Meeting Etiquette

• **Remember:** If you are not speaking, **please keep your phone on mute**

• **Do not put your phone on hold.** If you need to take a call, hang up and dial in again when finished with your other call
  
  » **Hold = Elevator Music = frustrated speakers and participants**

• **This meeting is being recorded**
  
  » Another reason to keep your phone on mute when not speaking

• **Use the “Chat” feature** for questions, comments and items you would like the moderator or other participants to know.
  
  » **Send comments to ALL PANELISTS** so they can be addressed publically in the chat, or discussed in the meeting (as appropriate).
## Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Presenter</th>
</tr>
</thead>
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<tr>
<td>Welcome / Introductions</td>
<td>Stacy Perchem (ONC)</td>
</tr>
<tr>
<td>Background and Project Overview</td>
<td>Jamie Parker (Carradora)</td>
</tr>
<tr>
<td>Working with HL7</td>
<td>Jamie Parker (Carradora)</td>
</tr>
<tr>
<td>Track 1: eLTSS Informative Document</td>
<td>Mark Meadows (Georgia Team)</td>
</tr>
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<td>Track 2: eLTSS FHIR Implementation Guide</td>
<td>Becky Angeles (Carradora)</td>
</tr>
<tr>
<td>eLTSS Community Engagement</td>
<td>Jamie Parker (Carradora)</td>
</tr>
<tr>
<td>Upcoming ONC 2018 Annual Meeting</td>
<td>Stacy Perchem (ONC)</td>
</tr>
</tbody>
</table>
Welcome
# Introducing eLTSS Phase 3 Support Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnathan Coleman</td>
<td>Program Manager for eLTSS 3</td>
<td>SRS</td>
</tr>
<tr>
<td>Amber Patel</td>
<td>Project Manager</td>
<td>SRS</td>
</tr>
<tr>
<td>Greg White</td>
<td>Project Analyst</td>
<td>SRS</td>
</tr>
<tr>
<td>Bonnie Young</td>
<td>Project Manager for TEFT Project State of GA</td>
<td>Georgia Team</td>
</tr>
<tr>
<td>Mark Meadows</td>
<td>Technical Business Analyst State of GA</td>
<td>Georgia Team</td>
</tr>
<tr>
<td>Irina Connelly</td>
<td>Research Scientist II on GA eLTSS Team</td>
<td>Georgia Team</td>
</tr>
<tr>
<td>Jack Wallace</td>
<td>Research Scientist on GA eLTSS Team</td>
<td>Georgia Team</td>
</tr>
<tr>
<td>Becky Angeles</td>
<td>Analyst and Harmonization specialist</td>
<td>Carradora</td>
</tr>
<tr>
<td>Taima Gomez</td>
<td>Support Team</td>
<td>Carradora</td>
</tr>
<tr>
<td>Jamie Parker</td>
<td>SME</td>
<td>Carradora</td>
</tr>
</tbody>
</table>
Background and Project Overview
eLTSS Initiative At-A-Glance

- **2015**
  - eLTSS Initiative Kick-off
  - Nov ‘14

- **2016**
  - Use Case Complete

- **2017**
  - eLTSS Dataset Harmonization
  - Round 1 Pilots
  - eLTSS Supplemental Begins (eLTSSv2)

- **2018**
  - eLTSS Final Dataset Published
  - eLTSS Dataset to HL7 Mapping Complete
  - eLTSS Whitepaper Balloted through HL7

- **2019**
  - eLTSS Informative Document (Whitepaper) Published via HL7
  - eLTSS FHIR IG Balloted through HL7

- **2020**
  - eLTSS FHIR IG Published via HL7
  - eLTSS Ballot Reconciliation Complete, Changes Made, Negative Votes Withdrawn

*Italics text = future proposed dates (subject to change)*
Review of the eLTSS Project (Phase 1 and 2)

• The eLTSS project is a joint project between CMS and ONC, established to advance data-level interoperability for the home and community-based services (HCBS) community.

  » The project aim is to advance data-level interoperability for the Home and Community-Based Services (HCBS community) and to facilitate the identification and validation of a data standard for capturing and exchanging person-centered LTSS service plan data.

• Key Accomplishments

  » eLTSS Dataset Published: Collaborative requirements gathering, and harmonization efforts have culminated in the publication of the eLTSS dataset and supporting documentation (e.g. use cases, etc.).

    – The eLTSS dataset contains data items commonly found on LTSS Service Plans and serves as the groundwork for developing electronic means for exchanging LTSS data.

To track and review eLTSS Artifacts including the published dataset please see the eLTSS wiki: https://oncprojecttracking.healthit.gov/wiki/display/TechLabSC/eLTSS+Home
eLTSS Current and Future Plans (Phase 3)

- **September – December 2018**
  - **September – October**: Initial Implementer Guidance (eLTSS Informative Document) balloted by HL7:
    - The eLTSS Informative document serves as the initial technical specification for leveraging FHIR and C-CDA Health IT Standards for exchanging eLTSS Dataset items.
    - It served to introduce LTSS needs to the HL7 community.
    - This informative document may be used to support LTSS solution provider pilots who want to electronically exchange a service plan.
  - **November – December**: Republish final Informative Document prior to January HL7 meeting

- **January – September 2019**
  - **January – May**: eLTSS FHIR Implementation Guide: The eLTSS FHIR Implementation Guide is currently under development and is expected to be included in the May 2019 HL7 ballot.
    - This IG provides robust formal guidance on how to leverage FHIR to exchange eLTSS Dataset data. It will also be able to support continued piloting efforts by implementers.
  - **June – September**: eLTSS FHIR IG ballot comments dispositioned
    - The disposition process includes reviewing and responding comments as well as update and republishing the final IG based on comment resolution.
eLTSS Phase 3 Overview

- The scope of this work will build on previously conducted work that supported development of eLTSS plan standards and further collaboration between ONC, CMS, and TEFT grantees with standards development organizations (SDOs)

- **Track 1: Informative Document reconciliation and publication**
  - Complete comment disposition
    - the team must bring the proposed dispositions to the HL7 sponsoring workgroup (Community-Based Care and Privacy (CBCP)) to get approval for the proposed dispositions.
  - Workgroup votes on proposed dispositions
  - All approved changes based on dispositions must be incorporated into the final document
  - Final document published

- **Track 2: eLTSS FHIR Implementation Guide**
  - The Georgia team (Georgia Department of Community Health (DCH) and Georgia Tech Research Institute (GTRI)) and ONC Support team (SRS, Carradora) teams will use the published eLTSS Informative Document as a basis to create an HL7 FHIR Implementation Guide (IG). The FHIR IG is scheduled for the May 2019 HL7 Ballot Cycle.
eLTSS Roadmap 2018 to 2019

1. HL7 Informative Document Publication Process
   - Preparation for Publication
   - Comment Review and Reconciliation
   - Negative Comments Withdrawn
   - HL7 WG (CBCP) Reconciliation Approvals

   - Publication Request submitted to HL7
   - Final Informative Document Published

2. FHIR Implementation Guide Development
   - FHIR IG Development

   - FMG PSS Approval
   - PSS Submitted for May 19 Ballot
   - Notice of Intent to Ballot WG Approval
   - Notification of Intent to Ballot, IG is “Functionally Ready”
   - IG Substantive Change Freeze
   - Ballot Pool Opens

   - Final Freeze Deadline – QA complete
   - HL7 May 19 Ballot Period
   - HL7 May 19 Meeting
   - IG Reconciliation

   - Publish IG

Timeline Key: ★ = Project Milestone  ➔ = Project Window
Working with a Standards Development Organization – HL7
Working with an SDO such as HL7 provides a way to integrate our efforts to enable interoperability for Home and community based services (HCBS) and supports into the broader healthcare interoperability landscape bridging the gap to the larger clinical ecosystem. Being able to leverage an industry recognized standard gives implementers the framework necessary to create interoperability between and across different healthcare entities.

http://www.hl7.org/

Within HL7, our work is being conducted under the guidance of the following workgroups:

- Community Based Care and Privacy (CBCP)
- Patient Care (PC)
- Structured Documents (SD)
- FHIR Management Group (FMG)
- Financial Management (FM)
- Orders and Observations (O&O)

Participated in the 2018 HL7 September Working Group Meeting
Track 1: eLTSS Informative Document
Formal Name Change Requested and Granted

- HL7 requested a name change to the balloted eLTSS White Paper to reflect the intent of the paper which was to inform the HL7 community.

- The eLTSS White Paper name was formally changed to “HL7 Cross-Paradigm Information Sharing for Electronic Long-Term Services & Supports (eLTSS), Release 1”.

- Throughout this slide deck we will reference it as the eLTSS Informative Document.
Informative Document: Provide the HL7 Community with context and narrative around how two national recognized standards, FHIR and C-CDA, can be used to represent and exchange the eLTSS Dataset

Introduction, Objectives and Background

LTSS Ecosystem Overview and Information Sharing Use Cases

FHIR and C-CDA for LTSS Service Plan Information Exchange
  - Approach for Selecting Standards
  - Overview of Selected Standards and Mapping Results
  - Exchanging LTSS Service Plans Using FHIR
  - Exchanging LTSS Service Plans Using C-CDA

Considerations for Future Work

Appendices:
  - eLTSS Dataset
  - FHIR and C-CDA Mappings
  - FHIR and C-CDA sample instances
  - C-CDA rendered sample
  - Quality of Mapping Legend
HL7 Ballot Voting Results

• The eLTSS Informative Document was balloted through the HL7 September 2018 Ballot Cycle

<table>
<thead>
<tr>
<th>Voter Role</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affiliate</td>
<td>5</td>
</tr>
<tr>
<td>Consultant</td>
<td>21</td>
</tr>
<tr>
<td>Government/Non-Profit</td>
<td>36</td>
</tr>
<tr>
<td>Payor</td>
<td>9</td>
</tr>
<tr>
<td>Pharmaceutical</td>
<td>0</td>
</tr>
<tr>
<td>Provider</td>
<td>22</td>
</tr>
<tr>
<td>Vendor</td>
<td>24</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>117</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vote Type</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affirmative</td>
<td>43</td>
</tr>
<tr>
<td>Abstain</td>
<td>56</td>
</tr>
<tr>
<td>Negative</td>
<td>4</td>
</tr>
<tr>
<td>Did Not Vote</td>
<td>14</td>
</tr>
<tr>
<td><strong>Total Voters</strong></td>
<td><strong>117</strong></td>
</tr>
</tbody>
</table>

» The eLTSS Informative Document achieved quorum and the ballot passed

» A total of 75 comments were received from Voters
### HL7 Ballot Comment Results

- **Ballot Comment Results**

<table>
<thead>
<tr>
<th>Comment Type</th>
<th>#</th>
</tr>
</thead>
<tbody>
<tr>
<td>(A-A) Affirmative Vote without Qualification</td>
<td>5</td>
</tr>
<tr>
<td>(A-S) Affirmative Vote with Suggestion</td>
<td>28</td>
</tr>
<tr>
<td>(A-T) Affirmative Vote with Typo</td>
<td>4</td>
</tr>
<tr>
<td>(A-Q) Affirmative Vote with Question</td>
<td>13</td>
</tr>
<tr>
<td>(A-C) Affirmative Vote with Comment</td>
<td>10</td>
</tr>
<tr>
<td>(NEG) Negative Vote with Comment</td>
<td>14</td>
</tr>
<tr>
<td>Blank (unclassified)</td>
<td>1</td>
</tr>
<tr>
<td><strong>TOTAL COMMENTS</strong></td>
<td>75</td>
</tr>
</tbody>
</table>
Ballot Comment Reconciliation Process and Metrics

• Ballot Reconciliation Process
  » **Ballot Comment Reconciliation Spreadsheet**
  1. GA Team: Draft dispositions for comments
  2. eLTSS Project Team: Review and modify dispositions for comments (Wednesdays) 
  3. eLTSS Federal Partners: Review comment dispositions (Thursdays) 
  4. eLTSS Project Team: Send comment dispositions to HL7 CBCP Listserv for review (Thursdays) 
  5. HL7 CBCP WG: Vote on comment dispositions (Tuesdays)
  6. Repeat as necessary

• Ballot Reconciliation Metrics (as of 11/13/18)

<table>
<thead>
<tr>
<th>Comments Rcvd</th>
<th>Comments Addressed</th>
<th>Comments Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>75</td>
<td>64</td>
<td>11</td>
</tr>
</tbody>
</table>
Track 2: eLTSS FHIR Implementation Guide
Based on the scenarios articulated in the eLTSS use cases, the FHIR framework is a great fit for enabling eLTSS exchanges due to its focus on streamlined API-based interoperability, flexible and modular approach and comprehensive focus aimed at supporting clinical, administrative and social services workflow needs.

The eLTSS FHIR Implementation Guide (IG) will provide implementers with online guidance (API specifications, capability statements, and resource profiles) on how to use FHIR to exchange eLTSS data.

The FHIR IG development process is strict and relies heavily on prescriptive deadlines with each step being dependent on previous steps and outside resources (artifact approvals, tooling modifications/versioning, etc.).

The goal of this next phase of the eLTSS project is to mature and formalize the details published in the eLTSS Informative Document into the eLTSS FHIR IG which will be balloted as a Standard for Trial Use (STU). An STU balloted IG at provides implementers with comprehensive guidance on how to use FHIR to enable electronic exchange of the eLTSS Dataset data items.
<table>
<thead>
<tr>
<th>What Needs Done</th>
<th>How Do We Get It Done?</th>
<th>Why Do It?</th>
<th>When is it Due?</th>
</tr>
</thead>
</table>
| Introduce Upcoming Ballot to HL7 | • Contact FHIR FMG of our upcoming plans and get insight from them on action needed  
   • Attend Jan 2019 HL7 WGM to present our upcoming plans to FHIR, CBCP, and Other Interested WGs (O&O, FM, PC) | HL7 recommends that prior to officially compiling a ballot that a project considering developing a ballot circulate and introduce the idea of the work to the appropriate HL7 work groups. This allows the work groups to provide guidance and feedback before the formal ballot process begins. | 1/18/19 |
| Project Scope Statement (PSS) | • Modify the existing PSS for the eLTSS Informative Document for the FHIR IG  
   • Need approval from: CBCP WG, FHIR Management Group (FMG), US Realm Steering Committee, Steering Division, Architectural Review Board, and Technical Steering Committee. | This form is the formal introduction of our work to HL7 WGs. This form outlines the sponsoring WGs, project team, project scope and need, and any external drivers and dependencies. | 1/27/19 |
| FHIR IG Proposal | • Complete and submit to FHIR Management Group (FMG) | Acceptance of proposal will result in the creation of the eLTSS project within the HL7 framework. | TBD |
| Notification of Intent to Ballot (NIB) | • Work with CBCP WG to complete and submit form to HL7 | This officially notifies HL7 of our projects intent to move forward with a ballot for the May 2019 cycle. | 2/17/19 |
| Functionally Complete IG | • Work with CBCP FHIR Liaison (John Moerhke)  
   • Download and install appropriate HL7 FHIR IG Tooling  
   • Develop Profiles  
   • Develop FHIR Sample Files  
   • Populate required IG sections with Content | To validate and prioritize ballots and to develop the framework to support the ballots, HL7 is requiring a Functionally Complete IG as part of the NIB package. | 2/17/19 |
| Final Content | • Submit Complete FHIR IG to HL7 for QA | HL7 requires a new QA period for all FHIR ballots to ensure ballots are well developed prior to the ballot period. | 3/3/19 |
| Final Freeze | • Complete and submit FINAL FHIR IG Content (all text, profiles, sample files, etc.) to HL7. | Required by HL7 – ensures the ballot content and structure is ready for ballot opening. | 3/24/19 |
# HL7 FHIR Balloting Timeline and Artifacts (2/2)

<table>
<thead>
<tr>
<th>What Needs Done</th>
<th>How Do We Get It Done?</th>
<th>Why Do It?</th>
<th>When is it Due?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ballot Consensus Pool</strong></td>
<td>• Sign up for the eLTSS FHIR IG ballot pool on the HL7 Ballot Desktop</td>
<td>To vote on an HL7 ballot a voter must sign up to be part of the ballot pool. This is similar to voter registration.</td>
<td>3/1 – 3/28/19</td>
</tr>
<tr>
<td><strong>Ballot Period</strong></td>
<td>• Submit and monitor vote / comments</td>
<td>This is when the formal voting takes place. Anyone signed up for the ballot pool is able to vote.</td>
<td>3/29 – 4/29/19</td>
</tr>
<tr>
<td><strong>May 2019 WGM</strong></td>
<td>• Held in Montreal (Quebec) Canada</td>
<td>HL7 requires that ballot results are shared at the working group meeting associated with the ballot. Ballot reconciliation will often begin at the working group meeting.</td>
<td>5/4 – 5/10/19</td>
</tr>
<tr>
<td></td>
<td>• Begin comment reconciliation of ballot comments (virtually)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ballot Comment Reconciliation</strong></td>
<td>• Work with ballot voters and CBCP WG to dispose all ballot comments</td>
<td>Required by HL7 as part of the ballot process.</td>
<td>5/4/2019</td>
</tr>
<tr>
<td><strong>Modify IG</strong></td>
<td>• Make modifications to eLTSS FHIR IG based on comments</td>
<td>Enhance the specification based on comment feedback.</td>
<td>TBD (based on # of comments)</td>
</tr>
<tr>
<td><strong>Publish IG</strong></td>
<td>• Publish eLTSS FHIR IG using HL7 tooling</td>
<td>Standard is available for implementation and use.</td>
<td>TBD (dependent on comments)</td>
</tr>
</tbody>
</table>
eLTSS Community Engagement
**eLTSS Community Engagement**

- **Join the HL7 CBCP WG weekly calls to engage in ballot reconciliation review**
  - Tuesdays 12:00 – 1:00pm ET
  - [http://join.freeconferencecall.com/cbhs](http://join.freeconferencecall.com/cbhs)
  - Conference Audio: (515) 604-9861 / Access Code: 429554

- **Attend the January 2019 HL7 Working Group Meeting (WGM) January 12-18, 2019 in San Antonio, TX**
  - WGM Information / Registration: [https://www.hl7.org/events/working_group_meeting/2019/01/](https://www.hl7.org/events/working_group_meeting/2019/01/)

- **Visit the eLTSS HL7 GForge Site for ballot-related artifacts:**

- **Visit the eLTSS Confluence Page for meeting information and relevant artifacts:**
  - [https://oncprojecttracking.healthit.gov/wiki/display/TechLabSC/eLTSS+Home](https://oncprojecttracking.healthit.gov/wiki/display/TechLabSC/eLTSS+Home)
eLTSS Initiative: Project Team Leads

- **ONC Leadership**
  - Stacy Perchem ([Anastasia.perchem@hhs.gov](mailto:Anastasia.perchem@hhs.gov))
  - Elizabeth Palena-Hall ([elizabeth.palenahall@hhs.gov](mailto:elizabeth.palenahall@hhs.gov))

- **CMS Leadership**
  - Kerry Lida ([Kerry.Lida@cms.hhs.gov](mailto:Kerry.Lida@cms.hhs.gov))

- **State of Georgia, Department of Community Health Leadership**
  - Bonnie Young ([bonnie.young@dch.ga.gov](mailto:bonnie.young@dch.ga.gov))

- **Program Manager**
  - Johnathan Coleman ([jc@securityrs.com](mailto:jc@securityrs.com))

- **Project Management**
  - Amber Patel ([ayp@securityrs.com](mailto:ayp@securityrs.com))

- **Subject Matter Expert**
  - Jamie Parker ([jamie.parker@carradora.com](mailto:jamie.parker@carradora.com))

- **Harmonization Lead**
  - Becky Angeles ([becky.angeles@carradora.com](mailto:becky.angeles@carradora.com))
Upcoming: ONC 2018 Annual Meeting
ONC 2018 Annual Meeting

- Date: November 29 – November 30, 2018
- Location: Washington Hilton, Washington, DC
- Breakout session of interest:
  - Friday, November 30th 3:00-4:00 pm ET: Advancing Interoperability in Home and Community Based Services (HCBS)
Thank you for joining!