## Short Description

## Long Description
This project is intended to develop artifacts (FHIR implementation guides, code mappings, reference implementations, etc) to retrieve proof of insurance coverage information via FHIR when requested or shared by a Patient in order to create an electronic rendering of the insurance membership card within a digital application.

The objectives of this track are:
- Test the SMART Health Card/SMART Health Link use cases.
- Test and gather feedback on the Implementation Guide.
- Identify gaps or errors.

## Type
Test an Implementation Guide

## Call for participants
Patients, Providers, Insurance companies, App developers

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Email</th>
<th>Testing Role</th>
</tr>
</thead>
<tbody>
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<td>PHR/wallet/patient apps</td>
</tr>
<tr>
<td>Jason Teeple</td>
<td>Evernorth</td>
<td><a href="mailto:Jason.Teeple@evernorth.com">Jason.Teeple@evernorth.com</a></td>
<td>Payor/ server testing</td>
</tr>
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</table>

## Track Prerequisites
In advance of the Connectathon we would ask participants to attend the Implementers Connection Calls and have signed up for the track ahead of the deadline. It is critical to attend the calls and sign up by the deadline as we will be matching implementers to ensure that everyone has someone to test the below Scenarios. Testers are encouraged to review the CARIN IG For Digital Insurance Card SMART Health Links Use Case and are able to listen to a recording of a meeting walking through the use cases: https://leavittpartners.zoom.us/rec/share/z9hXTe2bpXvVFZs4tgM7AJ2Gko-yhAdl1HTC7T-wU27u2b3dY6Xk5jKt0ZbE5AAbS5paScA6V8m Passcode: %1I+ch6g

## Track Lead(s)
Mark Roberts Ryan Howells John Pollak

## Track Lead Email(s)
mark.roberts@leavittpartners.com; ryan.howells@leavittpartners.com; jc@thecommonsproject.org

## Specification Information
CARIN IG for Digital Insurance Card (PSS, STU1)

## Zulip stream
https://chat.fhir.org/#narrow/stream/285193-CARIN-IG.20for.20Digital.20Insurance.20Card
Track Kick-off Call: 12pm ET on Wednesday, June 21

Recording: https://leavittpartners.zoom.us/rec/share/VHkidUstlW6fJu-9R7zQD5dP0615nl4qQUlof1QsrSlqmV-1s4Ra5IFB5hRqAGFp6mFyLlipXv-rOfY
Passcode: S^ux@0!

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

<table>
<thead>
<tr>
<th>Touchpoint Call</th>
<th>Date</th>
<th>Time (All times ET)</th>
<th>Zoom</th>
<th>Recording</th>
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<tr>
<td>Touchpoint Call #1</td>
<td>Wednesday, June 28</td>
<td>12 pm</td>
<td><a href="https://leavittpartners.zoom.us/j/90674769177?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&amp;from=add-on">https://leavittpartners.zoom.us/j/90674769177?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&amp;from=add-on</a></td>
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<tr>
<td>Touchpoint Call #2</td>
<td>Wednesday, July 12</td>
<td>12 pm</td>
<td><a href="https://leavittpartners.zoom.us/j/90674769177?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&amp;from=add-on">https://leavittpartners.zoom.us/j/90674769177?pwd=Q2NwOURxY2tvb2l6R1g0TlBMVm5aUT09&amp;from=add-on</a></td>
<td>A recording of the call can be found here: <a href="https://leavittpartners.zoom.us/rec/share/-zC1Y8bNEqQuS0mPPM588mnJoqGlCJLw5kxWmaLZpI8UJ2wT55xWNOwL6LbGh5VnMfPjyW58mAu">https://leavittpartners.zoom.us/rec/share/-zC1Y8bNEqQuS0mPPM588mnJoqGlCJLw5kxWmaLZpI8UJ2wT55xWNOwL6LbGh5VnMfPjyW58mAu</a> Passcode: 1eqx17p=5</td>
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<td>Touchpoint Call #3</td>
<td>Friday, July 14</td>
<td>3 pm</td>
<td><a href="https://leavittpartners.zoom.us/j/94706529765?pwd=ZUU7Tw8tV1Y5Z2dGandYmnMMEx7zao0Mrom-add">https://leavittpartners.zoom.us/j/94706529765?pwd=ZUU7Tw8tV1Y5Z2dGandYmnMMEx7zao0Mrom-add</a> on</td>
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Agenda

Track Kick off Slides:

A recording of the session can be found here:
https://hl7-org.zoom.us/rec/play/H6sbFcv7VkLZRrUbL9NWYGO4LKaRBFhYj2ZATRMDLVkqadPbLpsBC9yZ9nrit02Ut7WiVhY_DE.EmvuULSticZqV4I

canPlayFromShare=true&from=share_recording_detail&startTime=1689793631000&componentName=rec-play&originRequestUrl=https%3A%2F%2Fhl7-org.com%2F%2Fshare%2FpsqDyV15DNSBxXN4Dp4_mrtWucy5c3%24B9Hl%2Fshare%2Fp%7EDMAd7QwvyxjX3_L%3FI%3FstartT%7D1689793631000

Track Report Out can be found here:

<table>
<thead>
<tr>
<th>July 19 (All times ET)</th>
<th>Start Time</th>
<th>End Time</th>
<th>Session Title</th>
<th>Session Description</th>
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</thead>
<tbody>
<tr>
<td>3:00 PM</td>
<td>3:05 PM</td>
<td>Welcome / Track Kick Off and Intro</td>
<td>Welcome and introduction to the track</td>
<td></td>
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<tr>
<td>3:05 PM</td>
<td>3:30 PM</td>
<td>CARIN Digital Insurance IG &amp; SHC/SHL Overview</td>
<td>An in-depth overview of the IG and proposed future updates</td>
<td></td>
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<tr>
<td>3:30 PM</td>
<td>4:00 PM</td>
<td>Ask the IG Leads Anything</td>
<td>Office hours to ask the IG leads questions</td>
<td></td>
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<tr>
<td>4:00 PM</td>
<td>5:00 PM</td>
<td>Testing</td>
<td>Testing of the proposed futures updates to the IG</td>
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<table>
<thead>
<tr>
<th>July 20 (All times ET)</th>
<th>Start Time</th>
<th>End Time</th>
<th>Session Title</th>
<th>Session Description</th>
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<tr>
<td>1:40 PM</td>
<td>2:00 PM</td>
<td>Track Highlight</td>
<td>A report out of the tracking testing session.</td>
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SMART Health Links

- Health care providers rely on manual, inefficient means to capture insurance information from patients
- Increasingly, this information is being captured via web-based, mobile app-based, and kiosk-based registration and check-in flows for patients

- In most of these flows, the patient is asked (or required) to input their insurance information by
  - Manually entering plan and policy information
  - Uploading photos of their card

- A SMART Health Link digital insurance card could make this easier, reduce errors, and facilitate faster eligibility checks

Workflow

- Insurer/data holder provides a digital insurance card to the individual as a SMART Health Link
  - e.g., Insurer prints SHL QR on physical card
  - e.g., Insurer emails or messages SHL QR to patient
  - e.g., Insurer hosts SHL and SHL QR through their online portal

- Individual stores or captures their SMART Health Link digital insurance card on their device
- Individual shares their SMART Health Link digital insurance card during in person or web-based registration/check-in flow for a new patient visit

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 check-in flow
  - Consume and validate SHL from QR code or link, display and confirm details

Shc-web-reader

A 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

A useful repository with sample SMART Health Links

https://github.com/seanno/shc-demo-data

Sample Cigna SMART Health Insurance Card

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?