CARIN IG for Digital Insurance Card Track Kick Off Call

Mark Roberts and JP Pollak
8/17/2023
Track Kick Off Agenda

• Introduction to Track Leads
• Track Description
• Track Goals
• Responsibilities of Participants
  – Observers
  – Participants
• Track Breakouts
• List of Participants in the track
  – Reference to test servers
• How to find a test partner
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Lead, CARIN Alliance
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The Commons Project
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If you have questions, please email or send a Zulip chat message!
Track Logistics

Track Page
https://confluence.hl7.org/display/FHIR/2023+-+09+CARIN+IG+For+Digital+Insurance+Card

Zulip for Connectathon Testing

General Zulip
https://chat.fhir.org/#narrow/stream/285193-CARIN-IG-for-Digital-Insurance-Card
Track Touchpoints

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

Touchpoint Call #1: Wednesday, August 30 3-4pm ET
- Zoom
  https://leavittpartners.zoom.us/j/97908458457?pwd=T2RGbUwrcUFQVTZldkt2MFJzL2lGZz09&from=addon
  Password: 082038

Touchpoint Call #2: Wednesday, September 6th 12-1pm ET
- Zoom
  https://leavittpartners.zoom.us/j/93928874349?pwd=RDVLbDE1MVBUeTJpWEt2aFFjT1B5QT09&from=addon
  Password: 863191
# Timeline of Activities

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Session</th>
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<tbody>
<tr>
<td>Saturday, September 9</td>
<td>9:00 – 9:30am</td>
<td>HL7 FHIR Connectathon Kick-Off</td>
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<tr>
<td></td>
<td>9:30 – 10:30am</td>
<td>CARIN Digital Insurance Card Kick-Off &amp; Testing</td>
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<td></td>
<td>10:30 – 10:45am</td>
<td>Break for Morning Coffee</td>
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<td></td>
<td>10:45am – 12:00pm</td>
<td>Testing</td>
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<td>12:00 – 12:45pm</td>
<td>Lunch</td>
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<td>12:45 – 3:00pm</td>
<td>Continue Testing</td>
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<td>3:00 – 3:30pm</td>
<td>Cookie Break</td>
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<td>3:30 – 4:30pm</td>
<td>Continue Testing</td>
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<tr>
<td></td>
<td>4:30 – 5:00pm</td>
<td>Review Saturday’s Activity &amp; Testing</td>
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<tr>
<td>Date</td>
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<tr>
<td>Sunday, September 10</td>
<td>9:00 – 9:45am</td>
<td>Level Set for Sunday’s Activity &amp; Testing</td>
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<td>9:45 – 10:00am</td>
<td><strong>Break for Morning Coffee</strong></td>
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<td>10:00 – 11:00am</td>
<td>Continue Testing</td>
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<td>11:00am – 12:00 pm</td>
<td>Continue Testing</td>
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<td>12:00 – 1:00pm</td>
<td><strong>Lunch</strong></td>
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<td>1:00 – 2:00pm</td>
<td>Gather and Develop Report-Out Documentation</td>
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<td>2:00 – 3:00pm</td>
<td>Breakout Session in Room 1 &amp; Report-Out</td>
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<td>3:00 – 3:30pm</td>
<td><strong>Cookie Break</strong></td>
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<td>3:30 – 5:00pm</td>
<td>HL7 FHIR Connectathon Closing &amp; Report-Out</td>
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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/
• 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
• 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
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
Track Purpose and Goals

What’s the purpose of hosting this Implementation track? What do you hope to achieve?

- Test and gather feedback on the Implementation Guide.
- Test the new SMART Health Card/Link Use Case.

What are the goals?

- Generation, capture, display, and sharing of the SMART Health Link.
- Consume and validate SHL from QR code or link, display and confirm details.
Participants in this track

- **Data holders**: Generate a SMART Health Link
- **PHR/ wallet/ patient apps**: Capture, display, store, share the SMART Health Link
- **Providers/ platforms**: Ingest and validate the SMART Health Link
Main Scenario

Scenario: PHR/ wallet/ patient apps ingests SMART Health Link from Data Holder.

- **Action**: Data holder generates a digital insurance card as a SMART Health Link.
- **Precondition**: Data holder has capability to generate a SMART Health Link.
- **Success Criteria #1**: PHR/ wallet/ patient apps captures and display the SMART Health Link digital insurance card on the device.
- **Bonus Point #1**: Provider/platform ingests and validates SHL from QR code or link, displays and confirms details.
- **Bonus Point #2**: Successful testing of the full workflow of payer to individual to provider.
Shc-web-reader

Implementers can use the create-react-app web application that can run standalone or as a provider-launch SMART-on-FHIR application. It scans Smart Health Card QR Codes sourced from barcode scanners, copy/paste, connected cameras or by searching a patient record for scanned documents (e.g., an insurance card scan). Data from the SHC are displayed in a structured way and can be easily copied to complete structured input forms.

https://github.com/the-commons-project/shc-web-reader
https://viewer.tcpdev.org/

A useful repository with sample SMART Health Links
https://github.com/seanno/shc-demo-data
Track Report Out

• What was the track trying to achieve
• List of participants (with logos if you have time and energy)
• Notable achievements
• Screenshots and/or links to further information
• Discovered issues / questions (if there are any)
• Now what?
LOGISTICS FROM INFO SESSION
Participant Checklist

✔ Register on HL7 Event Page
✔ Sign up for Confluence Access
✔ Select a Track
✔ Complete Pre – Connectathon Survey
✔ Prepare your Technical Environment
✔ Sign up for chat.fhir.org Access
✔ Connect with your Track lead & participants
✔ Get the Whova App
About New Orleans

- Hilton New Orleans Riverside
- Riverwalk .2 miles away
- Bourbon Street and Jackson Square within a mile
- Parking is $44/self, $49/valet per day

- Louis Armstrong New Orleans International Airport (MSY) is about 25 minutes away, and the Amtrak station is a mile from the hotel. Shuttle transportation to/from the airport is available (fee applies).

- Weather Forecast:

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33rd HL7 FHIR Connectathon

- Saturday, May 6  9:00 AM to 5:00 PM CT
- Sunday, May 7  9:00 AM to 5:00 PM CT

- St. Charles Ball Room

- Break Out Sessions
- Education Sessions listed in Whova
Questions?

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