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July 21, 2026

RCE™ Monthly Information Call

Speakers:

Mariann Yeager, RCE Program Lead

Chantal Worzala, RCE Stakeholder Engagement Lead

Today's Agenda

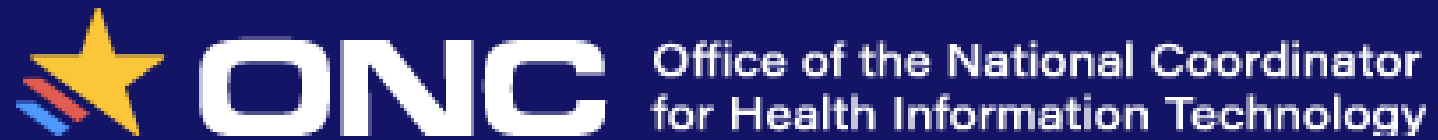


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- Agenda Review
- ONC Welcome
- TEFCA by the Numbers
- TEFCA Exchange Basics
- TEFCA Look-Back
- Educational Resources
- Q&A



TEFCA Trusted Exchange Framework
and Common Agreement™



Steve Posnack
Principal Deputy National Coordinator for Health IT
Office of the National Coordinator for Health IT

ONC Announces One Billion Health Records Exchanged via TEFCA



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U.S. Department of
Health and Human Services

Enhancing the health and well-being of all Americans

HHS EXPANDS SECURE ACCESS TO HEALTH RECORDS THROUGH THE TEFCA[®] NETWORK, ANNOUNCES MILESTONE OF ONE BILLION HEALTH RECORDS EXCHANGED

WASHINGTON—JUNE 26, 2026—The Office of the National Coordinator for Health Information Technology (ONC) at the U.S. Department of Health and Human Services today announced new steps to strengthen the Trusted Exchange Framework and Common Agreement[™] (TEFCA[®]), the nationwide network that helps patients and healthcare providers securely share electronic health information.

<https://www.hhs.gov/press-room/onc-strengthens-tefca-one-billion-health-records-exchanged.html>

Proposed Update to the Directory Service Requirements Policy SOP



Proposed Requirement: Improve the consistency, accountability, and reliability of information maintained in the RCE Directory Service by requiring each Directory entry to be associated with a **Federal Employer Identification Number (FEIN)** assigned by the Internal Revenue Service (IRS).

Use of FEINs

- FEINs provide a **non-personal tax identifier** that can be used to associate Directory entries with the legal or tax-reporting persons or entities responsible for them.
- The same FEIN may appropriately be associated with **multiple Directory entries** where those entries are legally, operationally, or tax-reporting attributable to the same person or entity.

Key Clarifications

- Social Security Numbers (SSNs) and Individual Taxpayer Identification Numbers (ITINs) are individual taxpayer identifiers and would **not** be appropriate for publication through the Directory
- FEINs are **not** intended to be a proxy for vetting status, HIPAA Covered Entity status, Health Care Provider status, or legal-entity separateness.
- A FEIN should **not** be selected merely because it is associated with some narrower component, subunit, department, service line, billing arrangement, payer enrollment, cost center, or other portion of a broader Directory entry, unless that narrower component is itself the Directory entry.

Comments are due July 28, 2026 (*Proposed revisions to Section 4.1.13 of the Directory Requirements SOP Version 1.2*)



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TEFCA by the Numbers



THE NUMBERS ARE IN

TEFCA Exchange is Ramping Up!

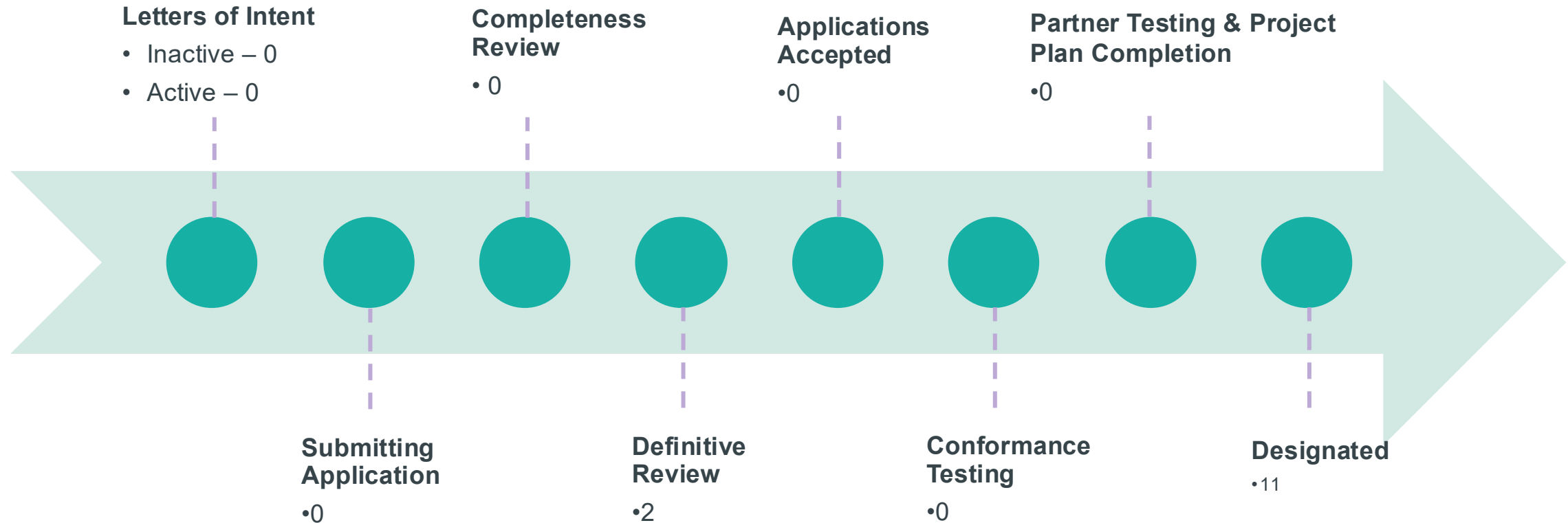
There are more than 21,000 organizations live on TEFCA (QHINs, Participants, and Subparticipants) representing over 96,000 unique connections to clinicians, hospitals, clinics, post-acute care/long-term care facilities, public health authorities, and more. [See our TEFCA Map.](#)

More than **1.2 billion documents shared** since go-live in December 2023.

QHIN Application and Onboarding & Designation



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Meet the QHINS



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eClinicalWorks

eHealth Exchange™



Learn more: <https://rce.sequoiaproject.org/designated-qhins/>



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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



ONC defines overall policy and certain governance requirements

RCE provides oversight and governing approach for the Qualified Health Information Networks (QHINs)

QHINs connect directly to each other to facilitate nationwide interoperability

Each QHIN connects Participants, which connect Subparticipants

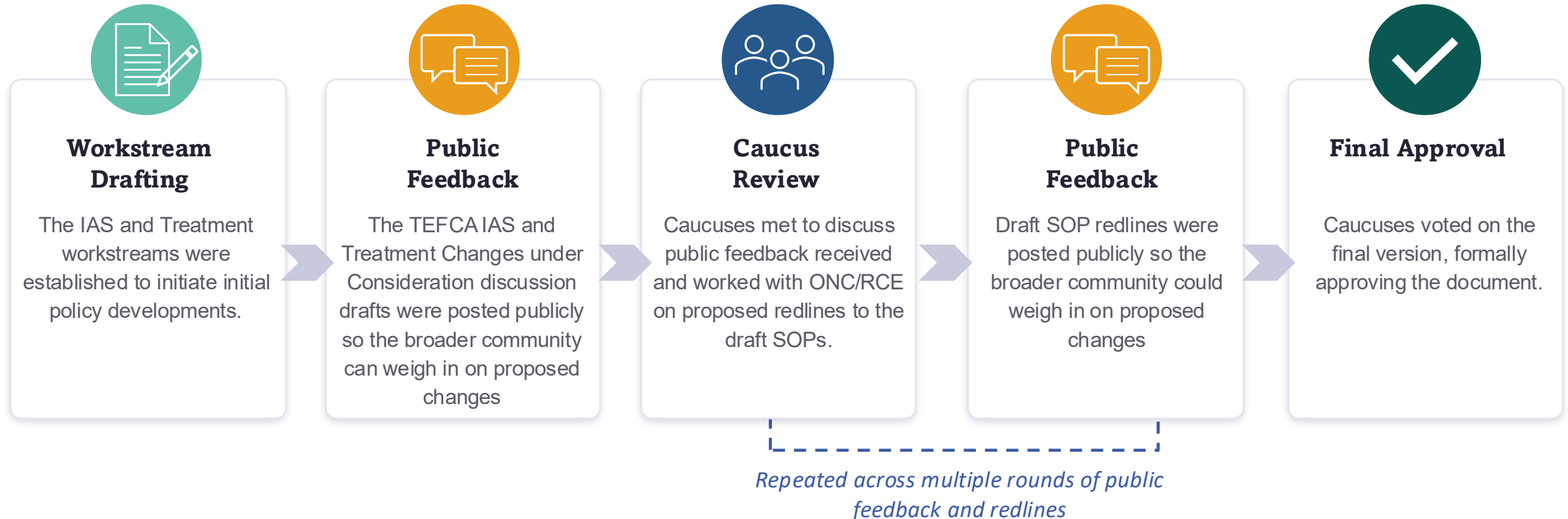
Participants and Subparticipants connect to each other through TEFCA Exchange

- 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 TEFCA Exchange in the same manner

Document Review & Approval Process

Recently Approved SOPs:

- TEFCA IAS XP Implementation SOP Version 3.0
- Treatment XP Implementation SOP Version 2.0
- Vetting Process XP SOP Version 2.0
- Exchange Purposes SOP Version 5.1



What's Next?



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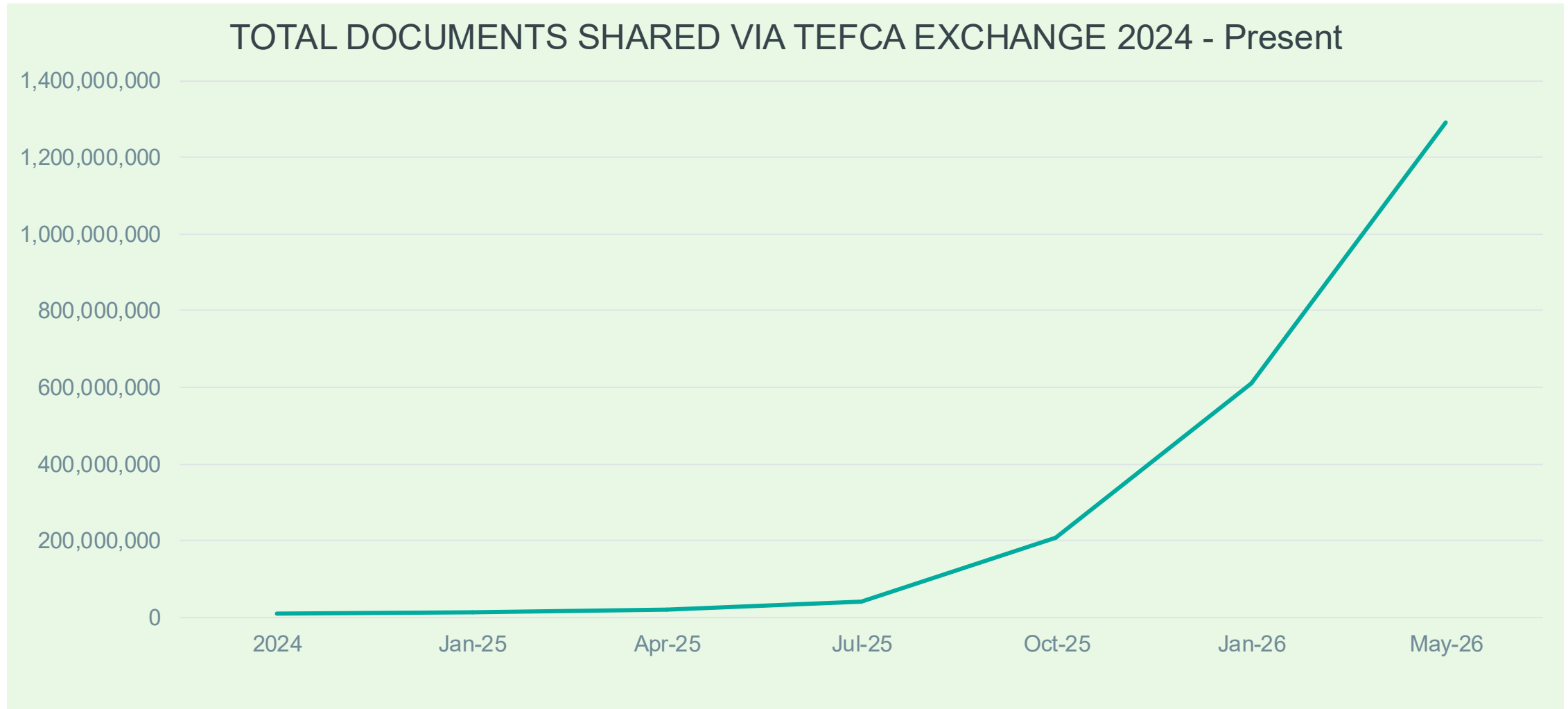
SOP	Summary Description of Changes/SOP	Expected for Topics in Change Management
Draft RCE Directory Service Requirements Policy SOP <i>Version 1.2</i>	Requires each Directory entry to be associated with a Federal Employer Identification Number (FEIN) assigned by the Internal Revenue Service (IRS).	July 14-28
Draft Inquiries and Investigations SOP <i>Version 1.0</i> <i>New SOP</i>	Describes the process that parties may use to escalate questions about a QHIN's compliance with the Common Agreement, the SOPs, and the QTF and provides the process that the RCE will use to investigate matters of potential non-compliance.	Late Summer 2026
Draft Restricted Participation List SOP <i>Version 1.0</i> <i>New SOP</i>	Provides transparency into which QHINs, Participants, or Subparticipants have been inactivated, suspended, or terminated for non-compliance with the terms of the Framework and prevents them from being re-activated unless they are removed from the List.	Late Summer 2026



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TEFCA Look Back

TEFCA's Rapid Growth

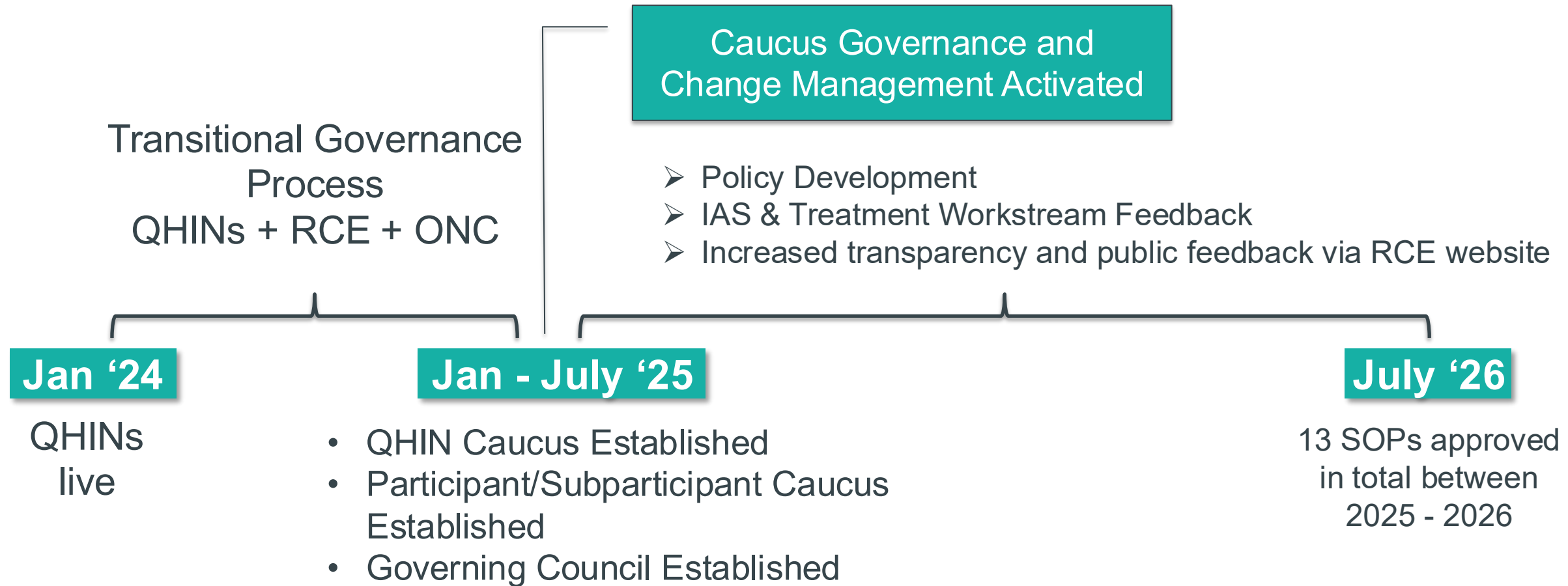


Document exchange has grown from 10 million in 2024 to more than 1.29 billion by May 2026.

TEFCA Governance Established



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Participatory Governance Engages the Community



**Cybersecurity
Council:**
4 meetings

**FHIR Advisory
Group (FHIAG):**
15 meetings

**QHIN Technical
Working Group
(TWG):**
25 meetings

**Treatment
Workstream:**
5 meetings

**IAS
Workstream:**
6 meetings

**IAS Breach
Mitigation
Subgroup:**
2 meetings

**Governing
Council:**
10 meetings

**Participant /
Subparticipant
Caucus:**
13 meetings

QHIN Caucus:
25 meetings

Joint Caucus:
12 meetings

117 Meetings Conducted Across TEFCA Governance in 2025 - 2026

Standard Operation Procedures (SOPs)

Published 2025 - 2026



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SOP	Approval Date	Effective Date
Government Benefits Determination SOP v1.0	✓ October 28, 2025	December 4, 2025
Exchange Purposes SOPs v4.1	✓ October 28, 2025	December 4, 2025
QTF Version 2.1	✓ November 14, 2025	December 4, 2025
Health Care Operations (HCO) XP Implementation SOP Version 2.0	✓ January 12, 2026	February 15, 2026
Exchange Purposes SOPs Version 5.0	✓ January 12, 2026	February 15, 2026
Treatment XP Implementation SOP Version 1.2	✓ January 12, 2026	February 15, 2026
Individual Access Services (IAS) Provider Requirements SOP Version 2.1	✓ January 12, 2026	March 17, 2026
Facilitated FHIR Implementation SOP Version 2.0	✓ January 30, 2026	March 8, 2026
Consequences for QHIN Non-Compliance Version 1.0	✓ April 29, 2026	June 2, 2026
Individual Access Services (IAS) Provider Requirements SOP Version 3.0	✓ June 30, 2026	August 3, 2026
Treatment XP SOP Version 2.0	✓ July 1, 2026	August 3, 2026
Vetting Process XP SOP Version 2.0	✓ July 1, 2026	August 3, 2026
Exchange Purposes SOP Version 5.1	✓ July 1, 2026	August 3, 2026

Other SOPs Discussed with the TEFCA Governing Bodies: Dispute Resolution v2.0 | Inquiries and Investigations SOP v1.0 | Restricted Participation List SOP v1.0 | Directory Requirements SOP v1.2 | Governance SOP v2.0

Individual Access Services (IAS) Exchange Purposes Implementation SOP Version 3.0



Summary of Changes in Version 3.0 – *published July 1, 2026*

IAS Provider Use of Credential Service Providers (CSPs)

- Added requirements that CSPs must be able to verify a minimum set of demographic data
- Added the requirement that a CSP must use distinct issuer URLs for production and non-production IAS TEFCA Exchange

IAS Provider Responsibilities

- Added email OR mobile phone to the list of demographics that must be included as part of a valid IAS Query

IAS Provider Breach Mitigation Responsibilities

- Added requirements for IAS Providers to perform a “Demographics Double-Check” to supplement breach mitigation responsibilities

Response Requirement Approaches:

- Added a definition for TEFCA IAS FHIR Endpoint
- Defined two Response Modes for Responding Nodes to leverage when Responding to an IAS Query. A Responding Node must support at least one Mode :
 - » Mode 1 – Individual Authentication-based
 - » Mode 2 – Verified Identity-based
- Both Modes also added requirements for TEFCA IAS FHIR Endpoints to support the requirements in the HL7 SSRAA FHIR IG as outlined in the Facilitated FHIR Implementation SOP

Token Requirements:

- Added optional fields for “tefca_ial2claims_version” and “csp_issued_identifier” in addition to the OIDC required claims
- “regionality” was changed to “region” (and will be republished to reflect this change as a technical correction)”



Summary of Changes by SOP – *Published July 8, 2026*

Treatment XP Implementation SOP Version 2.0

- Further clarified who is eligible to use T-TRTMNT XP Code and under what circumstances it can be used.
- Updated the allowed examples with more detail and established prohibited examples.
- Clarified when a patient has a relationship with a Health Care Provider.
- Clarified scenarios where multiple queries are sent in succession.

XP Vetting Process SOP Version 2.0

- Added definitions for Representative Child Entity and Representative Individual Provider.
- Established a time limited transition period recognizing that some QHINs will need time to begin collecting the new evidence for Entrants.

Exchange Purposes SOP Version 5.1

- Minor edit removing examples of XP-specific limitations on types of Participants and Subparticipants as the full details live in the individual XP SOPs.

TEFCA Topics in Change Management



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The RCE, together with ONC and the TEFCA governance bodies, will use this webpage to provide transparency into amendments to the Framework Agreements, technical requirements, and SOPs in the change management process.

[View Recent Updates](#)



Stay Informed by Subscribing to Updates!

<https://rce.sequoiaproject.org/tefca-topics-in-change-management/>

TEFCA is Built with Community



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Representative governance

- Elected Governance Body members represent diverse stakeholders and help shape and vote on SOP changes.

Open calls for experts

- Organizations not yet participating in TEFCA have a pathway to contribute expertise.

Enhanced transparency

- Our updated transparency webpage shows what documents are in change management and invites written public feedback.

Real-time engagement

- Monthly information calls provide an open forum for questions on current updates.

Always-open feedback loop

- The RCE inbox remains available for stakeholder input at any time.



Bottom line: TEFCA policy development is collaborative, transparent, and continuously informed by stakeholder input.



ONC has tasked the RCE with leading a time-limited task to assess QHIN compliance practices

QHINs submitted information focused on key topics:

- Cybersecurity
- QHIN Governance
- QHIN Accountability
- Directory Currency
- IAS Provider Compliance
- QHIN Onboarding of Participants and Subparticipants
- Ongoing QHIN Oversight and Monitoring of Participant and Subparticipant Activity



Findings will provide insight into current practices across QHINs, including variations in process design, documentation, supporting artifacts, and metrics



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Educational Resources

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**

Aug 18, 2026 | 12:00-1:00pm ET



Resources

TEFCA Documents

Topics in Change Management

QHIN Application, Onboarding,
and Designation Process

Benefits of Participation

CSP Approval Organizations

Frequently Asked Questions

QHIN Cybersecurity Certification



How does TEFCA support exchange for Treatment?

Why was the Treatment Exchange Purpose (XP) Implementation SOP updated?

What steps were taken to develop the updated Treatment policies?

Will the updated Treatment policies allow all HIPAA Covered Entity Health Care Providers to require a response for a Treatment Query (T-TRTMNT)?

Will the updated Treatment and Vetting policies include collection of the information that was proposed as the Know Your Participant list?

Do all entities connected to TEFCA have to respond to a Query for Treatment (T-TRTMNT) under the Treatment Exchange Purpose (XP)?

How do I know that I can trust the entity that is querying for Treatment that requires a response?

Will the updated Treatment policies support organizations involved in value-based care arrangements?

When will the updated Treatment policies go into effect?



Questions & Answers

For more information:
rce.sequoiaproject.org



Thank You

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