

CHHS Data Exchange Agreement

Business Use Case Proposal Instructions

Step 1 – Develop the Business Use Case Proposal

The data requesting department is the primary developer and submitter of the Business Use Case Proposal (BUCP). It is required that the data requesting department engage with the data providing department in the development of the BUCP. To help identify data assets available and the appropriate data stewards to engage in another CHHS department, contact the Department's Data Coordinator indicated below.

Step 2 – Submit the Proposal for Review

The data requesting department should formally submit the BUCP to the data providing department. Notify the AIO Governance Liaison by sending an email to CHHS@osi.ca.gov indicating that the BUCP has been submitted for review. Include the BUCP name and the contact information for the data requesting and data providing departments.

During the BUCP review, the providing department considers if the BUCP meets “minimum necessary”¹ and “consistent with collection purpose”² requirements.

Step 3 – Approve or Dispute the Proposal

BUCP approval should be granted by either the Chief Deputy Director or the Program Deputy Director of both the requesting and providing departments. Other signatories may also be required to approve the BUCP, as appropriate. Once the BUCP is approved, submit the signed BUCP and any associated attachments to the AIO Governance Liaison for filing.

If a BUCP is disputed, the providing department submits the BUCP dispute to the AIO Governance Liaison. The disputed BUCP enters into the CHHS governance process for resolution. The providing department should document the reason for the dispute. As part of the BUCP review, a department's interpretation of the laws under its jurisdiction will be presumptively correct but is not final.

¹ **Minimum Necessary:** Sharing only the minimum amount necessary to accomplish the purpose of the use or disclosure, whether shared internally or with external parties. The minimum necessary for departmental sharing is based on the department's need to know as related to the project, initiative, need, or legal mandates. For internal use of received data, the amount of information necessary to accomplish the purpose varies by job title, classification, and/or function. Use within a department of received data is related to the need to know based on job function or legal mandates.

² **Consistent with Collection Purpose:** The requested data elements for collection connect logically with the statement of intended purpose of the dataset.

Department Data Coordinator

The Department “Data Coordinator” role is identified in the [CHHS Open Data Handbook](#) as an executive-level sponsor for department data activities. The Department Data Coordinator serves as the single point of contact for the department for in-taking, routing, and stewarding the BUCP to the appropriate data steward or business area on behalf of the department.

The Department Data Coordinator helps to ensure success in the BUCP process, collaborating with other department data coordinators, clearing barriers, and mitigating the potential for disputes. The Data Subcommittee serves as a steering body and resource to department data coordinators to provide visibility, prioritization, and escalation for BUCPs.

This process will be monitored to support regular iteration and continual improvement. A baseline target for data exchanges is **three months** from concept development to physical data transfer. This baseline should be revisited regularly as processes are refined.

Departments that are receiving or sending multiple data requests may need to work with other CHHS departments to prioritize the various requests. In general, data requests from CHHS departments should take priority over data requests from third-parties, unless required by law or contractual obligation.

Organization	Name	Role	Email Address	Phone
CDA	Christin Hemann	Assistant Director	christin.hemann@aging.ca.gov	916-419-7504
CDPH	Jim Greene	Deputy Director, Health Informatics	jim.greene@cdph.ca.gov	916-440-7849
CSD	Rob McAndrews	Public Affairs Officer	rob.mcandrews@csd.ca.gov	916-576-7117
DCSS	Mary Ann Miller	Assistant Director	maryann.miller@dcss.ca.gov	916-464-3220
DDS	Jim Switzgable	Data Manager	jim.switzgable@dds.ca.gov	916-653-6979
DHCS	Linette Scott	Chief Medical Information Officer	linette.scott@dhcs.ca.gov	916-552-8830
DMHC	Naresh Baliga	Chief Information Officer	naresh.baliga@dmhc.ca.gov	916-322-8149
DOR	Armel Biscocho	Chief, Research	armel.biscocho@dor.ca.gov	916-558-5885
DOR	Jon Kirkham	Chief Information Officer	jon.kirkham@dor.ca.gov	916-650-0485
DSH	Gina Gonzales	Data Manager	gina.gonzales@dsh.ca.gov	916-651-3261
DSS	Adam Dondro	Assistant Director	adam.dondro@dss.ca.gov	916-657-2598
EMSA	Michelle Lund	Chief Information Officer	michelle.lund@emsa.ca.gov	916-431-3739
OSHPD	Scott Christman	Chief Information Officer	scott.christman@oshpd.ca.gov	916-326-3989