CAPH — CALIFORNIA ASSOCIATION of PUBLIC HOSPITALS AND HEALTH SYSTEMS

SNI — CALIFORNIA HEALTH CARE SAFETY NET INSTITUTE

CHEAC — Improving the Health of all Californians

CSAC

cbhda — COUNTY BEHAVIORAL HEALTH DIRECTORS ASSOCIATION — CALIFORNIA

California Health Care Foundation

Whole Person Care Data Sharing Convening
May 22, 2018, 9:30 - 4:00pm
Hilton Hotel - Oakland Airport

A G E N D A

Participants will…

✓ Increase their knowledge of what data can be shared under state and federal law.

✓ Identify new opportunities and technical approaches to share data across WPC partners.

✓ Learn strategies to address organization dynamics and develop a stronger culture of data sharing.

8:30 **_Coffee and Networking_**

9:30 **Welcome and Opening Remarks**
- ◊ California Association of Public Health Systems / California Health Care Safety Net Institute (CAPH/SNI)
- ◊ County Health Executives Association of California (CHEAC)
- ◊ California State Association of Counties (CSAC)
- ◊ County Behavioral Health Directors Association of California (CBHDA)
- ◊ California Health Care Foundation (CHCF)

9:40 **Navigating Federal and State Data Sharing Regulations (Part A)**
- ◊ Anil Shankar, Senior Counsel, Foley and Lardner LLP
- ◊ Adam Hepworth, Associate, Foley and Lardner LLP
- ◊ Laura Rosas, Ethics and Compliance Officer, Santa Clara Valley Health System

Mr. Shankar, Mr. Hepworth, and Ms. Rosas will address legal considerations for sharing information for Whole Person Care, including an overview of applicable laws such as 42 CFR Part 2. The speakers will discuss key decisions for Pilots and provide tools and recommendations for evaluating permissible data sharing.

11:00 **Navigating Federal and State Data Sharing Regulations (Part B)**

Pilot teams will work through case studies that present common barriers to WPC data sharing (e.g., protecting SUD data, accessing jail data) and apply lessons from the previous session to determine how data can be appropriately shared. Pilots will also have the option to discuss an existing local challenge with data sharing.

12:15 **_Lunch_**

To encourage networking, tables will be arranged by role (e.g., WPC Leads, Data Leads, BH/SUD Leads, Privacy Officers/Legal Counsel)

1:15   WPC Technical Models Assessment – Survey Results Overview
  ◊   Mark Elson, Principal, Intrepid Ascent
  ◊   John Weir, Senior Consultant, Intrepid Ascent

Dr. Elson and Mr. Weir will summarize findings from a recent CHCF survey, including an overview of IT models being pursued by WPC Pilots.

1:25   *Transition to Breakout Sessions*

1:30   Technology and Workflow Design for Appropriate Data Sharing (Breakout Sessions)
  ◊   Mark Elson, Principal, Intrepid Ascent
  ◊   Alex Horowitz, Principal Technology Strategist, Intrepid Ascent
  ◊   Karen Boruff, Managing Consultant, Health IT Policy, Intrepid Ascent
  ◊   John Weir, Senior Consultant, Intrepid Ascent

Shared Care Planning
Every WPC enrollee must have a comprehensive shared care plan within 30 days of enrollment. Participants will discuss how their Pilots are meeting this requirement in terms of care team models and workflows, care management technology, and user access levels.

Patient Consent Management
Pilots are designing new forms and processes to authorize sharing of health information between WPC partners. Participants will discuss different approaches to the consent process, including electronic storage and access to consent status across WPC partners.

WPC and Health Information Exchange (HIE)
Intrepid Ascent will present an overview of current HIE models, sharing examples from Pilots in Marin, Sacramento, and San Joaquin. Participants will have the opportunity to ask questions and discuss their Pilot's approach to HIE with peers.

2:30   *Snack Break*

2:40   Regroup

Pilot teams will reconvene, share what they learned in the breakout sessions, and identify specific action steps to carry out after the meeting.

2:55   Pilot Spotlight: Success Stories in Teamwork and Data Integration
  ◊   Mark Elson, Principal, Intrepid Ascent
  ◊   Jennifer Tong, Chief Medical Informatics Officer, Contra Costa Health Services
  ◊   Geoff Smith, Program Manager, Placer County Health and Human Services

Dr. Elson will present strategies to strengthen collaboration between program leaders, legal and compliance teams, technology staff, and front-line service providers.

Dr. Tong and Mr. Smith will describe their successes addressing misunderstandings about data sharing, and improving communication and data flow between WPC partners.

4:00   *Adjourn*