

# Agenda

- Welcome, Introductions, Membership, Agenda - Bill Gregg, MD – 5 minutes
- Data Usability Workgroup Update & 2026 Cadence of Call Discussion – Bill Gregg, MD — 15 min
- Data Usability Taking Root Virtual Workshop Update – Didi Davis – 15 minutes
- How to Promote Yourself as a Workgroup Leader – 15 minutes
- Workgroup Discussion & Q&A – Didi Davis, Co-chairs and Workgroup – 5 minutes
- Reminders – 5 minutes



Adam Davis, MD, Co-chair  
Sutter Health



Bill Gregg, MD, Co-chair  
HCA Healthcare



Didi Davis, VP  
The Sequoia Project

# Workgroup Members

392 Organizations

490 Participants



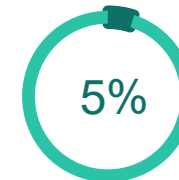
Healthcare  
Providers



Public Health



Consumer/Patient



Standards  
Developer



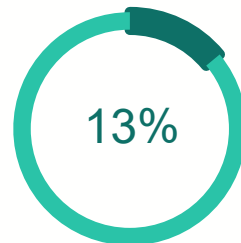
Health Plan/Payer



Federal, State, Local  
Government



HIN/HIEs



Other



Health IT  
Developers



# Sequoia Members Shape Interoperability for the Public Good



# Sequoia Members Shape Interoperability for the Public Good



# Sequoia Members Shape Interoperability for the Public Good



# **Data Usability Implementation Guide V2.0**

*Published December 11, 2025*

# DUWG Implementation Guide Version 2.0 – Summary

Key changes in this final publication included:

- Added guidance for receiving systems in addition to sending systems
- Advancing the baseline requirements from USCDI V1 (Problem, Allergy, Medications, Immunizations ONLY) to all data classes within USCDI V3
  - ASTP/ONC has updated the USCDI standard in § 170.213 by adding USCDI Version 3 (v3) and establishing a January 1, 2026, expiration date for USCDI v1 (July 2020 Errata) for purposes of the Certification Program.
- Expanded guidance to be technology agnostic with added requirements for HL7® FHIR®, HL7 v2.x and HL7 C-CDA across the topic categories
- Added an additional topic category for laboratory



USCDI

## USCDI Version 3 – Required in Base EHRs by 2026

<b>Allergies and Intolerances</b> <ul style="list-style-type: none"> <li>Substance (Medication)</li> <li>Substance (Drug Class)</li> <li>Reaction</li> </ul>	<b>Clinical Tests</b> <ul style="list-style-type: none"> <li>Clinical Test</li> <li>Clinical Test Result/Report</li> </ul>	<b>Health Status/ Assessments</b> <ul style="list-style-type: none"> <li>Health Concerns →</li> <li>Functional Status ★</li> <li>Disability Status ★</li> <li>Mental / Cognitive Status ★</li> <li>Pregnancy Status ★</li> <li>Smoking Status →</li> </ul>	<b>Patient Demographics/ Information</b> <ul style="list-style-type: none"> <li>First Name</li> <li>Last Name</li> <li>Middle Name (Including middle initial)</li> <li>Suffix</li> <li>Previous Name</li> <li>Date of Birth</li> <li>Date of Death ★</li> <li>Race</li> <li>Ethnicity</li> <li>Tribal Affiliation ★</li> <li>Sex</li> <li>Sexual Orientation</li> <li>Gender Identity</li> <li>Preferred Language</li> <li>Current Address</li> <li>Previous Address</li> <li>Phone Number</li> <li>Phone Number Type</li> <li>Email Address</li> <li>Related Person's Name ★</li> <li>Related Person's Relationship ★</li> <li>Occupation ★</li> <li>Occupation Industry ★</li> </ul>	<b>Procedures</b> <ul style="list-style-type: none"> <li>Procedures</li> <li>SDOH Interventions</li> <li>Reason for Referral ★</li> </ul>
<b>Assessment and Plan of Treatment</b> <ul style="list-style-type: none"> <li>Assessment and Plan of Treatment</li> <li>SDOH Assessment</li> </ul>	<b>Diagnostic Imaging</b> <ul style="list-style-type: none"> <li>Diagnostic Imaging Test</li> <li>Diagnostic Imaging Report</li> </ul>			<b>Provenance</b> <ul style="list-style-type: none"> <li>Author Organization</li> <li>Author Time Stamp</li> </ul>
<b>Care Team Member(s)</b> <ul style="list-style-type: none"> <li>Care Team Member Name</li> <li>Care Team Member Identifier</li> <li>Care Team Member Role</li> <li>Care Team Member Location</li> <li>Care Team Member Telecom</li> </ul>	<b>Encounter Information</b> <ul style="list-style-type: none"> <li>Encounter Type</li> <li>Encounter Diagnosis</li> <li>Encounter Time</li> <li>Encounter Location</li> <li>Encounter Disposition</li> </ul>	<b>Immunizations</b> <ul style="list-style-type: none"> <li>Immunizations</li> </ul>		<b>Unique Device Identifier(s) for a Patient's Implantable Device(s)</b> <ul style="list-style-type: none"> <li>Unique Device Identifier(s) for a patient's implantable device(s)</li> </ul>
<b>Clinical Notes</b> <ul style="list-style-type: none"> <li>Consultation Note</li> <li>Discharge Summary Note</li> <li>History &amp; Physical</li> <li>Procedure Note</li> <li>Progress Note</li> </ul>	<b>Goals</b> <ul style="list-style-type: none"> <li>Patient Goals</li> <li>SDOH Goals</li> </ul>	<b>Laboratory</b> <ul style="list-style-type: none"> <li>Test</li> <li>Values/Results</li> <li>Specimen Type ★</li> <li>Result Status ★</li> </ul>		<b>Vital Signs</b> <ul style="list-style-type: none"> <li>Systolic blood pressure</li> <li>Diastolic blood pressure</li> <li>Heart Rate</li> <li>Respiratory rate</li> <li>Body temperature</li> <li>Body height</li> <li>Body weight</li> <li>Pulse oximetry</li> <li>Inhaled oxygen concentration</li> <li>BMI Percentile (2 - 20 years)</li> <li>Weight-for-length Percentile (Birth - 24 Months)</li> <li>Head Occipital-frontal Circumference Percentile (Birth - 36 Months)</li> </ul>
	<b>Health Insurance Information</b> ★ <ul style="list-style-type: none"> <li>Coverage Status ★</li> <li>Coverage Type ★</li> <li>Relationship to Subscriber ★</li> <li>Member Identifier ★</li> <li>Subscriber Identifier ★</li> <li>Group Number ★</li> <li>Payer Identifier ★</li> </ul>	<b>Medications</b> <ul style="list-style-type: none"> <li>Medications</li> <li>Dose ★</li> <li>Dose Unit of Measure ★</li> <li>Indication ★</li> <li>Fill Status ★</li> </ul>	<b>Problems</b> <ul style="list-style-type: none"> <li>Problems</li> <li>SDOH Problems/Health Concerns</li> <li>Date of Diagnosis</li> <li>Date of Resolution</li> </ul>	

★ New Data Classes and Elements → Data Element Reclassified



# Table of Contents

- Executive Summary & Phases Timeline
  - Phase 1 - Administration & Prioritization
  - Phase 2 - IG Development
  - Phase 3 - IG Public Comment
  - Phase 4 - IG Publication
- Statement of Intent
- Sections/Chapters
  - Seven Topic Categories
  - Guidance with SHALL, SHOULD, MAY
- References
- Appendix A – High Priority Lab Results
- Appendix B – A Priority list of documents for information sharing



Guidance for  
Data Provenance  
& Traceability  
of Change



Guidance for  
Data Integrity,  
Format  
and Trust



Guidance for  
Effective  
Use of Codes




Guidance for  
Data Tagging /  
Searchability



Guidance for  
Laboratory  
Interoperability



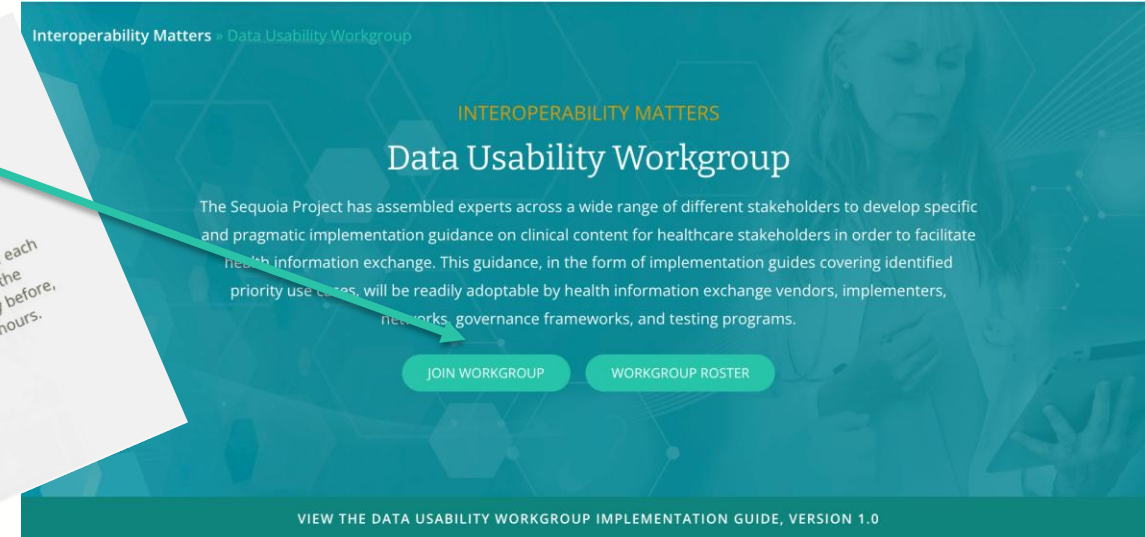
Guidance for  
Reducing  
the Impact of  
Duplicates



Guidance for  
Effective Use  
of Narrative  
for Usability

# Website, Meeting and Workgroup Logistics

- Register for the Workgroup
- Calendar Downloads
- Meeting Notes




## Meeting Materials and Recordings

**2025      2023 - 2024      2020 - 2022**

▶ August 7: Meeting Notes

▶ April 3: Meeting Notes

▶ February 6: Meeting Notes

 <https://sequoiaproject.org/interoperability-matters/data-usability-workgroup/>  
[Interopmatters@sequoiaproject.org](mailto:Interopmatters@sequoiaproject.org)

## Meeting Logistics and Timeline

- In 2025, the Data Usability Workgroup will begin a quarterly meeting cadence on the following dates:
  - February 6
  - April 3
  - August 7
  - ★ October 2
- This will allow industry to familiarize themselves with the new V2.0 before we get too ahead of ourselves for the expected **18-month** adoption expectations.
- Calendar invites are available [here](#) for download

# Quick Survey

Please complete the following survey:

[https://docs.google.com/forms/d/e/1FAIpQLSfJsqa2nOeY\\_Y6OFApna8HvNymB0CIUqwhV7-Nja46yqNKz\\_w/viewform?usp=header](https://docs.google.com/forms/d/e/1FAIpQLSfJsqa2nOeY_Y6OFApna8HvNymB0CIUqwhV7-Nja46yqNKz_w/viewform?usp=header)





# Community of Practice Update

September 23, 2025  
Workshop Overview



# Data Usability

Taking Root Movement

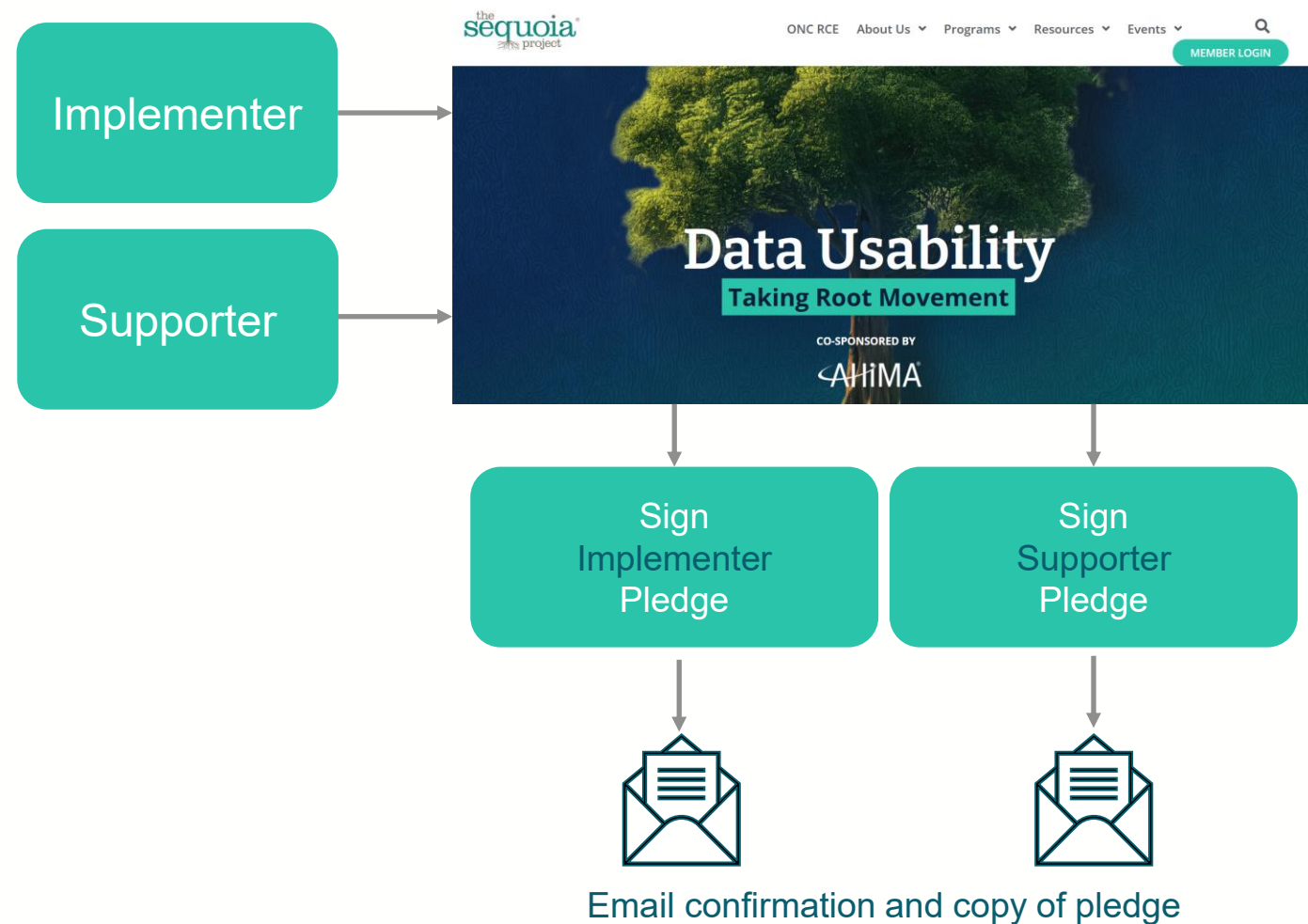
CO-SPONSORED BY



# What is the difference between the Data Usability Taking Root Movement and the Data Usability Workgroup?



# Pledge Process – Open NOW!





Those who  
have pledged  
will have  
password-  
protected  
access to  
**Data Usability  
Taking Root  
Resources** on  
the Sequoia  
website





# Taking Root Meetings

- Jan 22 2pm ET: Office Hour
- Feb 26 2pm ET: Community of Practice Roundtable
- Mar 26 2pm ET: Community of Practice Roundtable
- Apr 23 2pm ET: Community of Practice Roundtable
- May 28 2pm ET: Community of Practice Roundtable
- Jun 25 2pm ET: Community of Practice Roundtable
- Jul 23 2pm ET: Community of Practice Roundtable
- ~~• Aug 27 2pm ET: Community of Practice Roundtable~~
- Sep 23 Data Usability Taking Root Virtual Workshop
- ~~• Sep 24 2pm ET: Community of Practice Roundtable~~
- Oct 12 AHIMA25 Conference
-  Oct 22 2pm ET: Community of Practice Roundtable
-  Nov 19 Sequoia Project Annual Meeting



# Organizations that have pledged to participate

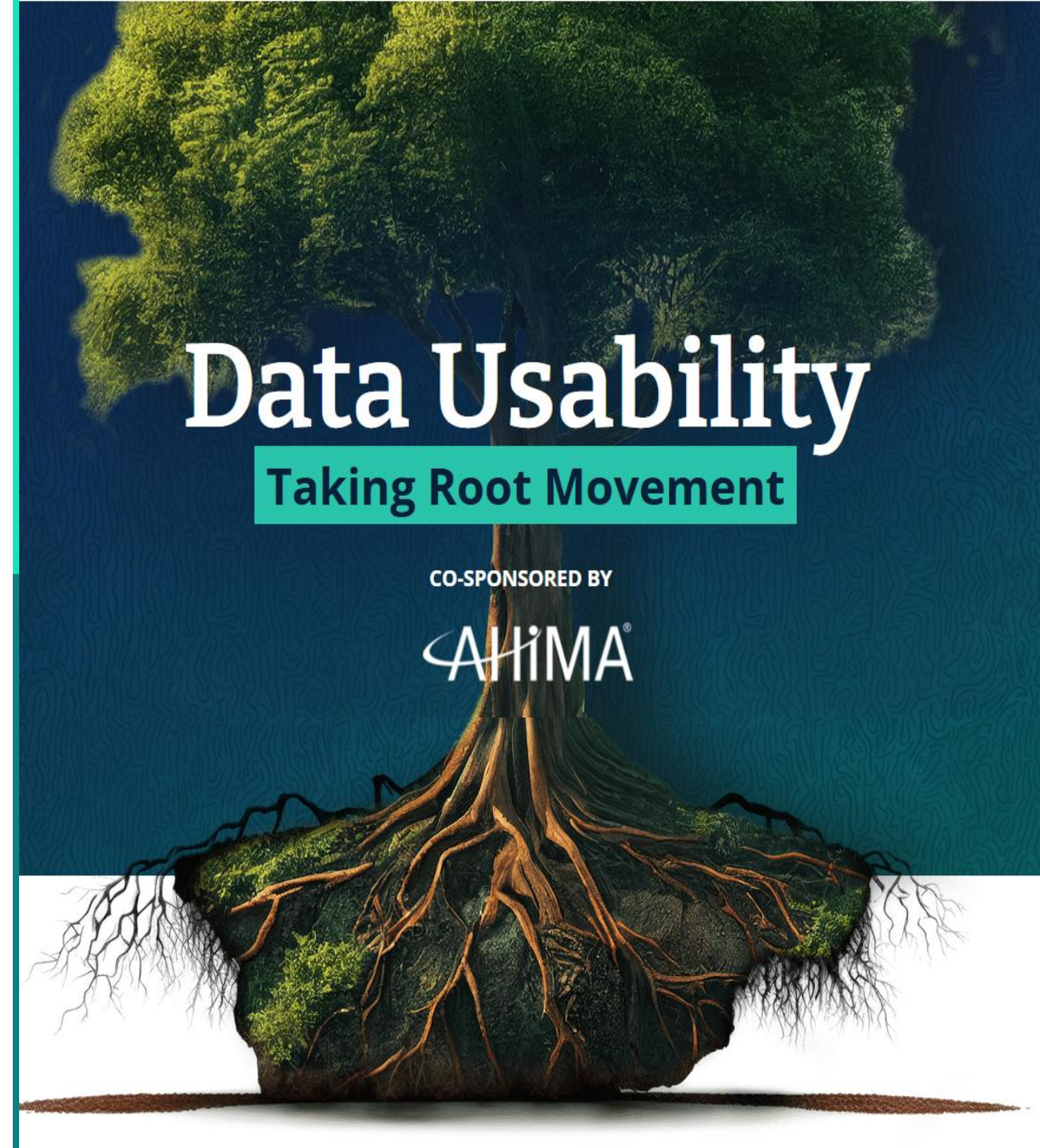


# Data Usability Virtual Workshop Recap

# Data Usability Virtual Workshop

September 23, 2025

10:00am – 5:00pm ET



# Workshop Sessions

## **SESSION 1 (10:00AM-12:00PM ET)**

### **Data Usability: What, Why, and How**

The goal of the first session is to explain what data usability is, why it's important and how Data Usability Implementation Guide (DUIG) V1.0 and 2.0 can advance usability.

## **SESSION 2 (1:00PM – 3:00PM ET)**

### **Under the Microscope: Data Usability Labs**

The goal of the second session is to explain laboratory data usability, why it's an especially vital use case, and how the newly released DUIG V2.0 can advance meaningful interoperability.

## **SESSION 3 (3:15PM – 5:00PM ET)**

### **Taking Root: Community of Practice**

The goal of the third session is to provide self-assessment tools to implement DUIG V2.0 and information on the opportunity to participate in a community of practice to advance adoption and implementation of guidance.



# Session 1

Data Usability What, Why, & How: The goal of the 1st session is to explain what data usability is, why it's important and how DUIG V1.0 and 2.0 can advance usability.

## Topic

Welcome

**Stories from the frontline:** Panel of healthcare providers share testimonials on the importance of data usability and how their organizations made data usability a priority

### Education

Benefits of Data Usability to Stakeholders

Evolution of DUIG V1.0 & V2.0

Alignment with Industry & Regulations ASTP/ONC, CDC, DirectTrust, HL7 v2.x, HL7 C-CDA, HL7 FHIR, HHS, LOINC, NLM, SHIELD, SNOMED-CT, USCDI versions and CLIA requirements

Data provenance & traceability of changes

Data integrity format and trust

Effective use of codes

Data tagging and searchability

Reducing impact of duplicates

Effective use of narratives

Laboratory Interoperability

## Faculty

Didi Davis & Lauren Riplinger

### Panelists

Natalee Agassi, MD, Oracle

Melany Byerly, SSA

Zach Heiman, Epic

Bill Gregg, MD, HCA

Healthcare

### Moderator:

Andrew Tomlinson, AHIMA

**Presenter:** Didi Davis, The Sequoia Project

**Presenter:** Natalee Agassi, MD, Oracle

**Q&A Facilitator:** Lauren Riplinger, AHIMA

# Session 2

Data Usability Under the Microscope: Labs -The goal of the 2nd session is to explain laboratory data usability, why it's an especially vital use case, and how the newly released DUIG V2.0 can advance meaningful interoperability.

Topic	Faculty
Welcome	Didi Davis & Lauren Riplinger
<b>Lab Data Use Cases - Why Paper Just Doesn't Cut it Anymore:</b> panel of healthcare providers share testimonials on the importance of lab data usability	<b>Panelists</b> Adam Davis, MD, Sutter Steven Lane, MD, Health Gorilla Katherine Lusk, THSA Andrea Pitkus, PhD, University of WI <b>Moderator:</b> Tara O'Donnell, AHIMA
<b>Education</b> Overview of Data Usability Implementation Guide – Section 7: Laboratory Interoperability	<b>Presenter:</b> Andrea Pitkus, PhD, University of WI
Use Case #1: Clinical Laboratory Information System sends results to Provider's EHR	<b>Presenter:</b> Natalee Agassi, MD, Oracle
Use Case #2: A Provider Sends Lab Results to another Provider	<b>Presenter:</b> Adam Davis, MD, Sutter
Use Case #3: A Provider Sends Lab Results to Public Health	<b>Presenter:</b> Riki Merrick, MPH, APHL
	<b>Q&amp;A Facilitator:</b> Tara O'Donnell, AHIMA

# Session 3

Data Usability Taking Root: Community of Practice Tools - The goal of the 3rd session is to provide self-assessment tools to implement DUIG V2.0 and information on the opportunity to participate in a community of practice to advance adoption and implementation of guidance.

## Topic

Welcome

**Introduction to the Community of Practice**

**Stories from the frontlines – How innovators are moving their organization to implement data usability guidance.** Panel of healthcare providers, health information networks, and HIT developers share testimonials on participating in the community of practice. Potential talking points: Interoperability in All Projects, ROI, Approach, Decision making

**Implementation Readiness Checklist**

**Implementation Performance Scorecard**

**Testing Platform & Technical Assistance**

**Sustaining data usability momentum with a Community of Practice approach**

## Faculty

Didi Davis

**Presenter:** Lauren Riplinger, AHIMA

**Panelists**

Lisa Nelson, DirectTrust  
Laura Nixon, Clinical  
Architecture

**Moderator:**

Andrew Tomlinson, AHIMA

**Presenter:**

Didi Davis, The Sequoia Project  
Laura Bright, The Sequoia Project

**Q&A Facilitator:** Andrew Tomlinson, AHIMA

View Recordings Here:

<https://sequoiaproject.org/data-usability-taking-root-virtual-workshop/>

**Data Usability  
Virtual Workshop**

Driving Better Outcomes by Improving  
Usability of Clinical Data

CO-SPONSORED BY **AHIMA**

**the sequoia project**

Stories from the Frontlines:  
A panel shares testimonials on the importance of data usability and how their organizations made data usability a priority

Natalie Agassi, MD, PhD  
PharmD  
Oracle

Zach Holman  
Epic

Bill Gregg, MD, MS, MPH  
HCA Healthcare

Andrew Tomlinson, AHIMA  
Moderator

**Virtual Workshop  
Video Recordings Now  
Available**



# Our Next Roundtable

- Every 4<sup>th</sup> Wednesday of the month from 2:00-3:00pm ET
  - Next Roundtable: October 22, 2025 (2:00-3:00pm ET)
  - November Cancelled due to Annual Meeting in Nashville, TN – Hope to see you there!
  - December Cancelled due to the holidays.
  - 2026 Roundtable Begins: January 28, 2026 (2:00-3:00pm ET)

## CALL to ACTION:

- Consider Pledging to be a Supporter or Implementer of the Data Usability Taking Root Initiative
- Share/Socialize this information internally to our organization or with your partners/peers

# It's time for data usability guidance to **take root!**

# Contact Us

Thank you for your interest in The Sequoia Project's new **Data Usability Taking Root** Initiative.



If you would like to get in touch you can reach us at:



**takingroot@sequoiaproject.org**

**To join the Community of Practice Roundtables, please sign up as a Supporter, Implementer or Sponsor here:**

<https://sequoiaproject.org/data-usability-taking-root-movement/>



## OVERVIEW

# How to Promote Yourself as a Workgroup Leader

# Why Share My Involvement?

**We want to support you in being recognized as leaders in your field.**

Sharing your workgroup involvement builds credibility, shows your expertise, and highlights your impact.

Sharing your knowledge also gives others a reason to see you as someone worth learning from.

## Experience



### Co-Chair Data Usability Workgroup

The Sequoia Project

Oct 2020 - Present · 4 yrs 11 mos

## Experience



### Data Privacy and Consent Workgroup Co-Lead

The Sequoia Project · Full-time

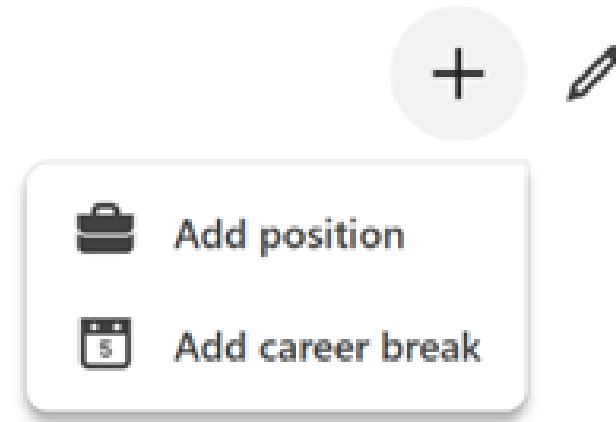
Jun 2025 - Present · 1 mo

Remote



# Add your Workgroup to your LinkedIn Work History.

- Go to your profile page
- Scroll down to “*Experience*” (Work Experience)
- Click “+” on the top right
- Click “*Add position*”



# Add your Workgroup to your LinkedIn Work History.

## Add experience



### Notify network

Turn on to notify your network of key profile changes (such as new job) and work anniversaries. Updates can take up to 2 hours. Learn more about [sharing profile changes](#).



\* Indicates required


Title\*

Interoperability Matters- Data Usability Workgroup Member

Employment type

Please select

Company or organization\*

 The Sequoia Project

☐ I am currently working in this role

Save

Description

I am a member of a workgroup with The Sequoia Project (nonprofit). We develop specific and pragmatic implementation guidance on clinical content for healthcare stakeholders in order to facilitate health information exchange. This guidance, in the form of implementation guides covering identified priority use cases, will be readily adoptable by health information exchange vendors, implementers, networks, governance frameworks, and testing programs.

200/2,000

Profile headline

Job Title at Company | Member of X Workgroup

Appears below your name at the top of the profile

Where did you find this job?

Please select

Save



# Give yourself Publishing Credit!

- If you assist with writing or editing your workgroup's whitepaper, checklist, guide, toolkit, or roadmap, you can give yourself public-facing credit on LinkedIn as well!
- All you have to do is go to your profile, click on *"Add profile section"* in the top right, and click on *"Add publication"*.

Add publication
×

\* Indicates required

Title\*

Publication/Publisher

Publication date

Author

You are an author. Add others that contributed to the publication.

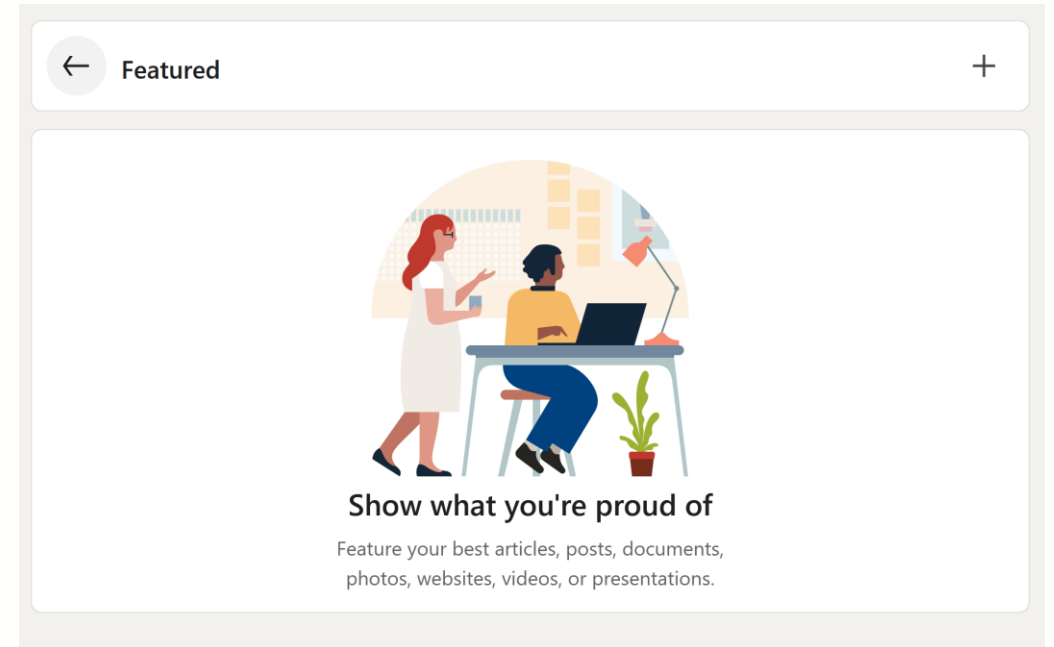
+ Add author

Publication URL

Save

# Give yourself Featured Credit!

- You also have the ability to go to "*Add profile section*" in the top right, and click on "*Add featured*".
- Here, we highly recommend featuring any workgroup content that you would like to give any additional promotion to! For instance, the blurbs we featured before would be great to include. But no obligation- this is your personal brand and completely up to you.
- You can also spotlight social media posts that are shared.



# Give yourself Project Credit!

- It is also possible to *"Add a profile section"* with *"Current Projects"*, where any miscellaneous items can be added as you work on them within the workgroup.
- Ex: *"Data Usability Implementation Guide- V2.0" (Workgroup Deliverable)*
- This can also be great for soliciting network feedback when needed related to workgroup topics!
- Just confirm with workgroup leads that info is public when unsure!

Add project

×

\* Indicates required

Project name\*

Description

0/2,000

Skills

We recommend adding your top 5 used in this project. They'll also appear in your Skills section.

+ Add skill

Media

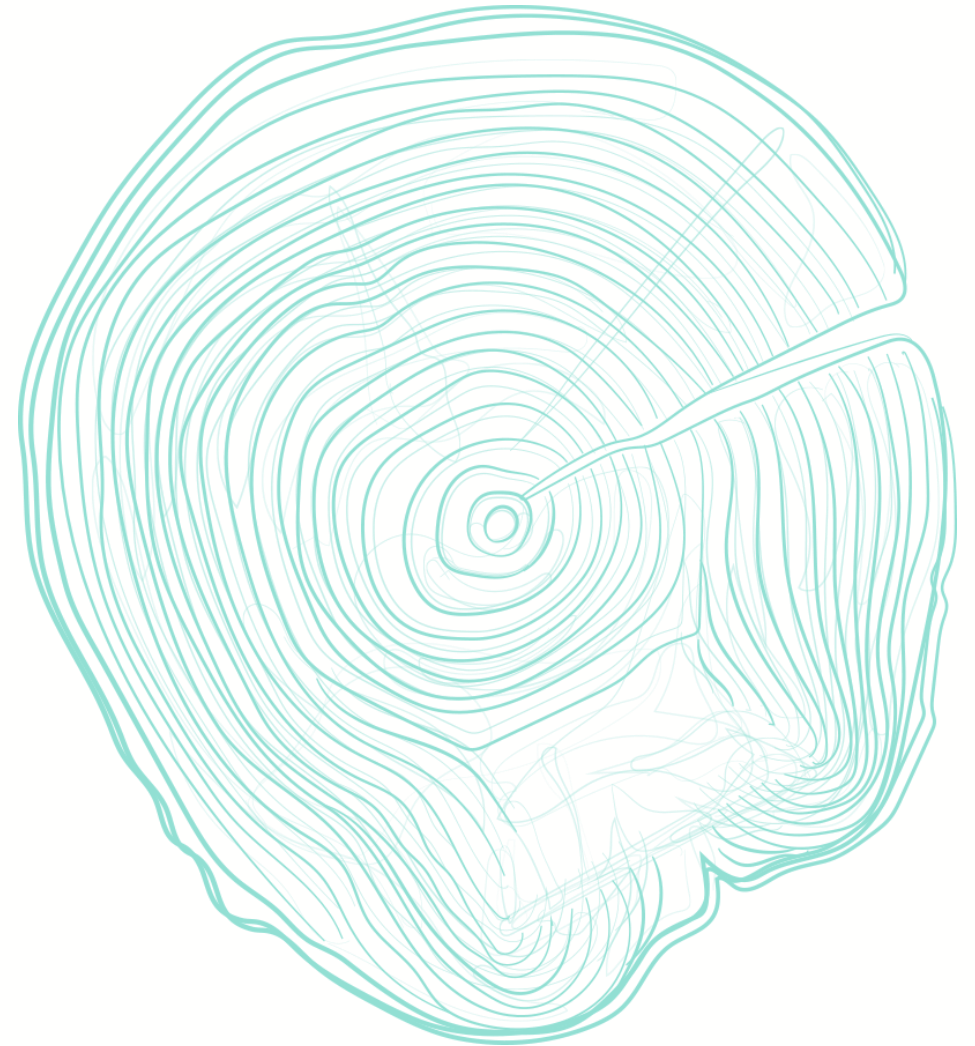
Add media like images, documents, sites or presentations. Learn more about [media file types supported](#)

Save

Show all 4 honors & awards →

## Optional- Social Posts:

- We are going to share a few sample social media posts for your reference. Feel free to copy/paste to spread the word, no pressure to write your own but we welcome that if you are feeling up to it.
- As a nonprofit, we have limits to how we are allowed to express things, but as individual personal accounts, you all have a bit more freedom to get folks excited about the work you are doing.



# Annual Meeting- Nov 19- 20, 2025

- *Join me at the Annual Meeting! I will be attending. Excited for \*insert something custom here\*.*
- *Register here:*  
<https://sequoiaproject.org/2025-annual-meeting/>



# Optional- Social Posts

- Let me share with you something I've helped build: The Data Usability Workgroup Implementation Guide Version 2.0. This document features use cases that can be readily adopted to better data usability for patients everywhere.
- As a member of the Data Usability Workgroup with [@The Sequoia Project](#), I am excited to see where it all goes. Learn more about our work here: <https://sequoiaproject.org/interoperability-matters/data-usability-workgroup/>



# Optional- Like and Follow The Sequoia Project!

- <https://www.linkedin.com/company/the-sequoia-project/>
- We want to post relevant and meaningful content for your workgroup. Keep in contact with me ([sandersen@sequoiaproject.org](mailto:sandersen@sequoiaproject.org)) if you ever have any ideas for topics we should spotlight.
- When we post about a topic, all you have to do is "**like**" or "**reshare**" or "**comment**" to support further reach about important topics relevant to your workgroup.
- We look forward to spotlighting you more in the future and getting our initiatives a little more in the public eye!



## Data Usability Work Group

**For more information:**

[www.sequoiaproject.org/interoperability-matters/data-usability-workgroup/](http://www.sequoiaproject.org/interoperability-matters/data-usability-workgroup/)



(571) 327-3640



Interopmatters@sequoiaproject.org

Convene



Collaborate



Interoperate



**Thank You for your support of  
Interoperability Matters!**



# Reminders

# AHIMA<sup>®</sup> 25 CONFERENCE

OCTOBER 12-14, 2025

MINNEAPOLIS

## Taking Root: How to Make Usable Data More Actionable

**Didi Davis**

*VP, informatics,  
Conformance &  
Interoperability*

The Sequoia Project  
Knoxville, TN

**Lauren Riplinger,**

*Chief Public Policy &  
Impact Officer*

AHIMA

Washington, DC

EMPOWER.  
EVOLVE.  
IMPACT.

<https://reg.ahimaevents.ahima.org/flow/ahima/ahima/landingpage/page/registration>

October 14, 2025 - 10:50 – 11:40am CDT



the  
sequoia<sup>®</sup>  
project



carequality

# Annual Meeting 2025



NASHVILLE

TENNESSEE

Sponsorships Available | Room Block Now Open

<https://sequoiaproject.org/2025-annual-meeting/>