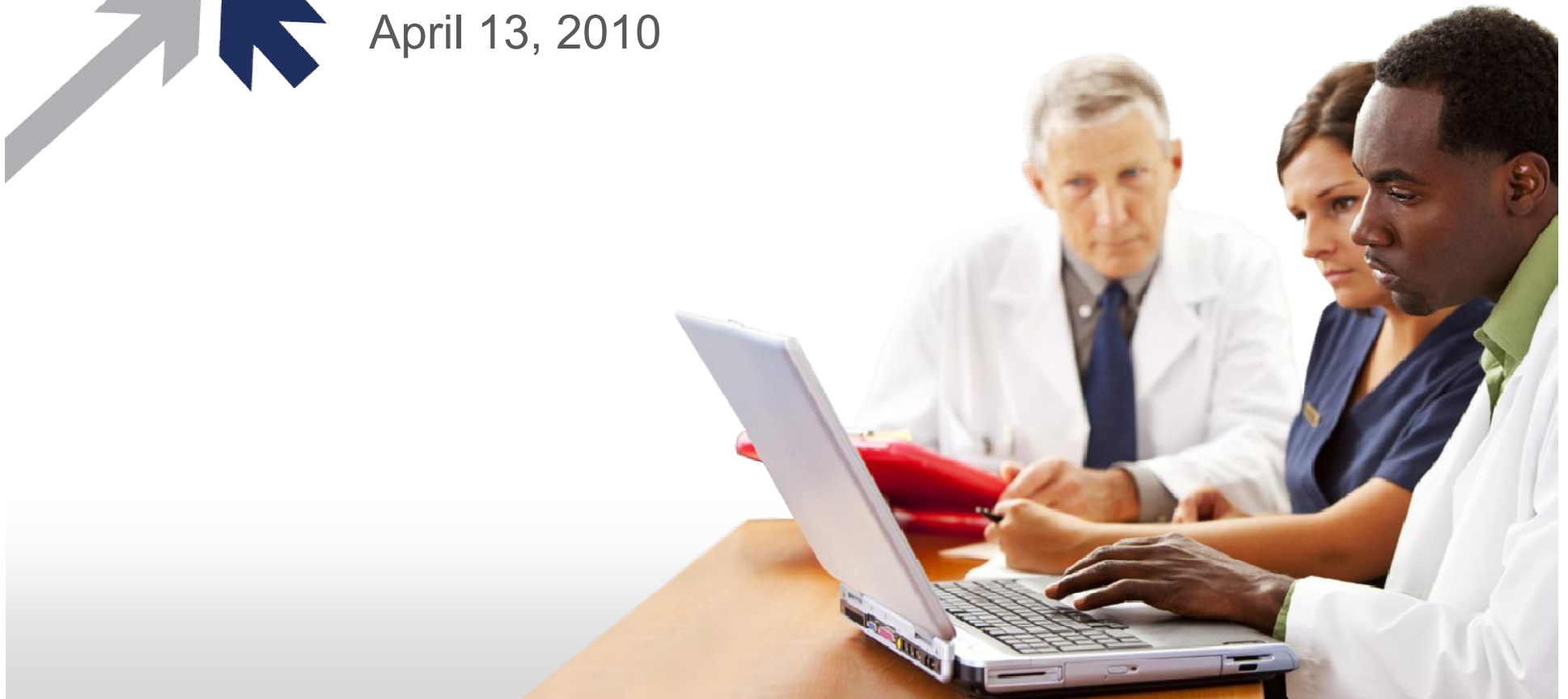
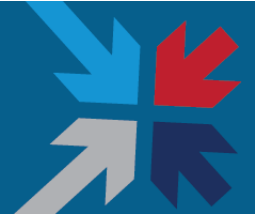


## NHIN Direct Implementation Group Meeting

April 13, 2010



# Agenda



- » Quick Summary of Last Meeting & Reminders

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- » WG Updates

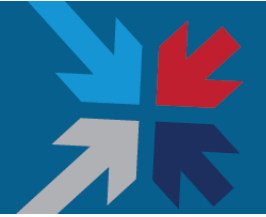
- » User Story Review
  - » Content Packaging
  - » Security & Trust
  - » Robust HIE Interoperability
  - » Individual Involvement
  - » Addressing
  - » Abstract Model
  - » Call for New Workgroups
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- » Calendar

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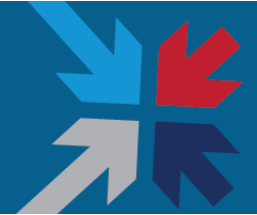
- » Next Steps



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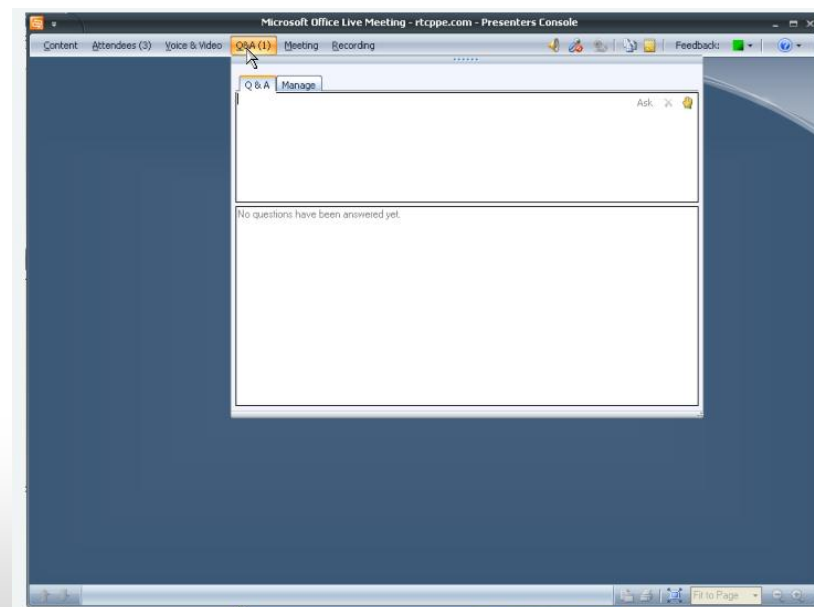


## Reminders & Quick Summary of Last Meeting

# Q&A Text Box Function



- » Use the Q&A text box function in the web conference to ask a question, or to signal an intent to speak
- » **To type a question**, please type questions into the Q&A text box and click 
- » **To vocalize a question**, please use the “raise your hand” function found in the upper right hand corner: 



# Review of WGs



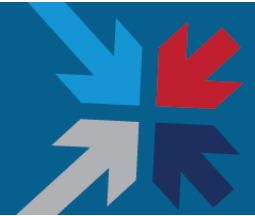
- » **User Story Review WG:** Provide consistent, vetted set of user stories available on the Wiki
- » **Content Packaging WG:** Define a few workable alternatives, with pros/cons, for content packaging
- » **Security & Trust WG:** Provide alternatives and highlight issues relating to security and trust enablement via technology (e.g., certificates and signatures)
- » **Robust HIE Interoperability WG:** Define how to mix and match direct transactions and robust HIE/NHIN specifications and services (patient discovery and information access) capabilities at scale
- » **Individual Involvement WG:** Clarify technology issues and policy implications for individual involvement in direct transport
- » **Addressing WG:** Define an implementation neutral mechanism for addressing that enables provider/individual identification and enabling organization routing
- » **Abstract Model Review WG:** Review and finalize a formal abstract model that all WGs can use to define common vocabulary

# Recap of Last Meeting



- » **User Story WG** Reviewed output of WG, including key stories, definition of story style guide and Must/Should cut points. Introduced Peter DeVault as the WG lead.
- » **Content Packaging WG** Reviewed the goals, objectives and framing issues from the first meeting. Introduced David McCallie as the WG lead.
- » **Security and Trust WG** Reviewed the goals, objectives and framing issues from the first meeting. Discussed policy assumption that data holder has already decided it is appropriate to transmit data. Introduced Jonathan Gershater as WG lead.
- » **Robust HIE WG** Reviewed the goals, objectives and framing issues from the first meeting.
- » **Individual Involvement WG** Reviewed the goals, objectives and framing issues from the first meeting. Introduced Richard Elmore as WG lead.
- » **Addressing WG** Reviewed the discussion around the concrete proposal for an addressing specification from the second meeting. Introduced Wes Rishel as WG lead.
- » **Abstract Model Review WG** Reviewed the goals of the Abstract Model, the next steps (including message status support and language cleanup) and the next steps (including finalizing language and gaining WG and IG consensus).

# Timeline Review



**LEGEND**

- Weekly teleconferences
- ★ Face to face meetings
- ★ We Are Here

# Deliverable Review



## Specifications & service descriptions including

- » Formalized models
- » Core specifications and service descriptions
- » Conformance testing scripts and conformance service
- » Reference implementation guides for edge systems and routing systems (including sample code, testing and conformance documentation, legal and policy documentation, etc...)
  - Implementation guide for CONNECT users



## Process recommendations

- » Use of NHIN Direct as a model (positive or negative)
- » Formalized modeling process recommendations

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## Policy recommendations

- » Recommendations on Federal role, states, etc...
- » Policy recommendations for trust enablement

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## Marketing/awareness

- » Core messaging
- » Placements in industry journals, key social media outlets, etc...

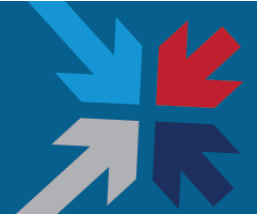


# Deliverable Tracker – April/May



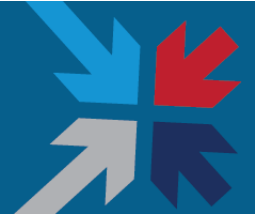
Deliverable	Description	Responsible Party	Status
<b>Key User Stories</b>	Provide a consistent, vetted set of User Stories	User Story WG	In Progress
<b>Content Container Specifications</b>	Define of a few workable alternatives for content packaging so that patient data of mixed types can be packaged and sent	Content Packaging WG	In Progress
<b>Security &amp; Trust Specifications</b>	Provide alternatives and issue relating to security and trust enablement via technology	Security & Trust WG	In Progress
<b>Robust HIE Service Description</b>	Provide a Service Description of how to mix and match direct transactions and robust HIE/NHIN specifications and services capabilities at scale	Robust HIE WG	In Progress
<b>Individual Involvement Service Description</b>	Provide a Service Description of how individuals can participate in NHIN Direct Services	Individual Involvement WG	In Progress
<b>Addressing Specification</b>	Provide a Specification on to effective addressing methods -- what is the health "email" address	Addressing WG	In Progress
<b>Abstract Model</b>	Provide a Diagram and Specification of an Abstract Model that all WGs can use to determine core architectural components, assumptions and terminology	Abstract Model WG	In Progress
<b>Edge Specification</b>	Provide a simple specification to allow EHR to send and receive content via enabling organization	Concrete Implementation WG	Not Started
<b>Routing Specification and Service Description</b>	Provide a specification and service description to cover routing between enabling organizations with the verification of signature based headers and explicit certified white lists	Concrete Implementation WG	Not Started

# Deliverable Tracker – June/July/Aug

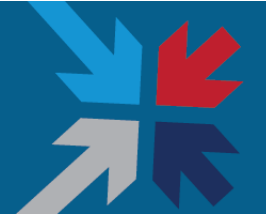


Deliverable	Description	Responsible Party	Status
<b>Interaction Model/Service Orchestration Model</b>	Provide Interaction Model and Service Orchestration Model for: 1) REST Implementation 2) SMTP Implementation 3) IHE Implementation	Abstract Model WG & Concrete Implementation WG	Not Started
<b>Core Specifications and Service Descriptions</b>	Provide core Specifications and Service Descriptions	Addressing, Content Packaging and Concrete Implementation WG	Not Started
<b>Conformance Testing Scripts and Conformance Service</b>	Provide one conformance UAT and service for each concrete implementation	Testing WG	Not Started
<b>Reference Implementation Guides</b>	Provide reference implementation guides for edge systems and routing systems (including sample code, testing and conformance documentation, legal and policy documentation, etc...)	Documentation WG	Not Started

# Deliverable Tracker – Sep/Oct/Nov



Deliverable	Description	Responsible Party	Status
<b>Core Messaging</b>	Undertake marketing efforts to craft and place NHIN Direct message in industry journals, key social media outlets, etc...	Internal Staff	Not Started
<b>Policy Recommendation</b>	Provide key policy recommendations	Internal Staff	Not Started
<b>Process Recommendations</b>	Provide process recommendations for the use of NHIN Direct as positive or negative	Internal Staff	Not Started

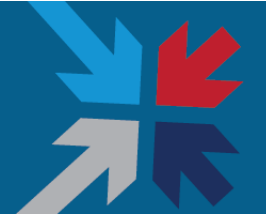


## Updates from the User Story WG

# Review of Meeting



- » Peter DeVault is WG lead
  
- » Work from meeting:
  - Clarified Must/Should distinction
  - Elevated individual involvement stories to Must
  - Discussed minimal IT story
  - Close to finalized Must list
  - We will clarify story process and Must/Should distinction on the wiki and add some additional Should/Could stories
  
- » More background in meeting notes
  - <http://nhindirect.org/User+Story+Meeting+2010-04-12>
  - <http://nhindirect.org/User+Story+Meeting+2010-04-05>
  - <http://nhindirect.org/User+Story+Meeting+2010-04-01>

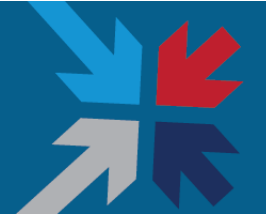


## Updates from the Content Packaging WG

# Review of Meeting



- » David McCallie is WG lead
- » Agreed on overall set of goals for content packaging (support for simple metadata with ability to scale up to use of XDS metadata)
- » Draft proposal created
  - <http://nhindirect.org/Content+Container+Specification>
- » More background in meeting notes
  - <http://nhindirect.org/Content+Packaging+WG+Notes+040710>
  - <http://nhindirect.org/Content+Packaging+Meeting+2010-03-31>



## Updates from the Security and Trust WG



# Review of Meeting

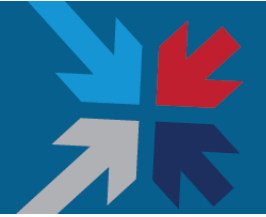


- » Jonathan Gershater is WG lead
  
- » Agreed on overall approach to express policy and trust agreements via the use of certificate-based signatures
  - Allows for expression of mutual trust, voluntary certification or common trust circles, and single Federal certification
  - Preserves strict separation between the details of the policy (out of scope for NHIN Direct technology) and the mechanism used to express policy agreement
  - Open issues about the organizational and level in which the trust assertion inheres
  - Only dealing now with transport-level trust issues, not payload level assurance or authorization

# Review of Meeting



- » Agreed that there should be at least one polling based option for Source/Destination (but that should not limit other concrete implementations)
  
- » More background in meeting notes
  - <http://nhindirect.org/Security+and+Trust+Meeting+2010-04-08>
  - <http://nhindirect.org/Security+and+Trust+Meeting+2010-04-01>

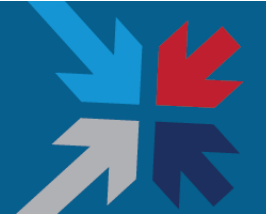


## Updates from the Robust HIE Interoperability WG

# Review of Meeting



- » Vassil Peytchev is WG lead
- » Clarified requirements of Abstract Model relevant to status and polling (reflected in updated Abstract Model)
- » Early proposal to use XDS Metadata as the common link (reflected in early draft Content Container Specification)
- » More background in meeting notes
  - <http://nhindirect.org/Robust+HIE+Meeting+Notes+040610>
  - <http://nhindirect.org/Robust+HIE+Meeting+2010-04-01>

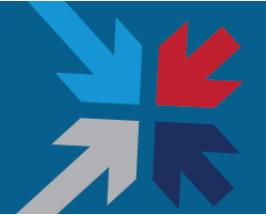


## Updates from the Addressing WG

# Review of Meeting



- » Wes Rishel is WG lead
  
- » Updated addressing specification to clarify intent of specification vs. non-normative formatting of an addressing, removed primacy of URN specification
  - Updated specification at <http://nhindirect.org/Addressing+Specification>
  - Will call for consensus at WG level on Wednesday for call to Implementation Group level by next meeting
  
- » More background in meeting notes
  - <http://nhindirect.org/Addressing+WG+Notes+04072010>
  - <http://nhindirect.org/Addressing+Meeting+2010-03-31>



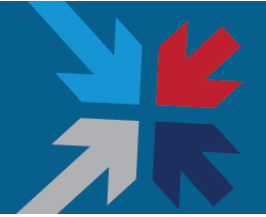
## Updates from the Individual Involvement WG

# Review of Meeting



- » Richard Elmore is WG lead
  
- » During Last Meeting the WG:
  - Recommended individual involvement stories tied to meaningful use be Must
  - Clarified implications of individual involvement needs for content packaging
  - Clarified asymmetric trust issue for individuals (easier to assess
  
- » More background in meeting notes
  - <http://nhindirect.org/Individual+Involvement+Meeting+2010-04-08>





## Updates from the Abstract Model Review WG

## Action Items – First an Overview

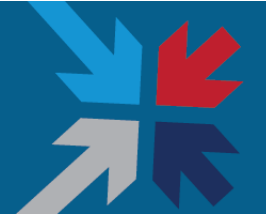


- » Brett Peterson is WG lead
- » Abstract Model's goal is to provide an implementation-agnostic expression of the transactions between actors implied by user stories
- » In other words, a common frame of reference and terminology on which concrete implementation ideas may be mapped
  - Makes no implication about one versus many mappings
- » Currently modeled as three “legs”
  - Source to HSP
  - HSP to HSP
  - HSP to Destination
- » Does not make any assumptions about how the responsibilities are deployed (i.e., an HSP is not, by definition, a separate org from a Source, but it could be)
- » See <http://nhindirect.org/NHIN+Direct+Abstract+Model>

# Call for Consensus



- » The NHIN Direct Abstract Model WG is issuing a call for consensus on the content of NHIN Direct Abstract Model version 1.1.
  - At this stage of NHIN Direct development, the Abstract Model is intended only to provide a common set of terminology and a common frame of reference (rooted in User Stories) on which other WGs may base their discussions
  - The Abstract Model WG expects that the Abstract Model will change based on concrete interoperability decisions made over the next several months
  - This Implementation Group call for consensus is a request to verify that the current common set of terminology and common frame of reference are adequate to assist with continued forward progress in the NHIN Direct effort
- » Review Abstract Model and vote:
  - <http://nhindirect.org/NHIN+Direct+Abstract+Model>
  - Only organizations that have consented to public listing are included for voting, if you don't see your name listed but would like to be publicly listed, please email [hburnett@deloitte.com](mailto:hburnett@deloitte.com)



Call for a New WG

# Concrete Implementation



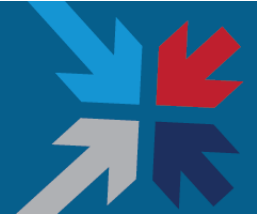
## » Goal

- Recommend a high level concrete implementation or set of concrete implementations mapping to the abstract model and meeting all Must User Stories

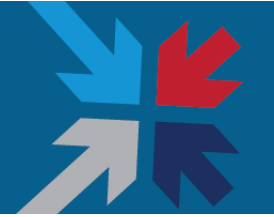
## » Framing Issues

- Follow the recommendations (or request changes) of the Abstract Model, Addressing and Content Packaging WGs
- Meet the Must recommendations of the User Story WG
- Follow the input of the Robust HIE WG how concrete implementations should work with robust HIE services
- Balance the feedback and needs of:
  - Simplicity (argues for only one concrete implementation)
  - Supporting existing IHE specs and preserving at least one polling-based Source/Destination implementation
- Consider as input existing REST, SMTP and IHE straw cases

# Future WGs

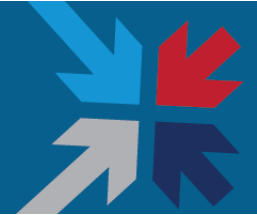


- » Testing
- » Implementation Geographies
- » Documentation



## Calendar

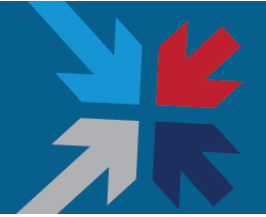
# WG Schedule



- » WGs adhere to the below schedule, meeting via teleconference on a weekly basis

WG	Meeting Time
User Story Review WG	Mondays 11am-12pm EST
Content Packaging WG	Wednesdays 1pm-2pm EST
PKI/Certificates WG	Thursdays 2pm-3pm EST
Robust HIE Interoperability WG	Tuesdays 2pm-3pm EST
Individual Involvement WG	Thursdays 1pm-2pm EST
Addressing WG	Wednesdays 3:30pm-4:30pm EST
Abstract Model Review WG	Wednesdays 11am-12pm EST





## Next Steps