

**CAQH Committee on Operating Rules for Information Exchange (CORE)
Review Work Group Call #1
Call Summary: Thursday, September 14, 2023, 2:00-3:30 pm ET**

This document contains:

- Agenda items and key discussion points.
- Decisions and actions to be taken.
- Next steps.
- Call Attendance.

Agenda Item	Key Discussion Points	Decisions and Actions
1. Welcome, Antitrust Guidelines, and Participant Dashboard (Doc #1 Slides 1-3)	<ul style="list-style-type: none"> • Katie Gilfillan (HFMA) opened the call and welcomed everyone to the group. Ms. Gilfillan reviewed the antitrust guidelines, administrative items, and agenda items. • Kaitlin Powers (CAQH) conducted roll call. <ul style="list-style-type: none"> ○ [See call participant roster at the end of this meeting summary to view call attendees and affiliated organizations]. 	<i>Discussion</i>
2. Level Set (Doc #1 Slides 4-12)	<ul style="list-style-type: none"> • Patricia Wijtyk (Cognizant) gave a high-level overview of CORE's mission, vision, and industry role, then discussed the approach and progression of CORE's operating rule development and voting process. Additionally, Ms. Wijtyk: <ul style="list-style-type: none"> ○ Reviewed the scope, goals, and timelines for the Review Work Group (RWG). ○ Introduced herself as a RWG co-chair and passed the call to the other co-chairs for them to introduce themselves. They include Ms. Gilfillan and Donna Campbell (HCSC). ○ Provided a breakdown of RWG participants, participant expectations and responsibilities for RWG calls, and any additional work, such as straw polling and call preparation. 	<i>Discussion</i>
3. Scope (Doc #1 Slides 13-20)	<ul style="list-style-type: none"> • Michael Phillips (CAQH) provided an orientation of the updated and new operating rules that the RWG will be tasked to review and provide feedback for in Straw Polls and the RWG Ballot. These include draft operating rules for Value-based Payments (VBP), Health Care Claims, and EFT & ERA Enrollment Data. Supporting this review: <ul style="list-style-type: none"> ○ Mr. Phillips reviewed the progression of VBP rule development and key focus areas for the draft VBP operating rules. ○ Pete Benzinger (CAQH) reviewed the progression of Health Care Claims rule development and key focus areas for the claims data content operating rules. ○ Ms. Powers reviewed the progression of EFT & ERA Enrollment Data rule maintenance and the five opportunity areas currently under consideration by the EFT & ERA Enrollment Data Task Group (EDTG) for a rule update. 	<i>Discussion</i>
4. Draft Value-based Payment Operating Rules (Doc #1 Slides 21-38)	<ul style="list-style-type: none"> • Mr. Phillips provided an overview of VBP opportunity areas, newly drafted operating rules and resources that support VBP methodologies. This review included the following draft rules and resources: <ul style="list-style-type: none"> ○ NEW Benefit Enrollment and Maintenance Data Content Rule ○ UPDATED Attributed Patient Roster Data Content Rule ○ UPDATED Benefit Enrollment and Maintenance and Attributed Patient Roster Infrastructure Rules ○ NEW CORE Framework for Semantic Interoperability in VBP • The benefits of each draft rule were briefly outlined highlighting their role in standardizing socio-demographic data collection and exchange and unifying definitions for concepts and terms in the industry. 	<i>Discussion</i>
5. Next Steps	<ul style="list-style-type: none"> • Ms. Gilfillan reviewed the next steps and expressed the importance of straw poll completion in guiding 	<u>Action required:</u>

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(Doc #1 Slides 29-30)	<p>the discussions and operating rule refinement. Straw Poll #1 will be distributed on September, 25th. The next RWG call is at 2:00 PM EST on Thursday, October 19th.</p> <ul style="list-style-type: none"> ○ CORE RWG Co-Chairs & Staff: <ul style="list-style-type: none"> • Distribute Straw Poll #1 to participants by Monday, 09/25/2023, end of day. • Draft a call summary for today's call and make it available on the CORE Participant Dashboard for participants to review. • Analyze the results of Straw Poll #1 in preparation for Call #2 on Thursday, October 19th. ○ RWG Participating Organizations: <ul style="list-style-type: none"> • Complete Straw Poll #1 by Friday, October, 13th EOD. • Participate in Call #2 on Thursday, October 19th from 2:00-3:30 PM EST. 	Agreed to Next Steps.

Call Documentation
Doc 1: RWG Call 1 Deck 09.14.23.pdf

CORE Contact Information

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Pete Benziger
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Kaitlin Powers
Sr. Associate, CORE
kpowers@caqh.org

Organization	Name	Attendance
Aetna	Marianne Davidson	Y
Aetna	Rose Hodges	
Aetna	Heather Morgan	
Aetna	Kellene Parthemore	Y
Aetna	Mark Rabuffo	

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Organization	Name	Attendance
Aetna	Mark Warren	
AHA	Terrence Cunningham	Y
AHA	Andrea Preisler	Y
AHCCCS	Errallyn Rodriguez	Y
AMA	Erica Martin	Y
AMA	Heather McComas	Y
AMA	Nancy Spector	
Ameritas Life Insurance Corp.	Noah Mastel	
Aspen Dental	Margaret Schuler	Y
athenahealth	Emidio Depina	Y
Availity	Tonya Moffitt	Y
BCBS Michigan	Cindy Monarch	
BCBS NC	Heather Sammons	Y
BlueCross BlueShield of Tennessee	Susan Langford	Y
Cigna	Meredith Ray	Y
Claim.MD	Nihal Titan	Y
CMS	Daniel Kalwa	Y
Cognizant/ Trizetto	Dawn Duchek	Y
Cognizant/ Trizetto	Patricia Wijtyck	Y
Cognosante	Daniel Saunders	Y
Edifecs	Cristina Boincean	
Elevance Health	Christol Health	
Elevance Health	Meg Kutz	Y
Epic	James Habermann	
Gainwell Technologies	Megan Soccorso	Y
Health Care Service Corporation	Donna Campbell	
Health Care Service Corporation	Andrea Huffstetler	Y
Health Care Service Corporation	Brian Pickens	Y
HealtheNET	Christopher Gracon	Y
HFMA	Katie Gilfillan	Y
HFMA	Shawn Stack	
Horizon BCBS	Athalage Bandula	
Labcorp	Gheisha-Ly Rosario Diaz	Y
Michigan Medicaid	Diana Fuller	Y

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Organization	Name	Attendance
Michigan Medicaid	Chuck Veverka	Y
NACHA	Brad Smith	Y
NAHDO	Charles Hawley	
NCPDP	Margaret Weiker	
NextGen Healthcare	Nancy Team	
Ohio Health	Mary Alexander	
Optum	Nathaniel Boer	
Optum	Lynn Chapple	Y
Optum	Everet Ford	
Optum	Tara Rose	Y
Optum	Kristin Thonsgaard	Y
OSF Healthcare	Rene Utley	
PeaceHealth	Marie Becan	
Point32	Monal Patel	
SS&C Health	Nina Boldosser	Y
Tata Consulting Services (TCS)	Mary Susman	Y
UnitedHealthcare	Holly Gilligan	
US Department of Veteran Affairs	Stephanie Farley	
WEDI	Robert Tenant	Y
X12	Michelle Barry	Y