

**CAQH Committee on Operating Rules for Information Exchange (CORE)
Review Work Group Call #2
Call Summary: Thursday, October 19, 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.

| <i>Agenda Item</i> | <i>Key Discussion Points</i> | <i>Decisions and Actions</i> |
|---|--|--|
| 1. Welcome, Antitrust Guidelines, and Participant Dashboard (Doc #1 Slides 1-4) | <ul style="list-style-type: none"> • Patricia Wijtyk (Cognizant) opened the call and welcomed everyone to the group. Ms. Wijtyk 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. Summary of 09/14/23 Work Group Call (Doc #2) | <ul style="list-style-type: none"> • Patricia Wijtyk (Cognizant) provided a summary of RWG Call #1: <ul style="list-style-type: none"> ○ RWG Call #1 introduced the co-chairs and purpose of the RWG, along with the scope, timeline, and key focus areas. This first meeting introduced the relevant operating rules for discussion, which include draft and updated rules for Value-based Payments (VBP), Health Care Claims, and EFT & ERA Enrollment Data. • Ms. Wijtyk (Cognizant) asked the group for a motion to approve the call summary. | Action required: <ul style="list-style-type: none"> • Approved 09/14/2023 call summary. • Motion to approve by Robert Tennant (WEDI) and seconded by Tara Rose (Optum). |
| 3. Level Set (Doc #1 Slides 5-7) | <ul style="list-style-type: none"> • Donna Campbell (HCSC) reviewed the scope, goals, and timeline of the Review Work Group (RWG), including the updated and newly drafted operating rules for the group to review. Ms. Campbell also noted that the results of Straw Poll #1 will be reviewed in today's meeting. | <i>Discussion</i> |
| 4. Draft Value-based Payment Operating Rules Straw Poll #1 Results (Doc #1 Slides 8-21) | <ul style="list-style-type: none"> • Katie Gilfillan (HFMA) reviewed the overall results of Straw Poll #1. • Mike Phillips (CORE), Ms. Wijtyk, Ms. Campbell, and Ms. Gilfillan reviewed the results and comments received in each section of Straw Poll #1. • Summary of RWG Discussion: <ul style="list-style-type: none"> ○ Comments received regarding CORE Benefit Enrollment and Maintenance Data Content Rule: <ul style="list-style-type: none"> – While Mr. Phillips reviewed the comments received in Straw Poll #1, Diana Fuller (State of Michigan Medicaid) asked about Section 4.3 of the Benefit Enrollment and Maintenance Data Content Rule. – Ms. Fuller asked why “Middle Eastern” and “North African” were highlighted and if the TR3 5010 version of the 834 allows ethnicity fields to be repeated 10 times. Mr. Phillips responded that the two ethnicity categories were a type of “futureproofing”, as CORE expects this collection standard to be emerging in the next few months. Mr. Phillips also confirmed that the technical report allows for up to 10 ethnicities to be entered. – Ms. Fuller asked for clarification on the Gender Identity portion (Section 4.5) regarding “self-reporting” and why it is listed as “unknown” if the patient does not want to provide this information. Mr. Phillips noted that these four values for gender identity are part of the Gender | <i>Discussion</i> |

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| | <p>Harmony project at HL7. When the data is exchanged, it is exchanged as a null/unknown value.</p> <ul style="list-style-type: none"> - Christopher Gracon (HEALTHeNET) asked why information can't be processed in certain cases for Member Language (Section 4.4) when using ISO 639-2 Codes. Mr. Phillips responded that in an ideal world, all of the information is formatted well. If the data does come in another format, it would require the health plan to process it in another way to ensure it meets the requirements for the 639-3. - Nancy Spector (AMA) asked about self-reporting for race and ethnicity and noted their concerns regarding the DMG 10/11. Mr. Phillips noted that the code set is relatively robust, with many options including observer reporting. However, the point of this rule is to help evaluate value-based care program success and quality. He noted that including whether data is observer reported is helpful for those looking to build out these programs. | |
| 5. Draft Health Care Claim Operating Rules (Doc #1 Slides 22-26) | <ul style="list-style-type: none"> • Ms. Gilfillan (HFMA) reviewed the two rules put together by the Health Care Claims Work Group: Health Care Claim (837) Data Content Rule and Health Care Claim Acknowledgement (277CA) Data Content Rule. • Pete Benziger (CORE) noted that the goal is to increase standardization, reduce manual intervention, and leverage the pre-existing technical framework for electronic claims transmission and adjudication. • Ms. Campbell (HCSC) summarized the operating rules being reviewed in each RWG meeting. | |
| 6. Next Steps (Doc #1 Slides 27-28) | <ul style="list-style-type: none"> • Ms. Campbell (HCSC) reviewed the next steps and expressed the importance of Straw Poll completion in guiding the discussions and operating rule refinement. Straw Poll #2 will be distributed on October 25th and the next RWG call is at 2:00 PM EST on Thursday, November 16th. <ul style="list-style-type: none"> ○ CORE RWG Co-Chairs & Staff: <ul style="list-style-type: none"> - Distribute Straw Poll #2 to participants by 10/25/2023, 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 #2 in preparation for Call #3 on Thursday, November 16th. ○ RWG Participating Organizations: <ul style="list-style-type: none"> - Complete Straw Poll #2 by November 10th, EOD. - Participate in Call #3 on Thursday, November 16th, from 2:00-3:30 PM EST. | <p><u>Action required:</u></p> <ul style="list-style-type: none"> • Agree to Next Steps. |

| Call Documentation |
|---|
| Doc 1: RWG Call 3 Deck 11.16.23.pdf |
| Doc 2: RWG Call 2 Summary 10.19.23.pdf |

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CORE Contact Information

Erin Weber
Vice President, CORE
eweber@caqh.org

Bob Bowman
Principal, CORE
rbowman@caqh.org

Taha Anjarwalla
Associate Director, CORE
tanjarwalla@caqh.org

Michael Phillips
Sr. Manager, CORE
mphilips@caqh.org

Pete Benziger
Sr. Manager, CORE
pbenziger@caqh.org

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

| Organization | Name | Attendance |
|---|---------------------|------------|
| Aetna | Rose Hodges | |
| Aetna | Kellene Parthemore | Y |
| Aetna | Mark Warren | |
| Aetna | Heather Morgan | |
| Aetna | Mark Rabuffo | Y |
| Aetna | Marianne Davidson | Y |
| Aetna | Matthew Burkard | |
| American Hospital Association (AHA) | Terrence Cunningham | |
| American Hospital Association (AHA) | Andrea Preisler | Y |
| American Medical Association (AMA) | Heather McComas | Y |
| American Medical Association (AMA) | Nancy Spector | Y |
| American Medical Association (AMA) | Erica Martin | Y |
| Ameritas Life Insurance Corp. | Noah Mastel | |
| Ameritas Life Insurance Corp. | Kristina Steece | |
| Arizona Health Care Cost Containment System | Era Rodriguez | Y |
| Aspen Dental Management | Margaret Schuler | |
| athenahealth | Emidio DePina | Y |
| Availity, LLC | Tonya Moffitt | |

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| Organization | Name | Attendance |
|--|-------------------------|-------------------|
| Availity, LLC | Michelle Barry | Y |
| Blue Cross Blue Shield- Illinois | Donna Campbell | Y |
| Blue Cross Blue Shield- Illinois | Brian Pickens | |
| Blue Cross Blue Shield- Michigan | Cynthia Monarch | Y |
| Blue Cross Blue Shield – North Carolina | Heather Sammons | |
| Blue Cross Blue Shield- Tennessee | Susan Langford | Y |
| Centers for Medicare and Medicaid Services (CMS) | Daniel Kalwa | Y |
| Change Healthcare | Nathaniel Boer | |
| Change Healthcare | Kristin Thonsgaard | Y |
| CIGNA | Meredith Ray | Y |
| ClaimMD | Nihal Titan | |
| Cognizant | Patricia Wijtyk | Y |
| Cognosante | Daniel Saunders | Y |
| Edifecs | Cristina Boincean | |
| Elevance | Meg Kutz | |
| Elevance | Christol Green | Y |
| Epic | James Habermann | |
| Epic | Benjamin Tarmann | |
| Gainwell Technologies | Megan Soccorso | Y |
| Health Care Service Corporation (HCSC) | Andrea Huffstetler | Y |
| Healthcare Financial Management Association (HFMA) | Shawn Stack | Y |
| Healthcare Financial Management Association (HFMA) | Katie Gilfillan | Y |
| HEALTHeNET | Christopher Gracon | Y |
| Horizon | Athalage Bandula | Y |
| Laboratory Corporation of America | Gheisha-Ly Rosario Diaz | Y |
| Michigan Medicaid | Chuck Veverka | Y |
| Michigan Medicaid | Diana Fuller | Y |

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|---|--------------------|-------------------|
| NACHA The Electronic Payments Association | Brad Smith | Y |
| National Association of Health Data Organizations (NAHDO) | Charles Hawley | Y |
| National Council for Prescription Drug Programs (NCPDP) | Margaret Weiker | |
| NextGen Healthcare Information Systems, Inc. | Nancy Team | |
| OhioHealth | Mary Alexander | |
| OptumInsight | Everet Ford | |
| OptumInsight | Tara Rose | Y |
| OptumInsight | Lynn Chapple | Y |
| OSF Healthcare | Rene Woerner-Utley | |
| PeaceHealth | Marie Becan | Y |
| Point32Health | Monal Patel | Y |
| SS&C Health | Nina Boldosser | |
| Tata Consultancy Services Ltd | Mary Sussman | |
| TriZetto Corporation, A Cognizant Company | Dawn Duchek | |
| United States Department of Veterans Affairs | Stephanie Farley | Y |
| UnitedHealthGroup | Holly Gilligan | |
| Work Group for Electronic Data Interchange (WEDI) | Robert Tennant | Y |