anticipates four, one-hour meetings held every other week
- For continuity, members are asked to prioritize attendance at all meetings if possible



Output

- HCAI seeks actionable recommendations from TAC members that might be implemented by DxF.

Identity Management TAC Series Objective

The objective of this meeting series is to **identify, characterize, and prioritize the issues in statewide identity management that DxF needs to address.**

Defining Identity Management for DxF (1/3)

The Strategy for Digital Identities was published in July 2022 as required under AB 133 with input from stakeholder focus groups, public comment, and Advisory Group feedback.



- **The Strategy defines a digital identity** as “the collection of attributes that establishes an identity associated with a real person in a specific context; in this case the context is for use on the Data Exchange Framework to exchange health and social services information.”
- A “**unique digital identity**” is then defined “a digital identity that uniquely identifies a specific real person and distinguishes that individual from all others.”



- **The Strategy proposed a single, focused purpose for digital identities for the Data Exchange Framework:**
 - *“to associate accessed or exchanged health and social services information with the correct real person.”*
- This use case is sometimes **referred to as person matching** and often accomplished using an enterprise master person index (eMPI).

In other contexts, the term “identity management” may refer to identity assurance, IdAM (identity and access management, often authentication and authorization).

Defining Identity Management for DxF (2/3)

The *DxF Roadmap* published in February 2025 identified Identity Management as a set of capabilities necessary for the successful implementation of the Roadmap's pillars.



Identity assurance: A process used to assure that identifying information about an individual is associated with the correct person.

- It usually includes processes in which an individual provides documented evidence identifying themselves to an authority. This process may result in granting the individual credentials later used in access management.

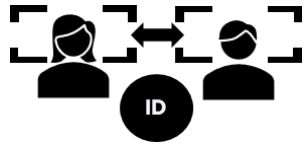


Access management: The process by which an individual authenticates themselves, often using credentials issued upon completion of identity assurance, and is granted access to data based on their identity and business rules for their role in accessing the data.

- The processes may enable different access for individuals that are the subject of the information, their representative(s), their family member(s), or their provider(s). Access management often involves Identity Governance and Administration (IGA) to streamline access assignments and maintain regulatory compliance.

Defining Identity Management for DxF (3/3)

The *DxF Roadmap* published in February 2025 identified Identity Management as a set of capabilities necessary for the successful implementation of the Roadmap's pillars.



Person matching: A process that uses person attributes such as name, date of birth, address, phone number, or unique identifiers to establish a digital identity associated with the same real person across systems.



Record linking: A process that links records, such as items of HSSI, belonging to the same real person into a single, consolidated record using these same person attributes. Person matching may use master person index (MPI) technology that employs sophisticated probabilistic and/or referential methods, and sometimes machine learning, to match identities. Health care entities often use MPIs in turn to assist in record linking by matching identities associated with different elements of health and social services information.

Defining Identity Management for DxF



- Should a focus on person-matching for individuals that are the subject of health and social services data exchange and record linking continue to be the priority for the DxF?
- Are there other priorities related to identity – beyond person-matching and record linking – where DxF needs to develop strategies, policies, or solutions?

What Works? What Doesn't?

Strengths?

- Where have you seen person-matching work well?
- Are there capabilities or characteristics associated with person-matching success?
- Are these characteristics found in today's DxF?



Struggles?

- Where have you seen person-matching struggle?
- Are there capabilities or characteristics associated with person-matching challenges?
- Are these challenges found in today's DxF?



Public Comment

Next Steps

The DxF Team will:

- Post meeting materials and recording to the DxF webpage.
- Share pre-read materials for next TAC meeting with members.

Members will:

- Be prepared to discuss the challenges of person-matching and which of these should be the greatest priority for the Data Exchange Framework.

Upcoming Meetings

Identity Management TAC Focus Group	Date
Meeting #4B	Thursday, October 23, 2025, 12:00 PM – 1:00 PM PT
Meeting #4C	Thursday, November 6, 2025, 12:00 PM – 1:00 PM PT
Meeting #4D	Thursday, November 20, 2025, 12:00 PM – 1:00 PM PT