<u>All times are Pacific</u>
<u>MONDAY, FEBRUARY 23, 2026</u>

<u>Thanks to our Event Sponsor</u>

mcg
PART OF THE
HEARST HEALTH NETWORK

8:30am- 8:45am, **WEDI Welcome**

- Robert Tennant, WEDI Executive Director

8:45am- 9:00am, **Patient Experience Workgroup Intro**

- Emma Andelson, Lead Policy Analyst, American Medical Association, WEDI Patient Experience Workgroup Co-Chair
- Anna Hyde, Vice President, Advocacy and Access, Arthritis Foundation, WEDI Patient Experience Workgroup Co-Chair

9:00am- 9:30am, **The Federal Vision for Health IT: Empowering Patients Through Data and Technology**

We welcome Steve Posnack to discuss the federal vision for advancing health IT to improve access, interoperability, and trust in health information. Attendees will gain insight into how policy, data exchange, and emerging technologies are being aligned to empower patients, reduce friction, and enhance the overall patient experience.

- Steven Posnack, Principal Deputy Assistant Secretary for Technology Policy, ASTP/ONC

9:30am- 10:00am, Defining High Confidence AI in Utilization and Case Management

Delve into the transformative potential of generative AI to streamline utilization management and case management. This session explores the administrative burden in healthcare, the limitations of structured data, and how generative AI can address these challenges. Discover real-world use cases, governance strategies, and the human-in-the-loop design approach that ensures AI solutions are both safe and effective.

Jason Gillman, MD, Senior Director, Clinical Informatics, MCG Health

Sponsored by mcg

10:00am- 10:45am, **Advocate Panel: Policy & Regulation: Setting the Stage**

Patient advocacy organizations play a critical role in shaping how health IT policy and regulation translate into real-world patient experiences. Representatives from the Arthritis Foundation, ALS Association, and the National Rural Health Association will share perspectives on how current and emerging health IT policies affect access, care coordination, and engagement for the populations they serve. This panel will highlight common challenges and opportunities across diverse patient communities and set the stage for broader discussions on how policy, data, and technology can better support patients, caregivers, and advocates alike

- Rich Brennan, Vice President, Federal Affairs, ALS Association
- Anna Hyde, Vice President, Advocacy and Access, Arthritis Foundation
- Marguerite Peterseim, Government Affairs and Policy Coordinator, National Rural Health Association
- *Moderated by Charles Stellar, former WEDI President and CEO*

10:45am- 11:00am, **AM Break**

11:00am- 11:45pm, **Access APIs in Motion: Data Access & Patient Empowerment**
As patient access to health data continues to expand, APIs are playing a central role in enabling transparency, choice, and engagement. Representatives from three payer organizations will discuss how access APIs are improving the patient experience by making data easier to access, use, and share across care journeys. The session will also highlight complementary, data-centric initiatives across the health IT community that are helping empower patients to actively engage with and manage their health information.

- Robert Oakley, Strategy & Interoperability Lead, Physician Innovation, Evernorth
- Nancy Bevin, Director, Provider Connectivity, Medica
- Ron Wampler, Executive Director, Interoperability, Aetna, a CVS Health Company

11:45am- 12:30pm, **Lunch**

12:30pm- 1:00pm, **Modernizing Demographic Data Standards to Improve Access and Outcomes**
Health plans and providers invest significant resources in collecting patient demographic data to understand how and why health and outcomes vary by population. Yet, the data is often incomplete or inaccurate. Learn about the national, multi-stakeholder Demographic Data Element Modernization (DEMo) Initiative and results from patient and clinician testing of the proposed data standards. Gain insights into how to join the effort and help to advance interoperability across the ecosystem.

- Danielle Lloyd, Vice President of Private Market Innovations and Quality Initiatives, AHIP
- Rebekah Angove, PhD, Executive Director, Patient Advocate Foundation's Patient Insight Institute

1:00pm- 1:30pm, **From Insight to Intervention: Addressing Behavioral Health Disparities in Asian American Enrollees**
California's Asian and Asian American populations experience significant behavioral health disparities driven by stigma, lack of culturally sensitive care, systemic access barriers, and underdiagnosis. With 6.8 million Asian Americans—17.2% of the state's population1—this session explores how Covered California is addressing these challenges through innovative, data-driven strategies aimed at advancing health equity

- Taylor Priestly, Director of Health Equity & Quality Transformation, Health Equity Officer, Covered California
- Chelsea Hart-Connor, Health Informatics Lead, Covered California
- Charles Raya, Equity & Quality Specialist, Covered California

1:30pm- 2:15pm, Closing the Loop: Integrating 211 and Healthcare Data to Support Whole-Person Care

- Alana Kalinowski, Interoperability Solutions Architect, San Diego 211

2:15pm- 2:45pm, **Leveraging Innovation & Emerging Tech (AI) to Improve Patient Engagement**
Description Coming Soon

- Brittne Kakulla, PhD, Senior Consumer Insights Manager, Technology Lead, AARP Research

2:45pm – 3:00pm, Afternoon Networking Break

3:00pm- 3:45pm, **Digital Innovation Transforming Ambulatory Access**
This session explores the cutting edge of digital tools that are reshaping how patients access care delivery. From self-scheduling and intelligent automation to virtual assistants and bi-directional communication, learn how leading health systems are leveraging technology to reduce friction and enhance patient experience.
Speakers:

- Elizabeth Johnson, Vice President, Patient Access Contact Centers, Emory Healthcare
- Tara Mahoney, Vice President, Health Care Practice, Geneys
- Elizabeth Woodcock, DrPH, MBA, Executive Director, Patient Access Collaborative

3:45pm- 4:30pm, **When AI Becomes a Partner in Patient Discovery: How Conversational Tools Are Transforming the Diagnostic Journey**
What happens when patients and caregivers are empowered with AI as a thinking partner in their search for answers? This session explores how conversational AI tools are beginning to reshape the diagnostic journey—not by replacing clinicians, but by augmenting patient curiosity, research, and advocacy. Through anecdotal accounts of patients who used AI to synthesize symptoms, explore possible root causes, and ultimately accelerate a rare disease diagnosis, this discussion highlights the emerging role of AI in patient-led discovery and engagement.

- Linda Macomber, Professor of Practice, National University, 2025 Life Fellow Awardee, HIMSS

4:30pm- 5:15pm, **Putting Data to Work for Patients: A User-Centric Approach to Exchange**
Connecting for Better Health will highlight its work advancing data sharing through the California Data Exchange Framework and how these efforts are improving access to patient health and social information. This session will explore how a user-centric approach to interoperability supports care coordination, enables more informed decision-making, and reinforces an organization's mission to leverage data in ways that meaningfully improve patient experience and overall health outcomes.

- Timi Leslie, Executive Director, Connecting for Better Health
- Richard Kwong, Head of Product, Connecting for Better Health
- Toria Thompson, Advisor, Connecting for Better Health

TUESDAY, FEBRUARY 24, 2026

8:30am- 9:00am, **Improving Data Accessibility & Improving Care Coordination**

- Paul Wilder, Executive Director, CommonWell Alliance

9:00am- 9:30am, **Advancing Patient Cost Transparency: Implementing the Da Vinci PCT Implementation Guide**

The Da Vinci Patient Cost Transparency (PCT) Implementation Guide helps patients receive clearer, more accurate cost information before they receive care. This session will explore how payers and providers can work together to support better cost estimates, improve transparency, and meet federal requirements like the No Surprises Act. Attendees will hear practical insights and lessons learned from early efforts to make cost information more accessible and meaningful for patients.

- Rick Geimer, Senior Principal Innovation Engineer, Lantana Consulting Group
- Corey Spears, Consultant, Lantana Consulting Group

9:30am- 10:15am, **No Surprises Act & Price Transparency Updates**

Several years into implementation, the No Surprises Act and related price transparency requirements continue to evolve. This session brings together the co-chairs of WEDI's No Surprises Act Task Group with representatives from AHIP and the Arthritis Foundation to discuss real-world experiences with Patient Access APIs, plan cost calculators, machine-readable files, AEOBs, and the potential role of TEFCA in improving cost transparency and patient understanding.

- WEDI No Surprises Act Task Group Co-Chairs
    - Stanley Nachimson, Principal, Nachimson Advisors
    - Beth Davis, Senior Manager, Veradigm Payerpath
    - Terrence Cunningham, Director of Administrative Simplification Policy, American Hospital Association
- Danielle Lloyd, Vice President of Private Market Innovations and Quality Initiatives, AHIP
- Anna Hyde, Vice President, Advocacy and Access, Arthritis Foundation

10:15am – 10:30am, Morning Networking Break

10:30am- 11:15am, From Local Exchange to Statewide Impact: The SCHIO–Manifest MedEx Model for Whole-Person Data Sharing

Discover how SCHIO and Manifest MedEx are building a more connected, person-centered data ecosystem for California. Through their new affiliation, the organizations are creating a statewide infrastructure that brings together clinical, social, behavioral, and claims data to support whole-person care. Attendees will gain insights into how this work improves coordination, equity, and the patient experience.

Manifest MedEx and the Serving Communities Health Information Organization (SCHIO) have entered a strategic affiliation. This affiliation will help communities in Santa Cruz, the Bay area, and across the state get critical health, behavioral, and social data from both networks to better coordinate whole-person care and optimize health and wellness.

This collaboration marks a major step toward advancing comprehensive data sharing across California to ensure communities receive the care wherever and whenever needed.

- Adam Harrison, Chief Business Development Officer, Manifest MedEx
- Dan Chavez, Executive Director, Serving Communities Health Information Organization SCHIO

11:15am- 12:00pm, **Advance Care Planning as a Foundation for Personalized Care Plans: Technology as a Delivery Mechanism**

As federal health IT efforts accelerate, there is growing focus on using interoperable data to ensure patients' preferences are known, respected, and accessible when and where care decisions are made. This session will highlight a decade-long, CMS-supported initiative to make Advance Care Planning documents securely available across providers and care settings using standards-based exchange, including FHIR. This presentation will explore how this work expands patient access to their expressed wishes, supports more informed conversations between patients, caregivers, and clinicians, and reduces administrative burden through data-driven approaches—demonstrating how technology can strengthen the human experience of care.

  - Maria Moen, Co-Chair of HL7's Patient Empowerment Work Group, SVP of Innovation & External Affairs of MyDirectives