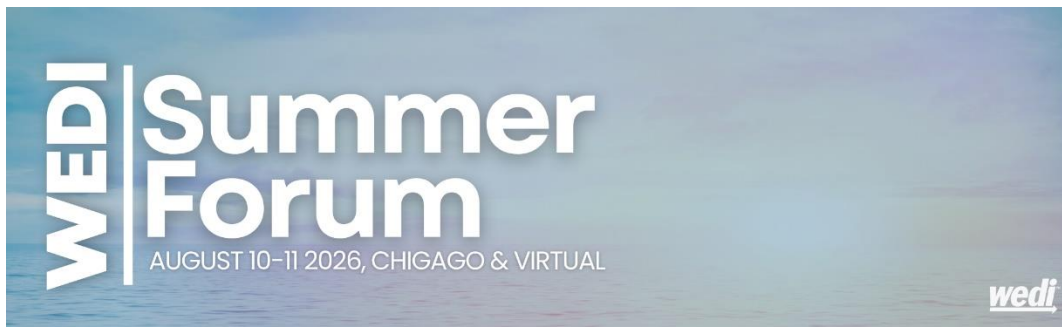




Agenda Subject to Change
All Times Central

August 10, 2026

8:15am – 8:30am

WEDI Welcome

8:30am – 9:45am

Identifying Keys to Success in 0057 Implementation
Sponsored by InterSystems



This interactive exercise challenges participants to step into the role of a health plan interoperability leader and collaboratively define what it will take to move beyond CMS-0057 compliance to achieve widespread adoption of electronic prior authorization. Working in cross-industry teams representing payers, providers, EHRs, and technology partners, attendees will identify the capabilities, investments, and potential barriers that will determine whether FHIR-based ePA becomes a transformative industry solution or simply another compliance initiative.

- **Steven Berkow, Head of Value-Based Care Market Strategy, InterSystems**

9:45am – 10:30am

Preparing for Success: CMS 0057 Implementation and CMS 0062P Readiness

Hear from health care payer leaders as they discuss their CMS 0057 implementation experiences, including workflow changes, testing readiness, operational challenges, and lessons learned. The panel will also explore perspectives on the future incorporation of CMS 0062P and its potential impact on interoperability strategies.

- **Cara Wahmann, HCSC**
- **Tom Loomis, Evernorth**
- **Ron Wampler, Aetna, a CVS Health Company**

10:30am – 10:45am

Networking Break

10:45am – 11:15am

CMS 0057 in Practice: Real-World Insights from Providers

Provider organizations are taking important steps to prepare for CMS 0057 implementation. This panel will explore testing readiness, workflow impacts, operational considerations, lessons learned, and the evolving role of CMS 0062P in supporting data exchange and patient access.

- **Natalie Farrell, Mayo Clinic**
- **Becky Fortek, Mayo Clinic**
- **Anna Taylor, MultiCare Connected Care**
- **Michael Westover, Providence**

11:15am – 12:00pm

The Finished Article: Aligning CMS, Payers and Partners on the Modernization of Healthcare Infrastructure

Sponsored by Cotiviti

COTIVITI

The Healthcare Infrastructure Company™

As the healthcare industry moves from preparing for interoperability to actively implementing it, a critical question remains: what does success look like at scale—and how do we get there together? Featuring perspectives from federal policy, national associations and leading health plans, the multistakeholder panel discussion will explore the “finished article”: a future-state healthcare infrastructure where payers, providers, public agencies, and technology partners operate in alignment around shared standards, shared incentives, and shared data.

- **Kevin Day, Cotiviti (moderator)**
- **Julie Brown-Georgi, American Medical Association**
- **Crystal Farmer, Medical Mutual of Ohio**
- **Lorraine Doo, former CMS Senior Policy Advisor**

12:00pm – 12:45pm

Forum Lunch Break

12:45pm – 1:15pm

Bridging the Gap: Clearinghouse Best Practices for CMS 0057F Implementation

Explore CMS-0057-F implementation from the clearinghouse perspective, focusing on the operational and interoperability considerations required for scalable industry adoption. Crystal Ewing (Waystar), representing The Cooperative Exchange, will share insights from current implementation efforts, including testing readiness, implementation documentation, API workflows, and industry coordination. Attendees will gain practical perspectives on the role of clearinghouses in

supporting connectivity across payers, providers, and vendors, as well as emerging best practices and opportunities to improve alignment on the path to production readiness.

- **Crystal Ewing, Cooperative Exchange, Waystar**

1:15pm – 2:00pm

From Sandbox to Production: CMS-0057-F Testing Strategies and Challenges

Sponsored by Drummond



- **Timothy Bennett, Drummond**
- **Scott Rossignol, eHealth Exchange**
- **Richard Kwong, Connecting for Better Health**
- **Blake Buckthal, Waystar**
- **Cara Wahmann, HCSC**

2:00pm – 2:15pm

Networking Break

2:15pm – 3:00pm

CMS Interoperability Requirements and the 2026 Interoperability Standards and Prior Authorization for Drugs Proposed Rule (CMS-0062-P)

Staff from the CMS Office of Health Technology and Products will review the trajectory of interoperability and prior authorization policy, including upcoming implementation deadlines established in 2024 CMS Interoperability Standards and Prior Authorization Final Rule (CMS-0057-F) and policy proposals in the 2026 CMS Interoperability Standards and Prior Authorization for Drugs Proposed Rule (CMS-0062-P).

- **Shanna Hartman, CMS**
- **Nora Simmons, CMS**

3:00pm – 3:45pm

Recap of HHS' DSMO Listening Session & Opportunity for Additional Industry Feedback

On July 1, 2026, HHS held a Listening Session with the 6 Designated Standards Maintenance Organizations (DSMOs), and WEDI to inform potential provisions for an upcoming proposed rule (CMS-0061-P). Specifically, the listening session covered 8 key topics concerning advancement of the current HIPAA-mandated administrative simplification transaction standards from version 5010 to version 8060. Staff from the Division of Policy within OHTP's Standards & Interoperability Group will briefly review the feedback received

on these topics and provide an opportunity for additional feedback from the audience.

- **Shaheem Halim, CMS**
- **Geanelle Herring, CMS**

3:45pm – 4:15pm

Before Prior Auth Automation Works, the Policy Has to Work: What Health Plans Are Missing

Sponsored by Itiliti Health



ITILITI HEALTH

This session examines why prior authorization policies (as most health plans have written and structured them) are not ready to support the automation they are driving, and what a structured, clinically governed policy foundation truly requires. Using a real policy example, attendees will leave with a clear picture of where the gap lives and what health plans need to address to make their automation investments pay off.

- **Michael Lunzer, Founder & CEO, Itiliti Health**

4:15pm – 5:00pm

Ahead of the Curve: Real World Lessons from Drug Prior Authorization Implementation

Before CMS 0062P, some organizations were already advancing electronic prior authorization for medications. Join leaders from Massachusetts Health Data Consortium and Health Care Service Corporation as they share their planning experiences, lessons learned, operational considerations, and best practices for incorporating drugs into prior authorization workflows. Attendees will gain practical insights to help accelerate readiness and avoid common pitfalls as the industry prepares for future requirements.

- **Denny Brennan, Massachusetts Health Data Consortium**
- **Cara Wahmann, HCSC**

August 11, 2026

8:10am – 8:15am

WEDI Welcome

8:15am – 8:30am

Who Else Wants Your Compliance Data?
Presentation by Health Samurai



HEALTH
SAMURAI

Payers budget CMS-0057-F as a compliance expense. What the money buys is a normalized dataset and a standardized way to hand it to whoever is authorized to receive it. The rule names the recipients it cares about: members, treating providers, other payers, and a public metrics report. It does not name the rest. Medicare Plan Finder, delegated utilization management, and the plan's own analytics run on the same data.

- **Pavel Smirnov, CEO, Health Samurai**
- **Denny Brennan, Executive Director, MHDC**

8:30am – 9:15am

Connecting Policy to Practice: Federal View of the Evolving Health IT Landscape

Join ONC and CMS as they kick off the final day of the Summer Forum with an overview of the current federal health IT landscape, including perspectives on ONC Health IT Certification and the implementation of CMS-0057-F Final Rule and the proposed CMS-0062-P Proposed Rule. This session will explore how these initiatives are advancing interoperability and what they mean for the future of health care data exchange.

- **Molly Prieto, Principal Deputy Director for the Office of Standards, Certification, and Analysis, Office of the National Coordinator**
- **Anthony Polizzi, Chief Patient Experience and Innovation Officer, Office of Health Technology and Products, CMS**

9:15am – 10:00am

The EHR Perspective: CMS 0057 Implementation, CMS 0062P, and the Road Ahead

Join EHR leaders as they discuss their experiences supporting CMS 0057 implementation, including workflow changes, testing readiness, customer engagement, and interoperability challenges. Panelists will share perspectives on the future incorporation of CMS 0062P, the evolving role of EHRs in enabling data exchange, and what the industry must do to achieve scalable, patient-centered interoperability.

- **Hans Buitendijk, EHRA**
- **Shari Medina, MD, Harris Computer**
- **Michael Blackman, MD, Greenway Health**
- **Sean Cotter, Epic**
- **Ida Mantashi, Modernizing Medicine (Moderator)**

10:00am – 10:15am	Networking Break
10:15am – 11:00am	<i>Connecting the Ecosystem: Endpoint Discovery and the Future of Interoperability</i> Sponsored by 1upHealth 1uphealth As CMS advances electronic prior authorization and interoperability, endpoint discovery will play an increasingly important role in enabling trusted, efficient data exchange across the health care ecosystem. This session will explore the technical considerations and implementation challenges of endpoints and how they support seamless connectivity between providers, payers, and other stakeholders. • Donald Rucker, MD, Chief Strategy Officer, 1upHealth • Jeremy Yoon, Senior Product Manager, 1upHealth • Rana Chaudhuri, CareFirst BCBS
11:00am – 11:30am	<i>Beyond Compliance: Driving Awareness and Adoption Across the Health Care Ecosystem</i> As CMS interoperability requirements continue to evolve, health care organizations face the challenge of translating technical regulations into meaningful patient benefits. Hear from leading health care associations as they discuss strategies for communicating the value of APIs, educating members, and helping patients better understand and utilize their health care data. • Samantha Meklir, MGMA • Terrence Cunningham American Hospital Association • Gail Kocher, BCBSA
11:30am – 12:00pm	<i>Beyond the Regulation: Business Considerations for CMS-0062P</i> Successful implementation of CMS-0062P will require more than technical standards—it will demand alignment across business processes, workflows, and stakeholder collaboration. This panel explores the operational considerations, supporting transactions, and interoperability capabilities that organizations should evaluate to successfully prepare for the future of electronic drug prior authorization. • Kevin Day, Cotiviti

- **Donna Campbell, Health Care Services Corporation**
- **Mark Scrimshire, Onyx Health**

12:00pm – 12:30pm

Real-Time Prescription Benefit: The Front Door to Drug Prior Authorization

Learn about the functionality of the RTPB standard and its role in drug prior authorization and patient cost transparency. Discover how real-time access to coverage, cost, and authorization requirements can help reduce prescribing friction, improve medication access, and support a more efficient patient experience.

- **Pooja Babbrah, Executive Vice President, Strategy and Industry Alignment, NCPDP**
- **Margaret Weiker, Vice President, Standards Development, NCPDP**

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