Data Exchange Framework (DxF)

DxF Lunch & Learn: Physician Organizations and Medical Groups

Friday, November 20, 2026

12:00 – 12:30 pm PT

Department of Health Care Access and Information

DATA EXCHANGE FRAMEWORK

Item #1

Welcome & Introductions

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Agenda



Item #1	Welcome & Introductions
Item #2	History of the DxF and Vision
Item #3	Physician Organization and Medical Group Requirements
Item #4	How to Sign the Data Sharing Agreement
Item #5	Helpful Resources & Thank You

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Item #2

History of the DxF and Vision

Overview of Assembly Bill (AB) 133

In July 2021, Governor Newsom signed AB 133, which enacted *Health and Safety Code section 130290,* directing CalHHS to establish a statewide policy and governance framework for health data exchange.*

1	**Data Sharing Agreement (DSA)**	Required CalHHS to establish a single DSA and a common set of technology-agnostic policies and procedures (P&Ps) governing rules of health information exchange.
2	**Required Signatories**	Defined most general acute care hospitals, physician organizations and medical groups, SNFs, health plans and disability insurers, clinical labs, and acute psychiatric hospitals as required signatories of the DSA by January 31, 2023. AB 133 did not establish enforcement or accountability mechanisms for required signatories.
3	**Health Information Gaps**	Directed CalHHS to identify gaps in the health information life cycle (e.g., creation and storage) to inform the development of the common set of P&Ps.
4	**Digital Identities**	Mandated CalHHS to publish a strategy for unique, secure digital identities to support master patient indices (MPIs) for public and private organizations in California by July 31, 2022.
5	**DxF Governance**	Mandated a stakeholder-driven development process and required CalHHS to convene an advisory group. This became the Stakeholder Advisory Group and its DSA Subcommittee in 2021.

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*AB 133 reflected a policy and governance approach over statewide HIE investment as other states have chosen. Fragmentation across the state and gaps in federal interoperability further signaled a need to act.

DxF Vision & Guiding Principles

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.

Guiding Principles*

- Advance Health Equity
- Make Data Available to Drive Decisions and Outcomes
- Support Whole Person Care
- Promote Individual Data Access
- Reinforce Individual Data Privacy & Security
- Establish Terms & Conditions for Data Collection, Exchange, & Use
- Adhere to Data Exchange Standards
- Accountability

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Sources: CalHHS. DxF Implementation Toolkit; CalHHS. Data Exchange Framework Guiding Principles.

**Guiding Principles were developed in 2021-2022 and may be revisited.*

Overview of the DxF

The DxF is comprised of a single statewide Data Sharing Agreement (DSA) and Policies and Procedures (P&Ps), supported by operational programs that facilitate exchange.

Data Exchange Framework

Data Sharing Agreement

A legal agreement that a broad spectrum of health care organizations execute. Document focuses on the key legal requirements.

Policies & Procedures

Fifteen (15) published Policies detail and guidance to support on-the-ground implementation.

Operational Programs

QHIO Program

A program that designates qualified organizations to support implementation of DxF requirements and enable health information exchange.

Participant Directory

A centralized, statewide directory that enables discovery of DxF Participants and supports health data exchange compliance.

Grants Program

A state-administered grant program providing funding to support implementation of DxF requirements and build exchange capacity.

Impact Measurement

A quarterly data collection and analysis effort measuring DxF implementation progress and impact on health information exchange in CA.

Item #3

Physician Organization and Medical Groups (POMG) Requirements

"Physician Organizations and Medical Groups" (POMG) Definition

(A) A medical group practice, a professional medical corporation, a medical partnership, or any lawfully organized group of physicians and surgeons that provides, delivers, furnishes, or otherwise arranges for health care services.
(B) An independent practice association, to the extent that it maintains electronic health information on behalf of their participating physicians.
(C) A medical foundation exempt from licensure pursuant to subdivision (I) of Section 1206.
(D) A community clinic licensed under subdivision (a) of Section 1204, an intermittent clinic exempt from licensure under subdivision (h) of Section 1206, or a rural health clinic, as defined in paragraph (1) of subdivision (I) of Section 1396d of Title 42 of the United States Code.
(E) A specialty clinic, as described in paragraphs (1) to (3), inclusive, of subdivision (b) of Section 1204.
(F) An ambulatory surgical center or accredited outpatient setting.

Health and Safety Code 130290(b)

DxF Required Signatory Methodology

HCAI will publish the DxF Required Signatory Methodology to support signatories in understanding which entities are required to comply with SB 660 DxF DSA signing requirements.

- The DxF Required Signatory Methodology outlines the parameters HCAI uses to determine the denominator of required signatories by entity type as defined by HSC Section 130290(f)*.
- The methodology relies on public data sources, California licensing and regulatory agency data, and HCAI datasets.
- The methodology was informed by stakeholder feedback, including review by state associations representing providers.
- HCAI will continue to develop and refine the methodology as licensing and regulatory information evolves and stakeholder feedback is received.

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*California HSC Section 130290(f) (as amended by Stats. 2025, Ch. 325, § 1 (SB 660, Menjivar), effective January 1, 2026).

Non-Compliance List Posting

"Commencing January 1, 2027, the department shall publish and keep current on its internet website the names of any known entities the department deems not to be in compliance with the requirement to execute the California Health and Human Services Data Exchange Framework data sharing agreement pursuant to subdivision (f)."*

- The deadline for required signatories to sign the DxF DSA to avoid being included in the January 1, 2027 Non-Compliance List is **December 1, 2026**.**
- The list will then be **updated periodically** to reflect any changes in compliance status among required signatories.
- Entities will have the opportunity to submit documents to HCAI to appeal or explain their non-compliance.
  - Any **statements of extenuating circumstances** will also be published on the DxF website.
- Further detail will be provided in the **SOP: DxF Non-Compliance List**.

Supporting Documents***

- Non-Required Signatory Attestation - *Attest compliance or non-required signatory status*
- Statement of Extenuating Circumstances - *Explain circumstances impacting ability to execute the DxF DSA*
- Non-Compliance Appeal - *Appeal HCAI non-compliance determinations (to be developed)*

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**California HSC Section 130290(k) (as amended by Stats. 2025, Ch. 325, § 1 (SB 660, Menjivar), effective January 1, 2026).*
***The January 1, 2027 list includes only signatories whose DSA execution deadline was on or before January 1, 2027. Signatories with a July 1, 2027 deadline will appear in a listing update published after July 2027.*
****All supporting documents will be posted in the DxF Resource Library under "Compliance".*

Item #4

How to Sign the Data Sharing Agreement (DSA)

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How to Sign the DSA

The Data Sharing Agreement (DSA) is a single agreement made between Participants intended to facilitate data exchange in compliance with all applicable federal, state, and local laws, regulations, and policies. Participants that sign the DSA shall also abide by the DxF Policies and Procedures.

3 Key Steps in Signing the DxF Data Sharing Agreement

1. **Register for an account.** On the DxF DSA Signing Portal account, create an account with your business email and verify it with two-factor authentication. Each organization is associated with one portal account and one "Registered User" (organization's designee for accessing the account on the portal).

2. **Add your organization details.** Once signed into your organization's DSA Signing Portal account, add information about your organization. This information will populate the DxF Data Sharing Agreement.

3. **Send and e-sign.** Once the information on your organization is complete, trigger the DSA to be sent to you on the Portal. The Signatory gets an Adobe Acrobat Sign email and e-signs.

Item #4

Data Sharing Agreement (DSA) Signing Portal Demo

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Welcome to the Data Exchange Framework (DxF) Data Signing Agreement (DSA) Signing Portal and Participant Directory.

Signing the DSA is a critical first step toward full implementation of the DxF.

DxF Participants are also required to complete the Participant Directory choices indicating the methods by which the organization will be exchanging health and social services information with other Participants, per the Participant Directory Policy & Procedure.

Click on “My Organizations” to create, sign, review, or amend your DSA, or to enter, review, or update your choices for exchange in the Participant Directory.

My Organizations



My Organizations

California Health and Safety Code § 130290 (aka SB-660) requires certain California entities sign the Data Exchange Framework (DxF) Data Sharing Agreement (DSA). The DxF DSA incorporates a series of policies and procedures (rules and requirements for participation), which can be found on the HCAI DxF website (https://dxf.chhs.ca.gov/policies-and-procedures/).

To sign the DSA to become a DxF Participant, complete the information on the Primary Organization (required) and Subordinate Organizations (if applicable). Once the information is complete for the Primary and Subordinates (as applicable), click to 'Send DSA for Signature', triggering an email to the Signatory for electronic signature.

Primary Organization: the parent organization that will be signing the DSA.

Subordinate Organizations: as applicable, add any facilities that are part of the parent Primary Organization where the signatory of the Primary Organization has authority to sign on their behalf. For example, the CEO of a health system might be authorized to sign on behalf of multiple hospitals and medical groups.

For information on the CalHHS DxF, visit the DxF Website.

To receive updates on the DxF, sign up here.

Please complete organization information before signing the DSA.

Send DSA for Signature

Add your primary organization here

Primary Organization

Add Primary Organization

Account Name	DxF ID	Account Status	Terminated or Ceased	Delaying Exchange Until	Request for Information	Information Delivery	Request for Event Notification

There are no records to display.

Subordinate Organizations

Add any additional subordinate organizations that are participating in Exchange of HSSI under the DxF as required in the Participant Directory P&P.

Primary Organization Information

If it has not, click here

Check to see if your organization has already signed the DxF Data Sharing Agreement (DSA).

Organization Name

Clinic

Add new organization

First, check to see if your organization has *already signed*



Oops! The organizations below have already signed the DSA.

If your organization appears below and has already signed the DSA, do not sign again. Email DxF@hcai.ca.gov if you have questions about access to your organization's DSA Signing Portal account.

Primary Organization	Subordinate Organization	DxF ID	Type	Sub Type	Street Address	City	State	Zip
3C COMMUNITY CLINIC		DXF009682	Ambulatory Care Settings	Federally Qualified Health Center (FQHC)	3030 West Olympic Boulevard	Los Angeles	CA	90006
ABC CHILDREN'S CLINIC		DXF004576	Acute Care Settings	Other acute care setting	26750 Towne Centre Dr Ste A	Foothill Ranch	CA	92610
ABM Medical Clinic Inc		DXF001699	Ambulatory Care Settings	Physician practice	21133 Costanso St	Woodland Hills	Californ	91364
Accredited Dermatology Medical Clinic		DXF008554	Ambulatory Care Settings	Physician practice	PO Box 10481	Fullerton	CA	92838
ACCURATE CLINICAL LABORATORY CORP.		DXF009761	Community-Based Organizations	Other community-based service provider	18800 Amar Road Suite C-11	Walnut	CA	91789
ADVOCATE FAMILY MEDICINE CLINIC		DXF009707	Ambulatory Care Settings	Clinic – Community, intermittent, rural	1330 West Covina Boulevard	San Dimas	CA	91773
Alameda Health System	Alameda Hospital Clinical Laboratory	DXF001568	Ancillary Care	Clinical laboratory	2070 Clinton Avenue	Alameda	CA	94501
Alameda Health System	Eastmont Wellness Center Clinical Laboratory	DXF001570	Ancillary Care	Clinical laboratory	6955 Foothill Boulevard	Oakland	CA	94605
Alameda Health System	Fairmont Hospital Clinical Laboratory	DXF001574	Ancillary Care	Clinical laboratory	15400 Foothill Boulevard	San Leandro	CA	94578
Alameda Health System	Highland Hospital Clinical Laboratory	DXF001569	Ancillary Care	Clinical laboratory	1411 East 31st Street	Oakland	CA	94602

Primary Organization Information

See 'Help' tab or 'DSA Signing How To Guide' for help

Enter the legal name and information for the parent Primary Organization that will be signing the DSA.

Signatory: select "Self" if you will be signing the DSA, or "Other" to enter information on another organizational official authorized to sign. An example for using "Other" Signatory is if you are an administrator registering in this portal but the DSA will be signed by the President or CEO.

Click on the 'Help' tab above for more information on:

- Entering CA License Number or EIN
- A complete list of Types and Sub Types

Participant Directory: make Participant Directory selections for the Primary and any Subordinate Organizations, indicating the methods by which Health and Social Services Information will be exchanged.

Subordinate Organizations: as applicable, add any Subordinate Organizations on the My Organizations page prior to Sending the DSA Document for Signature.

Complete the information on your organization

Don't Save | Save & Close

Details

Name *
My Clinic

NPI *

☐ **I attest that I do not have an NPI**

Type *

CA License Number

Business Address

Address *

☐ **Address Not Found?**

Street 1 *

Street 2

City *

Status

Created

Signatory

Signatory *
Select

Complete information on the methods by which you exchange

See the 'Participant Directory How To Guide' for help

Participant Choices (and other required information)

Please enter choices in this Participant Directory section for how you will exchange Health and Social Services Information to comply with requirements DxF Participant Directory P&P. See the DxF Participant Directory How To Guide for step-by-step instructions.

Eligibility to Delay Exchange

Per Health and Safety Code § 130290 and the DxF Policies & Procedures, certain types of organization are eligible to delay Exchange of or Access to Health and Social Services Information (HSSI) under the DxF. If your organization is eligible and elects to delay exchange, select the appropriate checkbox below. If your organization is not eligible, please do not check a box and proceed to the Methods of Exchange subsection below.

HSC § 130290(b)(5) permits facilities described in HSC § 130290(f)(2)(D) to delay until 07/01/2027

☐ **I exercise my option to delay Exchange of HSSI under the DxF until July 1, 2027.**

HSC § 130290(b)(3) permits facilities described in subdivision (a) of HSC § 1180.2 to delay until 01/31/2029

☐ **I exercise my option to delay Exchange of HSSI under the DxF until January 31, 2029.**

Methods of Exchange

☐ **Copy the choices for this primary organization to all subordinate organizations**

Choose the entity that you prefer other Participants or their Intermediaries use to send you requests for HSSI you Maintain. If you do not Maintain HSSI or intend only for your subordinate organizations to exchange HSSI, you may choose NOT APPLICABLE. You may choose SELF if you prefer point-to-point interfaces to your own technology. You may choose OTHER if the entity you prefer is not listed. Do not leave this choice blank.

Please choose one:

Select

Primary Organization

Add Primary Organization

Account Name	DxF ID	Account Status	Terminated or Ceased	Delaying Exchange Until	Request for Information	Information Delivery	Request for Event Notification

There are no records to display.

Subordinate Organizations

If applicable, add subordinate organizations

Add any additional subordinate organizations that are participating in Exchange of HSSI under the DxF as required in the Participant Directory P&P.

Add Subordinate Organization to DSA | Add Subordinate Organization to Participant Directory

Account Name	DxF ID	On DSA	Terminated or Ceased	Delaying Exchange Until	Request for Information	Information Delivery	Request for Event Notification

There are no records to display.

There are two options for adding Subordinate Organizations for DxF participation.

- Option 1: add a Subordinate Organization to your DxF Data Sharing Agreement, which also automatically adds the Subordinate Organization to the DxF Participant Directory Listing. Note: if your DSA has already been signed, adding a Subordinate Organization will require resigning the DSA.
- Option 2: add a Subordinate Organization to the DxF Participant Directory Listing. This does not add the Subordinate Organization to your signed DSA.

Contacts

Please add additional contacts in the event that the organization's registered account user or authorized signatory cannot be reached.

Add additional organizational contacts here to ensure continuity

Add Additional Contact

Full Name	Email	Job Title	Business Phone	DxF Role

There are no records to display.

My Organizations

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To receive updates on the DxF, sign up here.

When ready, click to send the DSA document for e-signature

Send DSA for Signature

Primary Organization

Add Primary Organization

Account Name	DxF ID	Account Status	Terminated or Ceased	Delaying Exchange Until	Request for Information	Information Delivery	Request for Event Notification

Helpful Resources

- Data Sharing Agreement Signing Portal: https://signdxf.powerappsportals.com/
- DxF Data Sharing Agreement – How to Guide: https://dxf.chhs.ca.gov/wp-content/uploads/sites/6/2026/03/DxF-Data-Sharing-Agreement-How-To-Guide.pdf
- DxF Participant Directory – How To Guide: https://dxf.chhs.ca.gov/wp-content/uploads/sites/6/2025/07/DxF-Participant-Directory-How-To-Guide.pdf
- All DxF FAQs: https://dxf.chhs.ca.gov/faq/
- DxF Informational Bulletin: https://dxf.chhs.ca.gov/wp-content/uploads/sites/6/2026/10/DxF-Informational-Bulletin.pdf
- DxF Required Signatory Methodology: https://dxf.chhs.ca.gov/wp-content/uploads/sites/6/2026/11/DxF-Required-Signatory-Methodology.pdf
- Questions: dxfsupport@hcai.ca.gov

Stay informed!

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