CMS Connectathon Kick-Off

CARIN IG for Digital Insurance Card
Agenda

• Track Logistics
• Track Lead
• Timeline of Activities
• Track Purpose and Goals
• Scenario
When and Where

VIRTUAL

July 18-20

East Coast Time Zone (9:00am – 5:00pm)

Register: https://www.eventbrite.com/e/centers-for-medicare-and-medicaid-services-and-hl7-fhir-connectathon-tickets627386478847
Track Logistics

Track Page:
https://confluence.hl7.org/display/FHIR/2023+-+07+CARIN+IG+For+Digital+Insurance+Card
Track Leads

Mark Roberts
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Lead, CARIN Alliance
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Zulip: @markroberts

JP Pollak
Co-founder & Chief Architect,
The Commons Project

If you have questions, please email or send a Zulip chat message!
Track Touchpoint Calls

Testers should join the two touchpoint calls to coordinate testing objectives.

**Touchpoint Call #1: 12 pm ET on Wednesday, June 28**

Zoom link: [https://leavittpartners.zoom.us/j/96180853172?pwd=QWRFOUM4NHkvSXI2SloemtuSEswUT09&from=addon](https://leavittpartners.zoom.us/j/96180853172?pwd=QWRFOUM4NHkvSXI2SloemtuSEswUT09&from=addon)
Password: 996150

**Touchpoint Call #2: 12 pm ET on Wednesday, July 12**

Zoom link: [https://leavittpartners.zoom.us/j/98678476917?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&from=addon](https://leavittpartners.zoom.us/j/98678476917?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&from=addon)
Password: 437254
# Timeline of Activities

<table>
<thead>
<tr>
<th>Start Time</th>
<th>End Time</th>
<th>Session Type</th>
<th>Session Title</th>
<th>Session Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 PM</td>
<td>3:05 PM</td>
<td>General Session</td>
<td>Welcome / Track Kick Off and Intro</td>
<td>Welcome and introduction to the track</td>
</tr>
<tr>
<td>3:05 PM</td>
<td>3:30 PM</td>
<td>IG Overview</td>
<td>CARIN Digital Insurance IG &amp; SHC/SHL Overview</td>
<td>An in depth overview of the IG and proposed future updates</td>
</tr>
<tr>
<td>3:30 PM</td>
<td>4:00 PM</td>
<td>Office Hours</td>
<td>Ask the IG Leads Anything</td>
<td>Office hours to ask the IG leads questions</td>
</tr>
<tr>
<td>4:00 PM</td>
<td>5:00 PM</td>
<td>Testing</td>
<td>Testing</td>
<td>Testing of the proposed futures updates to the IG</td>
</tr>
</tbody>
</table>
CARIN Digital Insurance Cards IG Review

- Defines required data elements from the card
- Maps required elements to FHIR data profile
- Defines consumer access use case:
  - Consumer access to the digital insurance card via mobile apps or other third party stewards
  - Patient access apps and others access insurance card data via SMART on FHIR API
  - Can also support patient-directed access to providers via FHIR API and SMART Auth flow
SMART Health Cards Review

- FHIR bundle contains the clinical data payload
  - Specific profiles exist for immunizations and lab results, but any FHIR bundle will work
  - [https://build.fhir.org/ig/HL7/fhir-shc-vaccination-ig/](https://build.fhir.org/ig/HL7/fhir-shc-vaccination-ig/)
- Verifiable Credential (W3C) standard is used for signing, issuing, and presenting
- Provided as QR code, .smart-health-card file, or via FHIR API
- Trust Framework determines and provides the listing of trusted issuers
  - e.g. [https://github.com/the-commons-project/vci-directory](https://github.com/the-commons-project/vci-directory)
- Free and open source validation tools verify and extract data
SMART Health Links Review

- Expands the SMART Health Cards protocol, so users can share links to
  - A SMART Health Card that is too big to fit in a QR
  - A SMART Health Card that changes over time or is generated in real time
  - Bundles of data such as FHIR bundles or SMART Health Cards from multiple sources
  - Provision access to SMART on FHIR APIs for comprehensive sharing

- WIP Use cases:
  - Complete immunization record
  - International Patient Summary (IPS)
  - Insurance card
  - Advanced directives
  - Vital records

Argonaut, SMART Health IT, VCI | https://docs.smarthealthit.org/smart-health-links/
SMART Health Links Technical Review

- FHIR bundles contain the clinical data payload
- SMART Health Cards or FHIR bundles are hosted in the cloud
  - Data are encrypted, can expire, can be passcode protected
- SMART Health Link provides access to artifacts, including decryption key
- Shared as QR code or URL, can include information about web viewer
- Free and open source tools verify and extract data
SMART Health Links for CARIN Digital Insurance Card

• Payors create digital insurance card, make it available to members
  - Generate the FHIR bundle defined by the CARIN IG
  - Generate SMART Health Link for a signed copy of the insurance FHIR data
  - Provide to members to import as a QR code, download button, or link

• Providers accept the insurance cards in online or in person check-in processes
  - Accept links or scan QR codes via tablets or webcams, check in kiosks, and in online check-in processes
  - Retrieve and validate the FHIR bundle
  - Integrate (or lean on vendors to integrate) data into existing workflows

• App and wallet makers provide people tools to manage their cards
  - Import cards, add to digital wallets, display QRs for sharing, links for pasting
SMART Health Links for CARIN Digital Insurance Card

• Use Cases:
  - Add SMART Health Links as a method for providing consumer access to the digital insurance card
  - Add SHL-based workflow

• Guidance:
  - Add reference to SHL as a method for providing and accessing the digital insurance card
  - Add specific guidance for how to implement the SHL spec among available options and choices

https://confluence.hl7.org/display/CAR/CARIN+IG+For+Digital+Insurance+Cards+SMART+Health+Links+Use+Case
Implementer Roles

• Data holders: generate a SMART Health Link
  – Use the CARIN IG data profile to create a FHIR bundle, then generate a SMART Health Link following the specific guidance defined for the use case
  – Display or send a QR code or link

• PHR/ wallet/ patient apps: capture, display, store, share the SMART Health Link
  – Consume a SHL from QR code or link, display and store it in app
    – Provide user a way to copy, screenshot, or otherwise surface SHL to share with a provider

• Providers/ platforms: ingest and validate the SMART Health Link
  – Provide user a way to share their QR code or link in a checkin flow
  – Consume and validate SHL from QR code or link, display and confirm details
Data Profile/IG Questions

• What is the right balance between patient privacy, ease of use, and efficiency? The SMART Health Link spec supports constructs like passcodes and expirations that protect individuals' data, but could make digital insurance cards more challenging in practical use.

• How can we make sharing digital insurance cards easier for patients in online check in flows, when pasting links or uploading QR codes might pose challenges for some users?