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August 19, 2025

RCE™ Monthly Information Call

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- Welcome & Agenda
- ASTP and Social Security Administration (SSA) Welcome Remarks
- TEFCA Exchange Basics
- Recognized Coordinating Entity® (RCE®), Updates
- Status Update: Draft Qualified Health Information Network® (QHIN™) Technical Framework (QTF) Version 2.1 (QTFv2.1)
- Draft Government Benefits Determination Standard Operating Procedure (SOP) Overview
- Public Call for Subject Matter Experts
- Educational Resources
- Q & A





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Office of Disability Policy
Social Security Administration



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TEFCA Exchange Basics



**Framework
Agreements**



**Standard
Operating
Procedures**



**Technical
Requirements**



**RCE
Directory**



**Oversight &
Compliance**

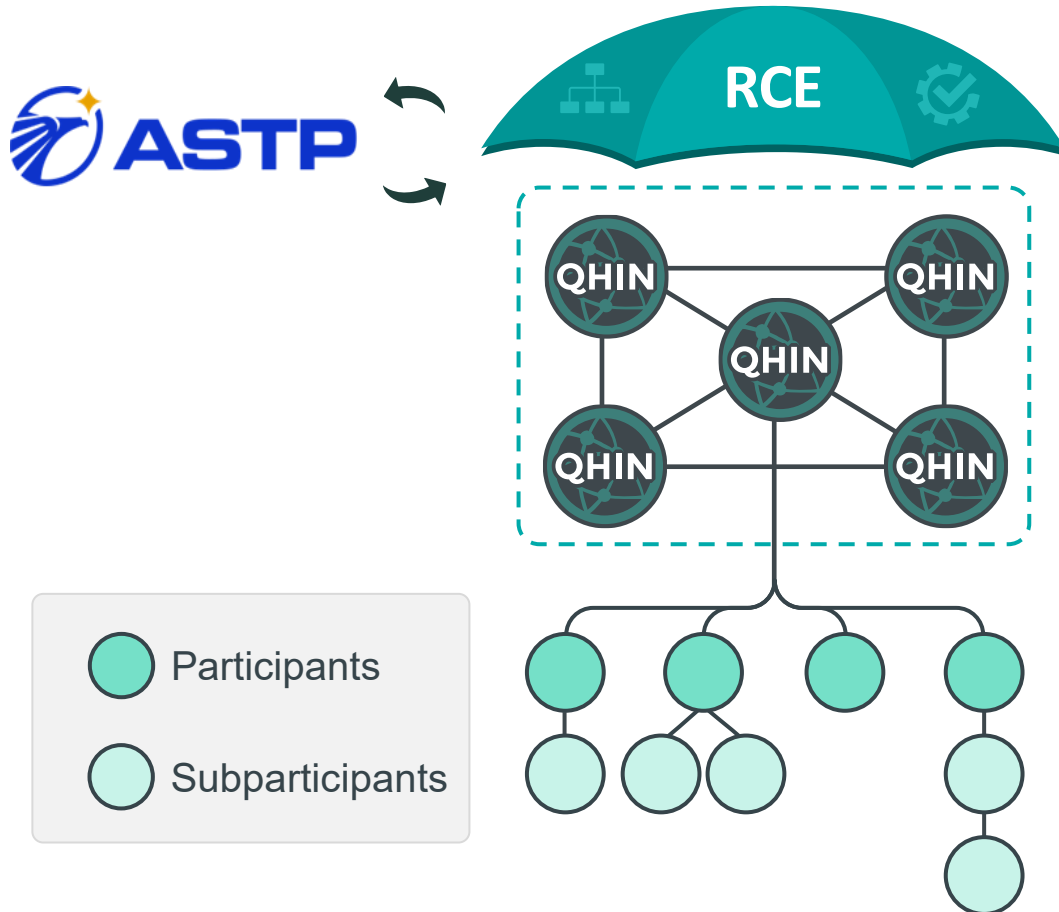


Governance

Need the basics? Check out the TEFCA Guide:

https://rce.sequoiaproject.org/wp-content/uploads/2024/10/TEFCA-Guide-September-2024_508.pdf

Exchange Under TEFCFA



ASTP defines overall policy and certain governance requirements

RCE provides oversight and governing approach for QHINs

QHINs connect directly to each other to facilitate nationwide interoperability

Each QHIN connects Participants, which connect Subparticipants

Participants and Subparticipants connect to each other through TEFCFA Exchange

- Participants contract directly with a QHIN and may choose to also provide connectivity to others (Subparticipants), creating an expanded network of networks
- Participants and Subparticipants sign the same Terms of Participation and can generally participate in TEFCFA Exchange in the same manner



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Recognized Coordinated Entity (RCE) Updates



THE NUMBERS ARE IN

TEFCA Exchange is Ramping Up!

There are 9,412 organizations live on TEFCA (QHINs, Participants, and Subparticipants) representing over 44,000 unique connections to clinicians, hospitals, clinics, post-acute care/long-term care facilities, public health authorities, and more. [See our TEFCA Map.](#)

More than 39 **million documents shared** since go-live in December 2023.



ASTP and The Sequoia Project Designate Netsmart as QHIN



TEFCA™ Expands as RCE Continues To Onboard QHINs and Grow Nationwide Health IT Interoperability, Now Connecting More Than 9,000 Organizations Nationwide

Meet the QHINs



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eClinicalWorks

eHealth Exchange™



Candidate QHIN(s)

ORACLE Health
Information Network, Inc.™

[Learn More: https://rce.sequoiaproject.org/designated-qhins/](https://rce.sequoiaproject.org/designated-qhins/)



Trusted Organizations Participating in TEFCA

- This beta search tool offers a map view of TEFCA participation, enabling searches by name, address, or zip code to find over 41,000 Participant and Subparticipant locations (as of August 6, 2025), including multiple entries for organizations with several sites



SEARCH

View all organizations

Reset Search

If you are a TEFCA Participant or Subparticipant and have questions about your listing in this map, please contact your QHIN for assistance.



HealthITbuzz

THE LATEST ON HEALTH IT FROM ASTP

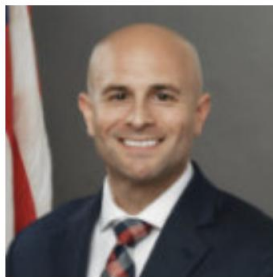


Health IT Buzz > TEFCA > **TEFCA's growing, are you in? Take a look at who's participating in TEFCA Exchange**

TEFCA

TEFCA's growing, are you in? Take a look at who's participating in TEFCA Exchange

Steven Posnack and Jawanna Henry | AUGUST 6, 2025



We are pleased to announce that the beta version of an **interactive, searchable map** for TEFCA™ participation is now available. The map released today is another example of our **commitment to transparency**.

✕ Post

f Share

in Share

✉ Email



Governance Body	Last Meeting	Next Meeting
Participant/Subparticipant Caucus <ul style="list-style-type: none">Chair: Amy Bagge-Smith, Zus HealthVice Chair: Kara Justi, Cleveland Clinic	July 25	August 22
QHIN Caucus <ul style="list-style-type: none">Chair: Liz Lewis, CommonWell HealthVice Chair: Matt Doyle, Epic Nexus	August 14	August 28
TEFCA Governing Council <ul style="list-style-type: none">Chair: Matthew Eisenberg, MD, Stanford HealthVice Chair: John Blair II, MD, MedAllies	August 15	August 22

The TEFCA Cybersecurity Council continues to meet on a regular basis



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QHIN Technical Framework (QTF) Draft Version 2.1 Review



Why These Updates?

- Support directed queries for any Exchange Purpose (XP), including:
 - Government Benefits Determination
 - Health Care Operations
 - Payment
- Improve transparency and reporting on exchange volumes
- Gather broad stakeholder feedback to ensure TEFCA Exchange remains responsive to community needs



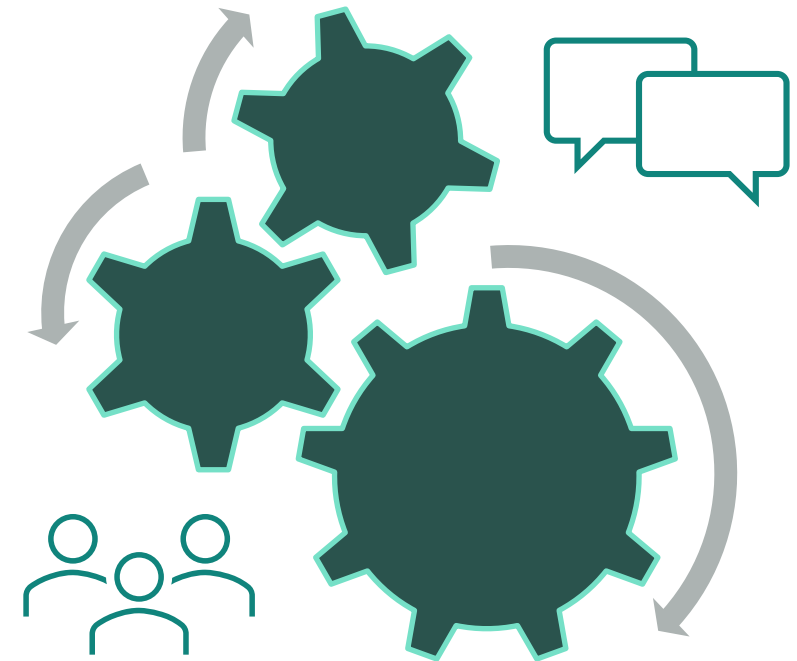
What Will This Enable?

- Queries to be sent to specific Participants or Subparticipants to limit extraneous responses
- Enhanced QHIN reporting by requiring monthly exchange volumes to be broken down by Exchange Purpose
- Stronger, more responsive TEFCA Exchange Framework



Status Update

- **Released:** July 7, 2025
- **Public Feedback Period:** July 7 – July 28, 2025
- **Current Status:** Feedback under review by the RCE with the Technical Workgroup
- **Next Steps:** The RCE will consolidate and share feedback with ASTP





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Draft Government Benefits Determination Standard Operating Procedure (SOP) Overview



What is the TEFCA Government Benefits Determination Exchange Purpose?

The Government Benefits Determination Exchange Purpose is one of the six authorized Exchange Purposes under the TEFCA framework. This enables federal, state, local, or tribal government agencies to request and receive health information to make determinations about an individual's eligibility for non-healthcare related government benefits, such as Social Security disability benefits. The exchange of this information is required to be consistent with the HIPAA Privacy Rule and other applicable laws.

- The RCE is seeking feedback on the **draft Government Benefits Determination Exchange Purpose Standard Operating Procedure (SOP) and draft Exchange Purposes SOP v4.1**, released on Monday August 18, 2025.
- Feedback will be accepted until **September 17th at 11:59 p.m. ET**.
- Feedback can be submitted through email to rce@sequoiaproject.org or through the online form.

Draft Government Benefits Determination Exchange Purpose SOP Feedback

Name (Required)

First Last

Email (Required)

Organization (Required)

Organization URL

https://

Section 2: SOP Definitions



Applicability: QHINs, Participants, Subparticipants

SOP Section	Purpose
Section 1 Common Agreement References	This section of the SOP is standard across all SOPs and notes that the Common Agreement is the foundation for the policies in the SOP.
Section 2 SOP Definitions	Includes any new definitions introduced in the SOP, as well as existing definitions referenced from other framework agreement documents.
Section 3 Purpose	Outlines the purpose, scope, key elements of the SOP.
Section 4 Government Benefits Determination (T-GOVDTRM)	Defines the Government Benefits Determination (GBD) use case and specifies details on the XP Code, permitted users, and transaction requirements.
Section 5 Social Security Determination (T-GOVDTRM-SSD)	Defines the Social Security Determination (SSD) use case and specifies details on the XP Code, permitted users, and transaction requirements.



This SOP identifies implementation specifications that QHINs, Participants, and Subparticipants must follow when asserting the Government Benefits Determination (GBD) Exchange Purpose (XP), including the Social Security Determination (SSD) sub-Exchange Purpose (sub-XP).

- **Government Benefits Determination XP:** Allows government entities at the federal, state, local, or tribal level to determine an Individual's eligibility for non-healthcare government benefits (e.g., Social Security disability benefits), in accordance with Applicable Law.
- **The Social Security Determination XP:** Enables the Social Security Administration (SSA) to query and retrieve medical records to support two programs that provide benefits based on disability: the Social Security Disability Insurance program (title II of the Social Security Act (Act)) and the Supplemental Security Income (SSI) program (title XVI of the Act).

Only the SSA is permitted to Query under the specific SSD sub-XP Code but QHINs, Participants, and Subparticipants that are eligible to initiate requests in support of Government Benefits Determinations may assert the general GBD XP for other allowable GBD purposes, provided the requirements in this SOP are met.

Exchange Purposes (XPs)



- Every transaction that occurs via TEFCA Exchange MUST include the XP Code that represents the reason for why the transaction is being initiated
- Each of the authorized XPs may also have specific use cases that are identified with their own XP Code
- The XP codes for more specific use cases will begin with the same characters as the broader XP

Authorized XP	XP Code
Government Benefits Determination	T-GOVDTRM
Social Security Determination	T-GOVDTRM-SSD
Access Consent Policy	T-GOVDTRM-ACP



The Exchange Purposes SOP Version 4.0 serves as the reference document for all current XP SOPs.



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Government Benefits Determination (T-GOVDTRM)



Permitted users for purposes of this SOP include QHINs, Participants, and Subparticipants that are authorized by Applicable Law and the Framework Agreements to assert the Government Benefits Determination Exchange Purpose, as further specified below.

- **4.1 Exchange Purpose Code (XP Code)**
 - » All TEFCA Exchange under GBD MUST use the XP Code T-GOVDTRM when any of its sub-XP Codes, as further defined in the SOP, are not applicable.
- **4.2 QHIN Technical Framework (QTF)**
 - » All TEFCA Exchange under GBD MUST follow technical requirements as specified in the QTF



- **4.3 Definition**

- » TEFCA Exchange under the XP Code T-GOVDTRM means a determination made by any agency, instrumentality, or other unit of the federal, State, local, or tribal government as to whether an Individual qualifies for government benefits for any purpose other than health care (e.g., disability benefits) to the extent permitted by Applicable Law. Disclosure of TEFCA Information for this purpose may require an authorization that complies with Applicable Law.



4.4.1. QHIN Message Delivery

- » This SOP supports TEFCA Exchange in the form of a Message Delivery for T-GOVDTRM from any Initiating Node, as authorized by Applicable Law and the Framework Agreements, to any Responding Node that is listed in the RCE Directory Service as capable of receiving Message Deliveries. Further requirements for initiating a Message Delivery are in the QTF.

- **4.4.2. QHIN Query**

- » This SOP supports TEFCA Exchange in the form of a QHIN Query.

- **4.4.2.1 QHIN Query Request**

- a. Only Initiating Nodes that are authorized by Applicable Law and the Framework Agreements to assert the Government Benefits Determination Exchange Purpose may Query for T-GOVDTRM.

- **4.4.2.2 QHIN Query Response**

- a. Responding Nodes SHOULD Respond to Queries for T-GOVDTRM in accordance with Framework Agreements and Applicable Law.



4.4.3. FHIR

- This SOP supports TEFCA Exchange in the form of FHIR between Nodes with FHIR Endpoints published in the RCE Directory Service. FHIR refers to the Health Level Seven (HL7®) Fast Healthcare Interoperability Resources® (FHIR) standard.
 - » **4.4.3.1 FHIR Push**
 - Any Initiating Node may initiate a FHIR Push to any other Responding Node, in accordance with Applicable Law.
 - » **4.4.3.2 FHIR Query**
 - Only Initiating Nodes that are authorized by Applicable Law and the Framework Agreements to assert the Government Benefits Determination Exchange Purpose may Query for T-GOVDTRM.
 - » **4.4.3.3 FHIR Response**
 - Responding Nodes SHOULD Respond to Queries for T-GOVDTRM, in accordance with Framework Agreements and Applicable Law.



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Social Security Determination (T-GOVDTRM-SSD)



- The Social Security Administration (SSA) administers two programs that provide benefits based on disability:
 - » the Social Security Disability Insurance program (title II of the Social Security Act (Act)) and;
 - » the Supplemental Security Income (SSI) program (title XVI of the Act).
- SSA is allowed to query and retrieve the disability claimant's medical evidence under 20 CFR § 404.1512, 20 CFR § 404.1513, 20 CFR § 404.1514 from treating sources using the SSA-827 Authorization to Disclose Information to the Social Administration under sections 205(a), 223(d), 1614(a), and 1631(d) of the Social Security Act, as amended.

**SSA will pre-coordinate with organizations before initiating a query.
Pre-coordination will include discussion of fees.**

Section 5: Social Security Determination (SSD)



- **5.1 Exchange Purpose Code (XP Code)**
 - a. All TEFCA Exchange under Social Security Determination **MUST** use the XP Code T-GOVDTRM-SSD and XP Code T-GOVDTRM-ACP for related consent assertions.
- **5.2 QHIN Technical Framework (QTF)**
 - a. All TEFCA Exchange under SSD **MUST** follow technical requirements as specified in the QTF.
- **5.3 Definition**
 - a. T-GOVDTRM-SSD means TEFCA Exchange initiated by the United States Social Security Administration, or its Delegate(s), for the purposes of data collection to support Social Security Disability Insurance and Supplemental Security Income determinations.

Section 5: Social Security Determination (SSD)



5.4 Transactions

- **5.4.1. QHIN Message Delivery**

- a. Not applicable

- **5.4.2. QHIN Query**

- » This SOP supports TEFCA Exchange in the form of a QHIN Query for T-GOVDTRM-SSD.

- 5.4.2.1 QHIN Query Request**

- a. Only Initiating Nodes controlled by the Social Security Administration (SSA) or their Delegates may initiate Queries under the XP Code T-GOVDTRM-SSD, in accordance with the Framework Agreements, applicable SOPs, and Applicable Law.
 - b. SSA MUST coordinate with Responding Nodes and relevant TEFCA connections prior to sending Queries to determine interest and readiness to participate in the SSD sub-XP.
 - c. Initiating Nodes MUST use the QTF Patient Discovery Alternate Flow 1: Querying Specific Organization(s) to send directed Patient Discovery queries to Responding Nodes.
 - d. Patient Discovery Query Request
 - i. The Initiating Node MUST identify the HomeCommunityID of the Responding Node for directed Patient Discovery Query request using the Initiating QHIN Directory Service.
 - ii. Queries MUST include the Initiating Node's HomeCommunityID
 - iii. An Initiating Node MAY include a Social Security Number, as available
 - e. The Initiating Nodes MUST assert an Access Consent using the flow described in QTF Patient Discovery *Alternate Flow 2: Initiating Node asserts an Instance Access Consent Policy or Access Consent Policy.*

Section 5: Social Security Determination (SSD)



» 5.4.2.2 Access Consent Policy

- a. Responding Nodes in 5.4.2.1. MUST retrieve and store the asserted Access Consent Policy using the flow described in QTF Patient Discovery *Alternate Flow 2: Initiating Node asserts an Instance Access Consent Policy or Access Consent Policy*.
- b. Responding Nodes MUST retrieve the patient's authorization/consent using the XP Code T-GOVDTRM-ACP.

» 5.4.2.3 QHIN Query Response

- a. All Responding Nodes MUST Respond to QHIN Queries for T-GOVDTRM-SSD Code that contain the information specified in this SOP, in accordance with the Framework Agreements and Applicable Law.
- b. All Responding Nodes MUST Respond with the appropriate clinical content, as determined through coordination with the SSA prior to the QHIN Query, using the Implementation Guide in Table 1. *(see next slide)*

Section 5: Social Security Determination (SSD)

Table 1 SSD Implementation Guide

Exchange Purpose	Implementation Guide
Social Security Determination (SSD)	<u>Social Security Administration Electronic Health Document Implementation Guide For A Healthcare Participant, Version 5.0</u>



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Public Call for Subject Matter Experts (SMEs)



- The RCE is launching an open call for individuals interested in TEFCA implementation development to share their expertise as we continue to refine TEFCA, such as changes to existing SOPs or the development of new SOPs.
- Our goal is to identify subject matter experts (SMEs) who can make themselves available on short notice to participate in specific, time-limited workstreams over the course of the next year.
- This will provide a pathway for interested parties to engage with us and our governance bodies even if they are not yet participating in TEFCA (such as if the Exchange Purpose (XP) they are interested in is not yet operational).
- We are interested in hearing from a range of SMEs from a variety of organizations (e.g., providers, payers, public health, consumers/caregivers, technology vendors, and health information exchanges, etc.), and with varied subject matter expertise (e.g., health care operations, payment, public health, privacy, individual access services, security, and standards implementation, etc.).
- **If you are interested in participating, please fill out the webform by 11:59pm on Thursday, September 4.**



Please note that signaling your interest in participating in future workstreams does not guarantee that you will be called on to participate.



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Educational Resources



5 New and Updated FAQs Released!

- How does TEFCA address “minimum necessary” requirements under HIPAA?
- Will the RCE or ASTP have access to electronic personal health information (ePHI) shared via TEFCA?
- Who can query for information under the **Public Health Exchange Purpose**?
- The **Public Health Exchange Purpose** Implementation SOP includes a provision on Alternate Uses (Section 5.4) that states “Information transacted under the Public Health Exchange Purpose MUST NOT be persisted or used by any Node along the transaction chain that is not the addressed recipient, unless agreed to by the data source or recipient through a specific written agreement or as needed for a required audit as specified in the QTF.” Why doesn’t the provision require both the data source and the recipient to agree to a third party being able to Use Public Health data transacted via TEFCA?
- Are fees allowed in TEFCA?

These Frequently Asked Questions address common questions and will be updated regularly:

- **What is TEFCA?**
- **How Does TEFCA Work?**
- **How Do I Participate in TEFCA Exchange?**
- **How is TEFCA Governed?**
- **How are QHINs Designated?**

<https://rce.sequoiaproject.org/rce/faqs/>

Additional TEFCA Resources from ASTP:

<https://www.healthit.gov/topic/interoperability/policy/trusted-exchange-framework-and-common-agreement-tefca>

RCE Resource Library

TEFCA is a multifaceted, living framework that enables seamless and secure nationwide exchange of health information.

GETTING STARTED



Below is a guide to the Common Agreement, Standard Operating Procedures (SOPs), technical documents, and other resources that make up TEFCA's rules of the road. Start your journey to next generation interoperability here.

<https://rce.sequoiaproject.org/tefca-and-rce-resources/>

Additional Resources:

<https://www.healthit.gov/tefca>

All Events Registration and Recordings:

<https://rce.sequoiaproject.org/community-engagement/>

**Next RCE Monthly
Information Call**

September 16 | 12:00-1:00pm ET



Questions & Answers

For more information:
rce.sequoiaproject.org