



CAQH Endpoint Directory Work Group

Session #1

October 15, 2020
2:00 – 4:00pm ET

Antitrust Guidelines

- Participation at this meeting and any subsequent meetings is voluntary.
- The sponsors are responsible for preparing a written agenda for the meeting and preparing written minutes for the meeting.
- The Chairperson of the meeting or the moderator of each discussion group will ensure that discussion follows the agenda.
- Participants will not discuss matters of a competitive nature, such as nonpublic information regarding pricing, products, or customers.
- Any participant who believes the meeting is covering an area of a competitive nature should raise the issue with the Chairperson or moderator, with counsel for any of the meeting's sponsors, or with the participant's own counsel.

The meeting will be recorded to ensure accurate documentation



Session Outline

Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none">▪ Antitrust guidelines, roll call▪ Review session objectives and agenda topics▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none">▪ Overview of CAQH▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none">▪ Overarching goal and scope▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none">▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none">▪ Summary of topics▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none">▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions.▪ Participants complete scheduling poll by Friday, 10/16/20 COB.▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

* All times are Eastern.

Session Objectives

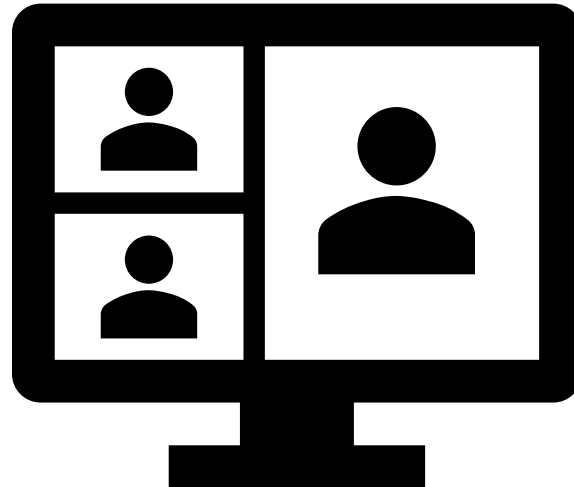
Level-set on CAQH Endpoint Directory Work Group charge and goals.

Align on scope of topics that require Work Group review and consensus.

Introductions

Primary member from each organization:

1. Introduce yourself: name, title and what you are looking forward to about participating in this CAQH Endpoint Directory Solution Work Group Effort.
2. Introduce your colleagues on the line: name, title.



Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none"> ▪ Antitrust guidelines, roll call ▪ Review session objectives and agenda topics ▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none"> ▪ Overview of CAQH ▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none"> ▪ Overarching goal and scope ▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none"> ▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none"> ▪ Summary of topics ▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus ▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none"> ▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions. ▪ Participants complete scheduling poll by Friday, 10/16/20 COB. ▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

* All times are Eastern.

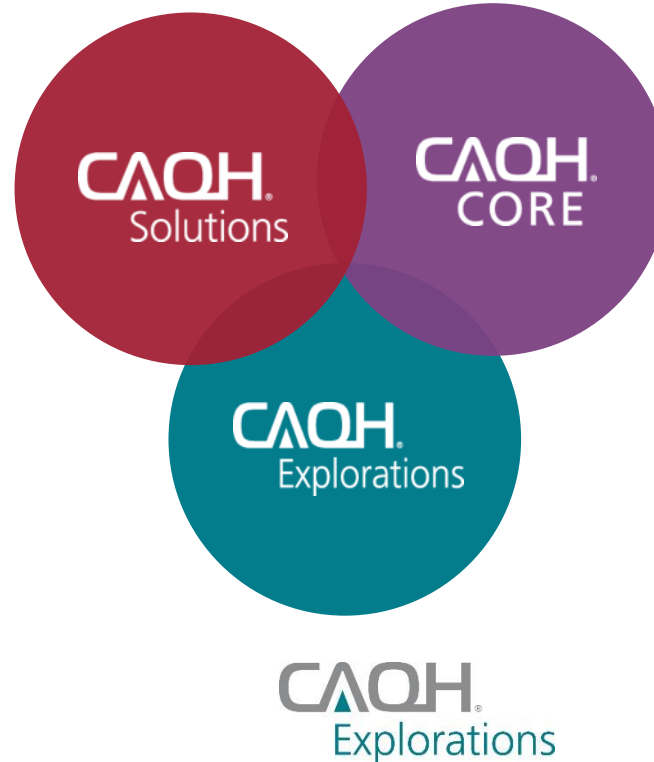
Overview of CAQH

CAQH initiatives are foundational to healthcare business processes



Trusted National Utilities that Streamline Healthcare Administration and Data Exchange:

- **CAQH ProView®** is the industry standard for provider data collection and distribution.
- **CAQH ProView for Groups** standardizes the credentialing process for delegated groups and health plans.
- **DirectAssure®** increases the accuracy of provider directories.
- **VeriFide™** streamlines credentialing by standardizing and automating primary source verification.
- **SanctionsTrack®** delivers comprehensive, multi-state information on provider licensure disciplinary actions.
- **EnrollHub®** reduces costly paper checks with provider enrollment for EFT and ERA.
- **COB Smart®** identifies health plan members with overlapping coverage.



Research and measurement arm of CAQH with an agenda to help demonstrate the impact of streamlined business practices in healthcare.

CAQH Explorations publishes the annual CAQH Index Report, which is the industry source for tracking and benchmarking health plan and provider adoption of fully electronic administrative transactions.



Industry-led creation and adoption of healthcare operating rules that support standards, accelerate interoperability and align administrative and clinical activities among providers, payers and consumers.

CAQH CORE has been designated by the Department of Health and Human Services (HHS) as the author of national operating rules for HIPAA-covered administrative transactions. Its operating rules improve the efficiency, accuracy and effectiveness of industry-driven business transactions.



CAQH works with a significant share of the healthcare industry including payer, provider, government, and vendor organizations

Engagement Highlights

- 730+ contracted health plans, including 82% of CMS-regulated plans, use CAQH solutions.
- 1.6M healthcare providers actively engaged, including over 72% of physicians.
- Other stakeholder engagement includes 43 solution vendors/ clearinghouses.
- CORE-certified and participating organizations represent 75% of covered lives.

CAQH Member Organizations



CAQH CORE Board Members



CAQH takes a consensus-based approach to launching new initiatives such as the endpoint directory

A national payer endpoint directory will require more than just a directory.

It will require governance, consensus building, trusted validation, adoption and a track record of scaling solutions for the vast majority of the healthcare industry.

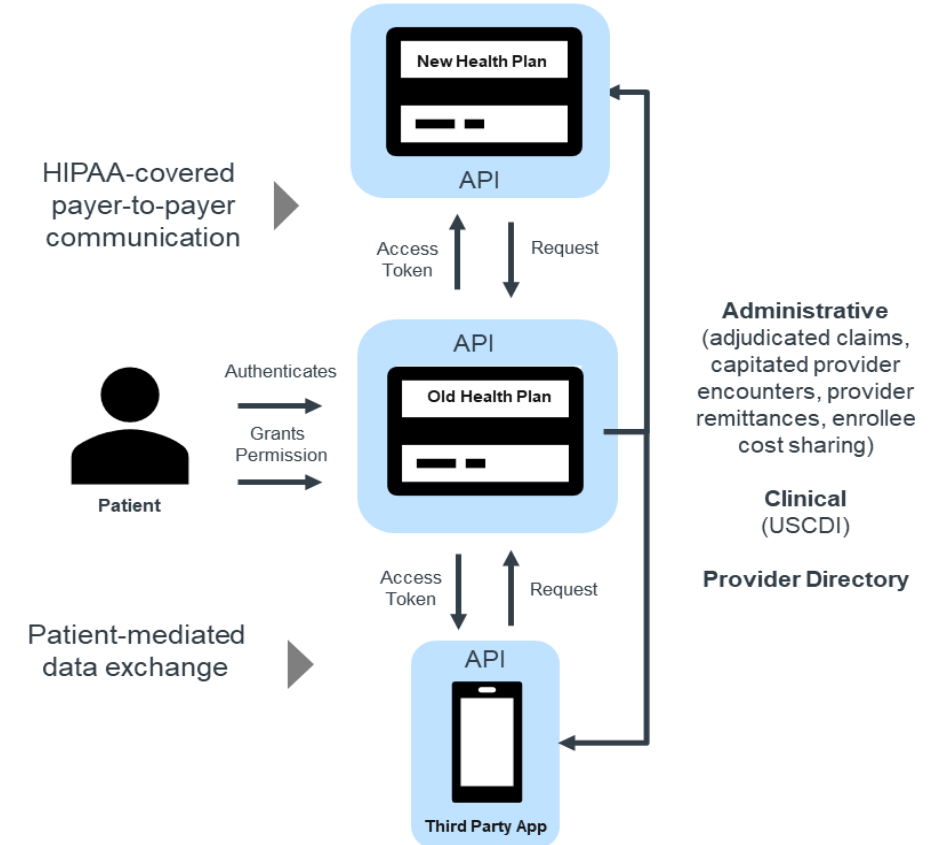
CAQH is a **non-profit** and one of the few **neutral trusted multi-stakeholder intermediaries** between payers, providers, vendors, and government entities.

CAQH Focus	Details
Governance	<ul style="list-style-type: none">▪ Multi-stakeholder boards and councils representing significant share of industry▪ Consensus-driven initiatives
Working Groups	<ul style="list-style-type: none">▪ Industry work groups convene to align on initiative scope and approach
Solution Development	<ul style="list-style-type: none">▪ Cost sharing across multiple organizations▪ One-to-many transaction model▪ Best of breed technology vendors▪ Solutions built on trusted validation
Rules and Standards Alignment & Validation	<ul style="list-style-type: none">▪ Collaborative development of business operating rules that support standards▪ Test, iterate, educate, certify and drive adoption: facilitate trusted connections

Background on CAQH Endpoint Directory Solution & Roadmap

Background

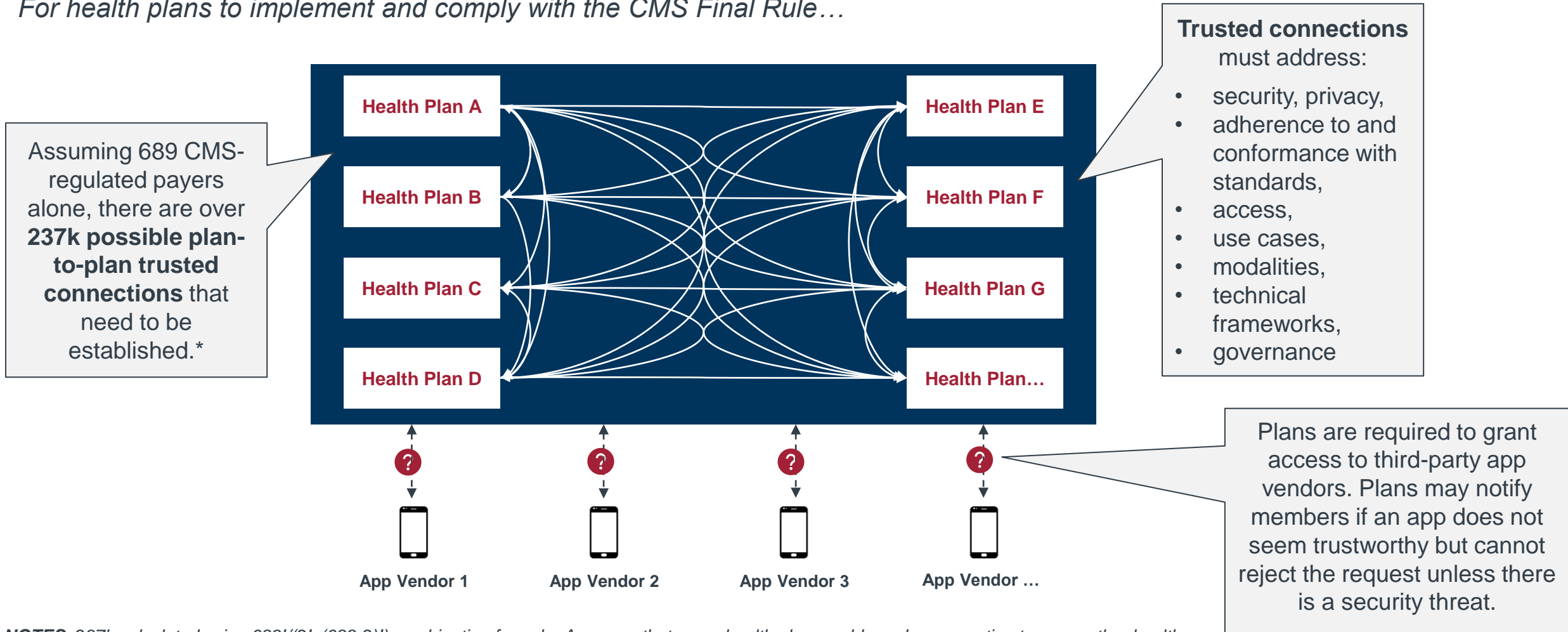
- Centers for Medicare and Medicaid Services released the Final Rule (“CMS Final Rule”) on Interoperability and Patient Access, requiring that CMS-regulated plans:
 - ✓ Implement and maintain openly-published **HL7® FHIR® -based APIs in order to provide patients access** to their health information.
 - ✓ **Permits access to data by third-party applications**, with approval from patient (effective Jan 1, 2021; enforceable Jul 1, 2021).
 - ✓ Support electronic **exchange of data for care coordination as patients move between plans** (effective and enforceable Jan 1, 2022).
 - ✓ **Provide information to their members to help them protect the privacy and security of their health information** including information on third party apps regarding privacy and security practices and secondary data use.
- ONC’s FHIR at Scale Task Force (FAST), Da Vinci, and other organizations have identified **endpoint directories as a critical solution to overcome scale barriers**.
- Drawing on solution concepts from the ONC FAST foundation, CAQH developed a prototype to capture feedback and understand roadmap priorities from health plans and experts from ONC FAST, Da Vinci, CARIN, and others.



Industry feedback during CAQH’s proof-of-concept period indicated that: (1) a utility that publishes payer FHIR endpoints and third-party apps would close an industry gap, and (2) CAQH is well positioned to develop and maintain the utility.

Situation: Unwieldy volume of one-off trusted connections required for plan-to-plan and app vendor-to-plan interaction

For health plans to implement and comply with the CMS Final Rule...

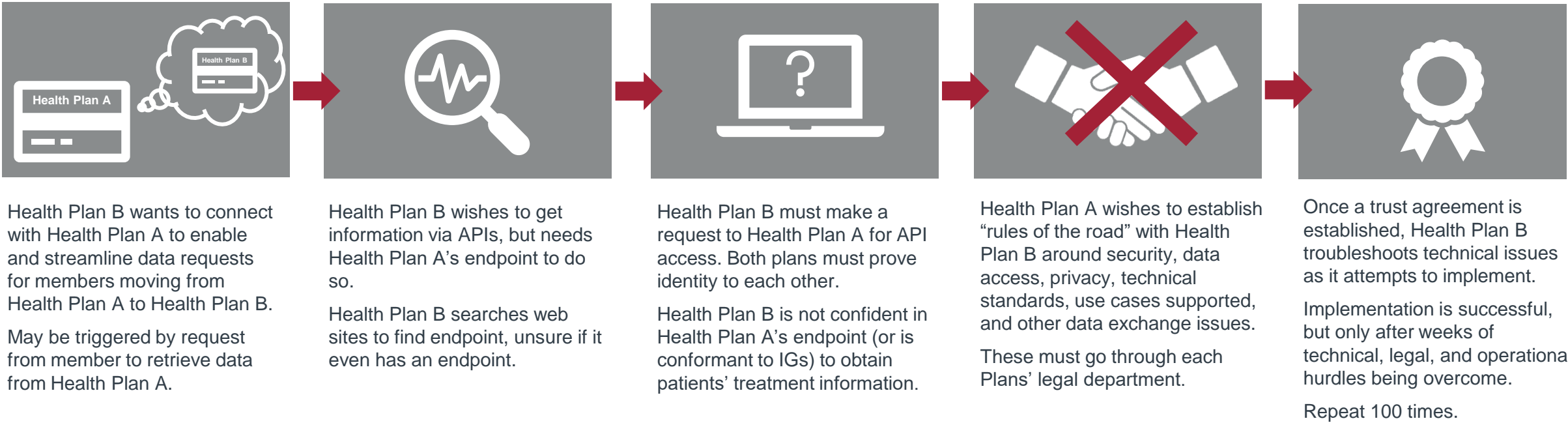


NOTES: 237k calculated using $689!/(2! \times (689-2)!)$ combination formula. Assumes that every health plan would need a connection to every other health plan. This connection count excludes endpoint discovery that may have to occur for payer-provider and payer-patient connections that may occur.

Challenge #1: Inquiring on an organization-by-organization basis on the location of payers' FHIR endpoints

If health plans had to comply with the Final Rule today, the endpoint discovery and connection process would be inefficient, uncertain, and present a barrier to endpoint usage and interoperability...

Example: Plan-to-Plan



Similar challenges apply to third-party app developers that need to find payer endpoint information on behalf of members.

Challenge #2: Giving access to payer APIs to third party apps will be burdensome



Authenticating Vendors

- Checking business credentials of hundreds of applications
- Verification of privacy and data protection policies



Education and Training

- Ensuring that vendor understands and is proficient with FHIR standards and security
- Training and educating vendor on Certification and Testing needs and process



Testing and Certification

- Ensuring that application follows the laid down security protocols
- Test and Certify applications for various FHIR use-cases
- Ensuring that applications do not mislead members



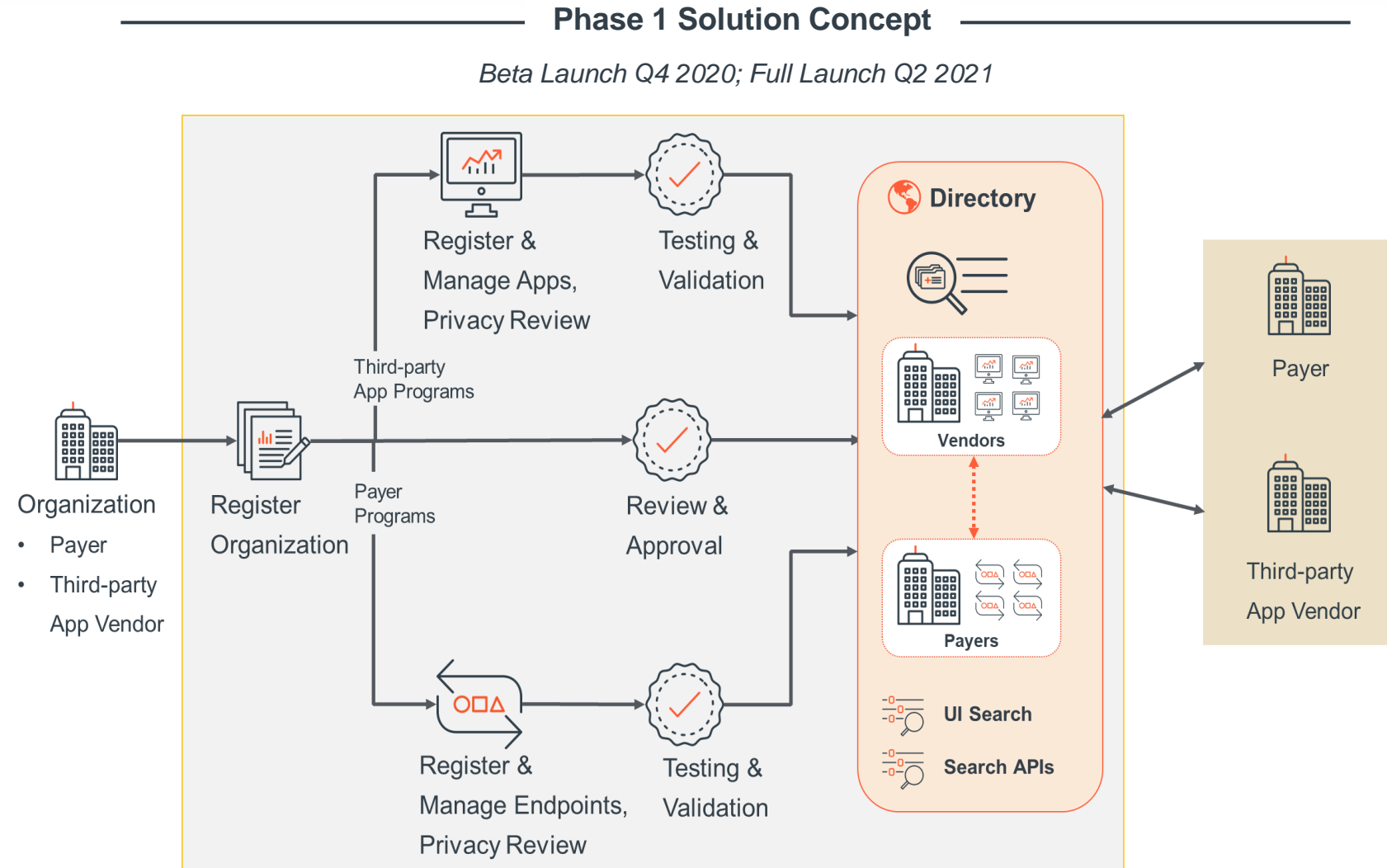
Operational Hurdles

- Testing and Certification of applications at scale
- Keeping administrative costs low, while meeting members' expectations in terms of applications of their choice

Solution Concept: A National Utility for Payer Endpoints & Third-party App Registry

A national source of truth for validated payer endpoints and third-party apps that:

- Allows payers to **share information about endpoints**, including capability statement imports. Simplifies, automates manual processes.
- Allows payers and third-party apps to **query payer endpoints** for multiple use cases.
- **Validates identity** of payer and third-party app participants.
- **Facilitates connection request** between parties.
- **Confirms privacy and security attestations** and/or privacy policy, data use agreements.
- **Ensures conformance testing and validation** of FHIR endpoints and ability to work with endpoints.
- Allows **third-party apps to upload information about themselves** to make available to payers.



Items that are out of scope; items that could be potential for Phase 2 scope

Out of Scope

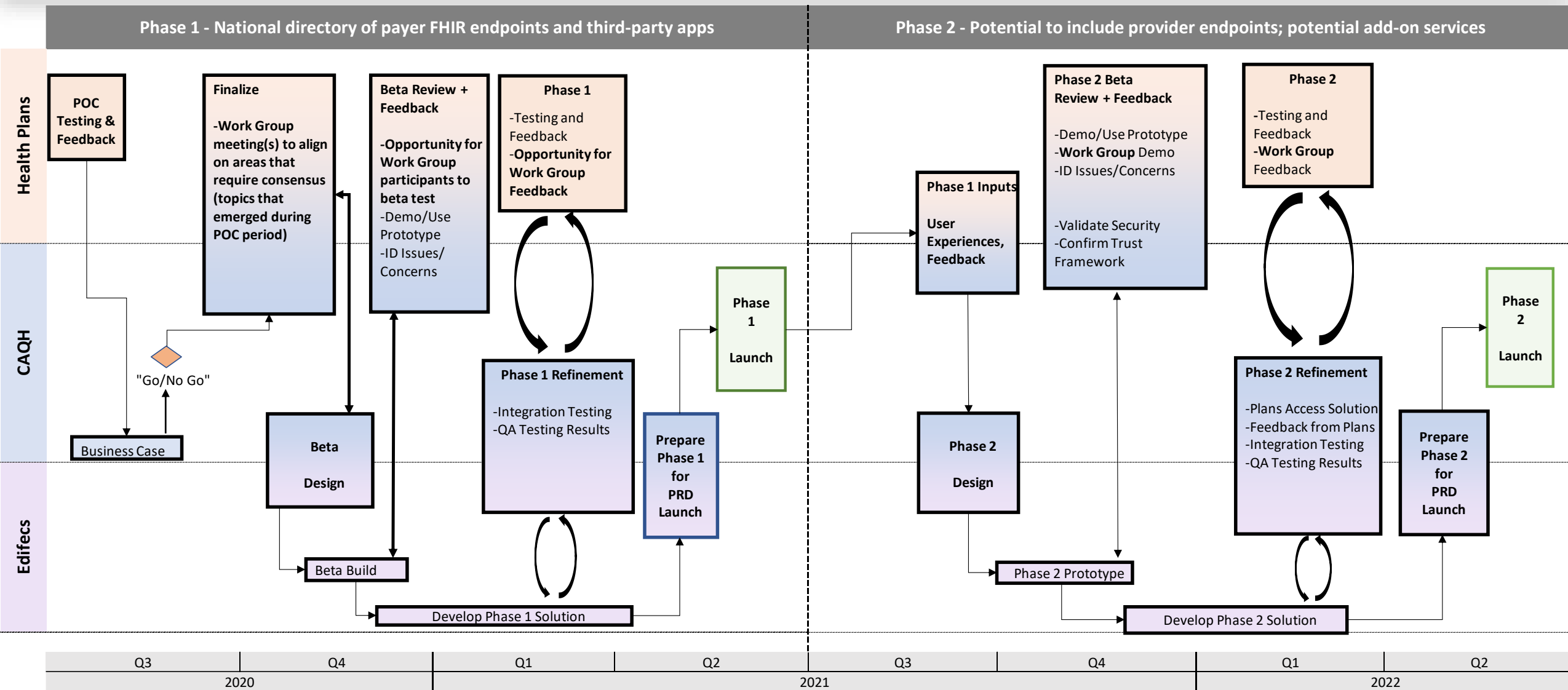
- Obtaining patient authorization/ consent
- Issuing of client IDs and secret keys
- Routing capabilities
- Conduit of patient data between payers or between payers and third-party apps

Potential Phase 2 Scope

- Phase 2, which would beta launch Q4 2021 and fully launch Q2 2022, could include the following:
 - Provider endpoints
 - A more formalized trust framework
 - Automated client-server request/ credential check
 - Potential support for UDAP Dynamic Client Registration
 - Add-on optional services to support accurate patient matching and identification of prior coverage

Roadmap

Beta Launch Q4 2020, Phase 1 Full Launch Q2 2021



Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none"> ▪ Antitrust guidelines, roll call ▪ Review session objectives and agenda topics ▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none"> ▪ Overview of CAQH ▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none"> ▪ Overarching goal and scope ▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none"> ▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none"> ▪ Summary of topics ▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus ▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none"> ▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions. ▪ Participants complete scheduling poll by Friday, 10/16/20 COB. ▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

* All times are Eastern.

CAQH Endpoint Directory Work Group Charge

Work Group Scope

- The CAQH Endpoint Directory Work Group, comprised of a diverse set of health plans, is convening to address items that could benefit from collaborative discussion. During the proof-of-concept period, feedback emerged that the below topics may require Work Group consensus and decision.
 - Privacy policy, security policy, and data use review and attestation.
 - Health plan identifiers, endpoint organizational hierarchy, and search parameters.
 - Breadth and depth of conformance testing and validation; re-validation cadence.
 - Directory participation requirements: “gates”/ criteria for posting information from third-party apps and health plans to the directory.
- Over the course of four sessions, the Work Group will provide input on these areas in order to inform the beta solution.
- Following today’s session, Work Group participants will complete a Straw Poll to provide additional feedback; areas with low levels of agreement will be prioritized for consensus discussions in subsequent sessions.

CAQH Endpoint Directory Work Group Charge

Participant Expectations

- Attend and actively participate in all four Work Group sessions.
- Each organization may have multiple participants, but please identify one primary member.
- Organizations may only submit one Straw Poll response.
- In between sessions, complete straw polls as applicable. Consult with additional SMEs within your organization to provide feedback, as needed.
- If you have a conflict, please identify an alternate to sit-in, and notify CAQH staff.

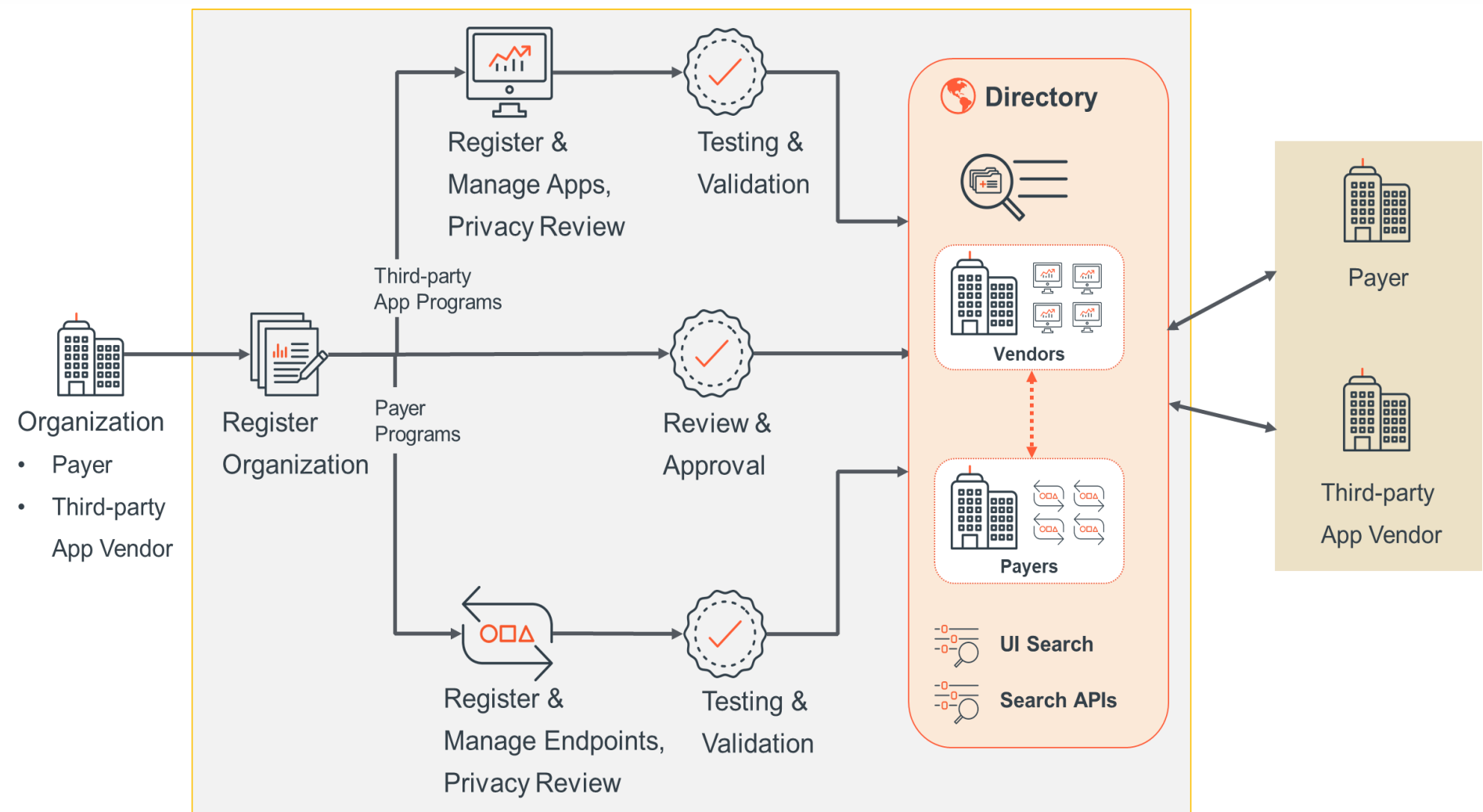
Time Commitment

- Four sessions from **mid-October to December 2020**. Sessions are two hours long.
- Completing straw polls/ surveys, obtaining SME guidance from within your organization, etc. will take additional time in between sessions.
- Work Group organizations are also welcome to participate in beta testing.

Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none"> ▪ Antitrust guidelines, roll call ▪ Review session objectives and agenda topics ▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none"> ▪ Overview of CAQH ▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none"> ▪ Overarching goal and scope ▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none"> ▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none"> ▪ Summary of topics ▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus ▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none"> ▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions. ▪ Participants complete scheduling poll by Friday, 10/16/20 COB. ▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

* All times are Eastern.

Focus of Demo/Wireframe Walkthrough: Phase 1 Solution Concepts



Proof-of-Concept Demo

Wireframe (1 of 3)
Registering a Third-Party App

In Progress 9 Jan 2019 4:34 PM Jessica Version 1.1.0

Overview

Application Profile

Test Validations

Application Information

Questionnaire

Attestation Information

80% Complete

Edit

Information in this section is visible to Edifecs, and will be visible to other organizations after publishing to the Directory.



AskSophie

Healthplan Inc. Version 1.1.0



[View Application](#)

[Terms & Conditions](#)

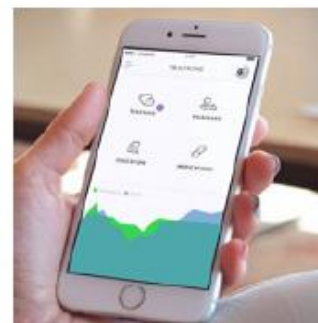
[Privacy Policy](#)

[Contact](#)

About

Make shopping for Medicare plans easier by using your previous doctors, [harmacies, and Medicare prescription history to inform and expedite your Medicare health plan shopping experience with AskSophie and expedite your Medicaid health plan make shopping for Medicare plans easier by using your...

Preview



2/3 App Main UI

Learn More

Make shopping for Medicare plans easier by using your previous doctors, [harmacies, and Medicare prescription history to inform and expedite your Medicare health plan shopping experience with AskSophie and expedite your Medicaid health plan make shopping for Medicare plans easier by using your...

Information in this section is visible to Edifecs.

1. Is your application released for public use?

No

2. How do you intend your user to use your application?

As a consulting tool for health related questions.

3. How many users you think your application will attract?

1,000 - 5,000

4. Is your privacy policy based on industry best practices?

Yes

5. Is your privacy document prominently and publicly accessible?

Yes

6. Is your privacy document easy to read, especially from the perspective of end-user?

Yes

7. How did you determine that your Privacy Policy and Terms of Service documents are easy to read from end-user perspective? Please share the study conducted with relevant documentations.

We tested it with several targeted users.

[User feedback questionnaire.xml](#)

8. Does your privacy policy specify your company data collection practice, including any use and sharing of de-identified, anonymized and pseudonymized data?

Yes

9. Some data, even if it has been anonymized, can still be used to identify people with specific medical conditions, etc. Are you doing enough to explain these risks in your privacy policy?

Wireframe (2 of 3)

Testing a Third-Party App (to demonstrate ability to integrate with Payer APIs)



6 Endpoints Found!

Patient Access Endpoint

✓ Coverage

✓ Coverage - II



○ Explanation of Benefits

✗ Appointment

⚠ Enrollment Request

Patient Access Endpoint

● In Progress ⌚ 9 Jan 2019 4:34 PM 👤 Jessica

Submit for Review



Endpoint Profile

Test Validations

22
Total○ 8
Not Started● 10
In Progress⚠ 1
Under Review✓ 3
Passed✗ 0
Failed

Test Scenarios

+ Add

18 Scenario(s) Found!



▼ Connectivity Tests (6)

FHIR R4

✓ Connect with ClientID & Secret Key
Executions : 4● OAuth with Scope
Executions : 1● OAuth without Scope
Executions : 1○ OAuth with invalid Scope
Executions : 0✓ Request Refresh Token
Executions : 3✓ Invalid Endpoint URL
Executions : 1

> Patient Access API Tests (8)

FHIR R4

> Provider Directory Tests (5)

FHIR R2

Connect with Client ID & Secret Key

🗑 Remove Scenario

✓ Passed ⌚ 10 Jan 2020 11:59PM 👤 Jessica

Test the connectivity using the Client ID and Secret Key assigned for your application

^ Steps (2)

▼ Executions (4)

* Create 🔄 Submit 🗑 Delete

<input type="checkbox"/>	Execution Run Name	Status	Modified On	Modif..
<input type="checkbox"/>	01Jan20_434PM	● Pending Submission	09 Jan 2020 4:08 PM	Kathl...
<input type="checkbox"/>	BetaTest_1	✗ Fail	09 Jan 2020 5:09 PM	Kathl...
<input type="checkbox"/>	03Jan20_509PM	✓ Pass	10 Jan 2020 10:32 AM	Kathl...
<input type="checkbox"/>	BetaTest_2	✓ Pass	09 Jan 2020 4:08 PM	Kathl...

Wireframes (Part 3 of 3):

Payer Endpoint and Third-Party App Discovery

Supported Platforms

All

Application Name/Description



Publishing Organization Name



40 Applications Found!

Sort By Latest Published ▾



AskSophie

Healthplan Inc

Version 1.1.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



BWell

Touchstone

Version 4.2.3



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



1up Health

Healthplan Inc

Version 1.1.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



All Well

Aetna

Version 10.2.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



Achievement Logs

Touchstone

Version 2.2.2



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



Docspera

Healthplan Inc

Version 2.3.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



App Name

Org Name

Version 1.1.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



App Name

Org Name

Version 1.1.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



App Name

Org Name

Version 1.1.0



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud ...



App Name



App Name



App Name



Organization Type

All

Organization Name/Description



27 Organizations Found!

Sort By Latest Published ▾

**Healthplan Inc**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 6 Endpoints

**Touchstone**

Connected Health is transforming the way consumers interact with the healthcare industry by providing access to full ...

3 Apps 12 Endpoints

**Aetna**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

2 Apps 20 Endpoints

**Premiera Blue Cross**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

2 Apps 18 Endpoints

**Organization Name**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 10 Endpoints

**Organization Name**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 10 Endpoints

**Organization Name**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 10 Endpoints

**Organization Name**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 10 Endpoints

**Organization Name**

Large healthplan catering to North America with 50 million + members. Offers plans for Medicare, Medicaid an...

0 Apps 10 Endpoints

**Organization Name****Organization Name****Organization Name**

Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none"> ▪ Antitrust guidelines, roll call ▪ Review session objectives and agenda topics ▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none"> ▪ Overview of CAQH ▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none"> ▪ Overarching goal and scope ▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none"> ▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none"> ▪ Summary of topics ▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus ▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none"> ▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions. ▪ Participants complete scheduling poll by Friday, 10/16/20 COB. ▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

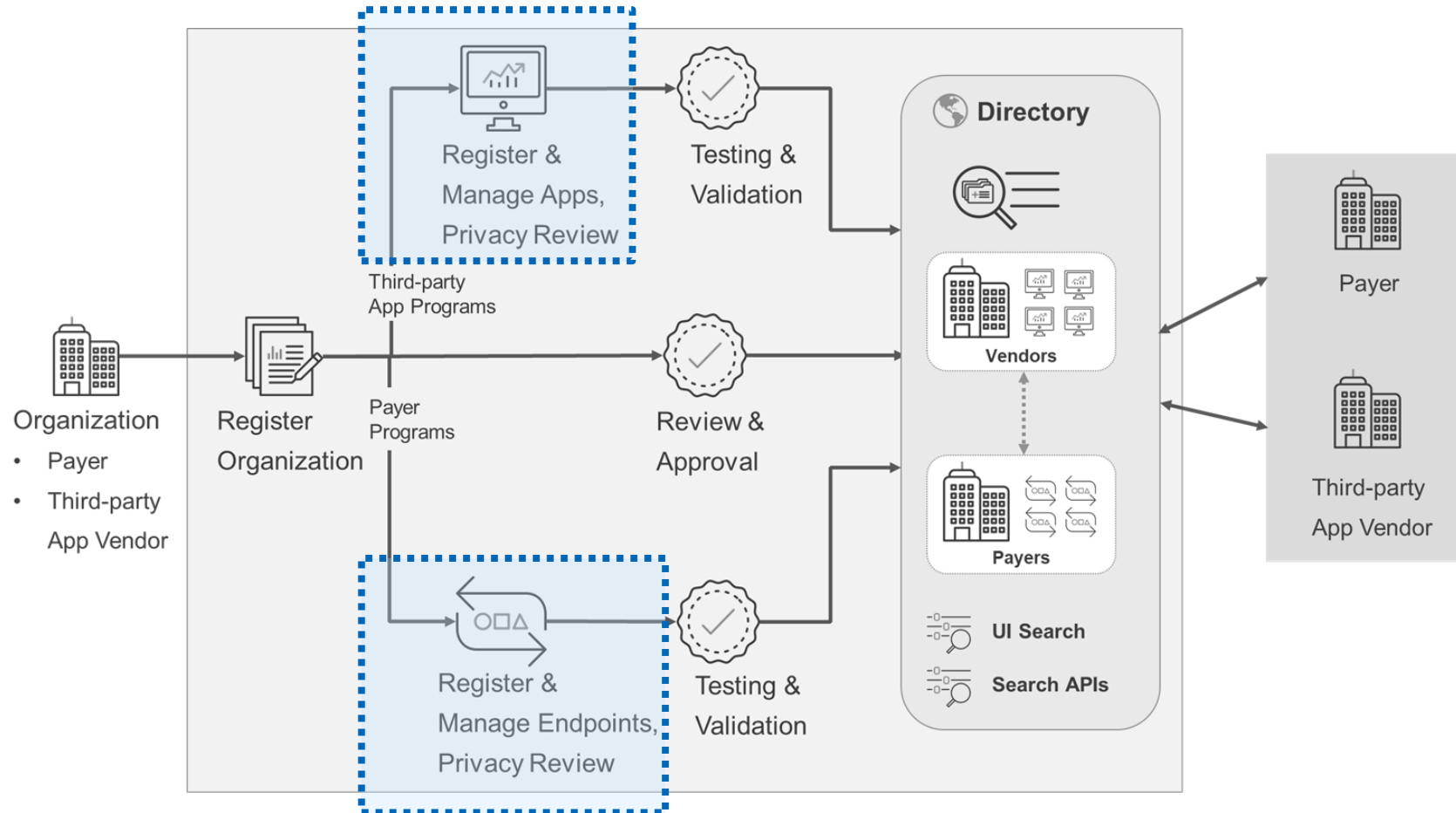
* All times are Eastern.

Overview of CAQH Endpoint Directory Work Group Topics

During CAQH's proof-of-concept period, feedback emerged that the below topics may require Work Group consensus and decision. Following today's session, Work Group participants will complete a Straw Poll to provide additional feedback; **areas with low levels of agreement will be prioritized for consensus discussion in subsequent sessions.** The Work Group will provide input to these areas in order to inform the beta solution.

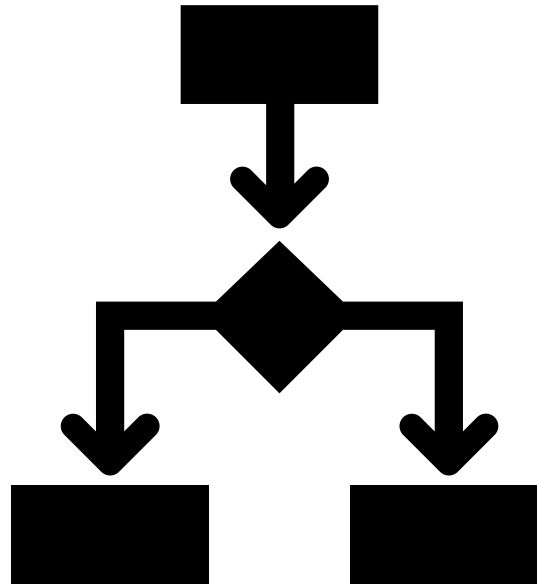
#	Topic	Representative High-level Questions – <i>not exhaustive</i>
1	Privacy policy, security policy, and data use review and attestation.	<ul style="list-style-type: none">▪ Criteria & scoring: Which policy documents should be required for upload? Is it possible to align on a standard questionnaire and scoring method? In addition to privacy, what security questions are critical to ask?▪ Timing & revalidation: Can these requirements occur at time of endpoint/app registration? Should requestors be prompted to revalidate their attestations upon connection request?
2	Health plan identifiers, endpoint organizational hierarchy, and search parameters.	<ul style="list-style-type: none">▪ Org identifiers: Which IDs are critical to be able to accommodate in the directory? Do we need IDs both at organization level as well as endpoint level?▪ Hierarchy & search terms: What data fields do we need to ensure that we capture both the plans that organize at a high organizational level and then route, vs. plans that have different IDs and endpoints for each LOB, geographic region, market, etc.?
3	Breadth and depth of conformance testing and validation; re-validation cadence.	<ul style="list-style-type: none">▪ Criteria: What level of conformance testing should be offered? Should some aspects be required vs. optional?▪ Revalidation: How often should entities be required to go through testing/ at what cadence should revalidation occur?▪ Seal of approval: Should there be a seal of approval shown in the directory if an organization has gone through conformance testing and validation?
4	Criteria for posting information from third-party apps and health plans to the directory.	<ul style="list-style-type: none">▪ Criteria: What is the “gate” to be listed in the directory? Completing privacy attestations, etc., or that plus conformance testing and validation?

CAQH Endpoint Directory Work Group Topics: Today's Focus



Today's focus: questions pertaining to privacy reviews, criteria, sequencing

Today's focus: questions pertaining to privacy reviews, criteria, sequencing



Topic	Time*	Details
1. Welcome	2:00 – 2:20	<ul style="list-style-type: none"> ▪ Antitrust guidelines, roll call ▪ Review session objectives and agenda topics ▪ Introductions
2. Background	2:20 – 2:30	<ul style="list-style-type: none"> ▪ Overview of CAQH ▪ Background on CAQH Endpoint Directory solution and roadmap
3. Work Group Charge	2:30 – 2:35	<ul style="list-style-type: none"> ▪ Overarching goal and scope ▪ Participant expectations and time commitment
4. Solution Demo	2:35 – 3:00	<ul style="list-style-type: none"> ▪ Demo/ wireframe walkthrough
5. Topics for Consensus	3:00 – 3:50	<ul style="list-style-type: none"> ▪ Summary of topics ▪ Workflow diagrams for third-party app-to-payer and payer-to-payer, aligning to topics for consensus ▪ Discussion
6. Next Steps	3:50 – 4:00	<ul style="list-style-type: none"> ▪ Participants complete Straw Poll, due Tuesday, 11/03/20 COB. Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions. ▪ Participants complete scheduling poll by Friday, 10/16/20 COB. ▪ Once participants complete scheduling poll, CAQH send calendar invites for remaining Work Group sessions.

* All times are Eastern.

Next Steps: CAQH Endpoint Directory Work Group

1. **Work Group participants complete Straw Poll, due Tuesday, 11/03/20 COB.** *Straw poll goal: uncover areas of agreement versus areas that require further discussion and consensus during subsequent Work Group sessions.*
2. **Work Group participants complete scheduling poll by tomorrow, Friday 10/16/20 COB:** <https://doodle.com/poll/twugv9nmbv9dda83>. *Note: When completing the poll, please indicate ALL windows that you are available; CAQH will choose the most popular date/time options to schedule the remaining three sessions and send out invites.*
3. **CAQH send calendar invites for remaining Work Group sessions** (dependent on item #2 above). *Note: the remaining sessions will take place in November and December.*

APPENDIX

Today's Call Documents

Document Name

CAQH Endpoint Directory Work Group_Session 1 Deck_20201015

CAQH Staff	Email Address
April Todd <i>Senior Vice President, CORE & Explorations</i>	atodd@caqh.org
Ron Urwongse <i>Director of Strategy and Innovation</i>	rurwongse@caqh.org
Rachel Goldstein <i>Senior Manager, CORE</i>	rgoldstein@caqh.org
Dasia Rogers <i>Program Assistant, Solutions – Technology & Product</i>	drogers@caqh.org

CAQH Endpoint Directory Work Group Roster (as of 10/15/20)

Health Plan	Participant Name
Aetna	Hari Viswanathan
	Shivani Patel
Anthem	Brandon Raab
	Christol Green
	Kenneth Williams
	Sam Sander
	Sarah Young
BCBS FL	Amit Shah
	Court Collins
	Heather Kennedy
BCBS MA	TBD

Health Plan	Participant Name
BCBS NC	Lynda McMillin
	Prabhat Bali
CareFirst	Julie Billman
Cigna	Patrick Haren
	Paul Oates
Horizon	Siobhan Matsagas
Humana	Patrick Murta
Kaiser	Bryan Matsuura
	Kevin Isbell
	Radha Murakami
United	Nick Radov
	Sagran Moodley



“ We build innovative healthcare solutions that harness data into meaningful transactions, reducing operating risks and scaling value-based initiatives, to meet the specific needs of our clients.

- 24 years developing software solutions to streamline the exchange and processing of healthcare information.
- Over 350 global clients who trust our solutions to enhance their productivity and operational efficiency.
- Single framework to simplify Electronic Data Interchange (EDI) and ensures conformance with changing standards.
 - Facilitate ongoing compliance, format specification and data integrity assurance.
 - Drive down administrative costs elimination of redundant, labor-intensive processing.

CAQH & CMS Certification Programs

- Edifecs offers free certification testing portal has helped 190+ healthcare organization obtain CORE certifications.
- CMS chose the Edifecs XEngine to test business transactions for compliance for the ASETT program.