PDEX Member Attribution Use Cases

#P Dex

Use Case 1: Get All Attributed Members

Provider requests Payer for Patient List for all attributed Members assigned to them.

Use Case 2: New Patients

Provider requests all clinical data held by Payer for roster of New Patients.

Use Case 3: Existing Patients

Provider requests latest clinical data held by Payer for roster of Existing Patients.

Use Case Guidelines

- Payer determines attributed members for a Provider.
- Provider may submit a subset of the member list with a data access request.
- Payer will confirm submitted list is validated against the full attributed member list that the Payer maintains.
- When a list submitted by a Provider contains a non-attributed member that member will be dropped from the processed list of attributed members.
• A list submitted by a Provider will be processed using FHIR Bulk Async protocols
• A provider MAY pass a parameter to limit data to be returned. e.g., to only request data since a previous request was processed. For example, using the $everything operation using the \texttt{since} parameter to set a date range for the data being requested.

**Typical Interactions**

1. Provider queries for their Member Attribution Lists using NPI and/or Tax ID, or Managing Organization.
2. Provider submits full or partial list (a subset of full attribution list) to Payer endpoint to perform a /Patient/$export with the List provided to identify the patients who data is to be retrieved.
   2.1. Provider can define Resource Types and SINCE parameter to limit the data returned.
   2.2 Provider can submit a /Patient/$export to retrieve ALL data for members included in Attribution list they submit to the $export operation.

**Questions**

• If a Payer generates the "master" attribution list do we need to have identifiers for the sub lists used by the provider. e.g., New Patients v Existing Patients. Or would the same NPI/Tax Identifier be used and the ID would differentiate the different Group records submitted in an operation to the Payer.
• Do we want a custom operation that would require the Group list to limit the patients returned?
• Do we want to submit the Group list to the OAuth Server to create a token that limits scope to the patients in the Group
List (non-attributed members in the list would be excluded.)