



Canada Health Infoway

**CA-FeX
Review of Comments**

July 22, 2025

Welcome & Agenda

- Purpose:
 - Resolve public comments on CA:FeX v2.2.0-DFT-Ballot
- Today's goals:
 - Review 16 submitted comments
 - Agree on disposition & follow-up actions
 - Record vote results for ballot reconciliation

Disposition Categories (HL7 Terminology)

Category	Definition
Persuasive	Comment accepted; implement exactly as requested
Persuasive with Modification	Comment accepted conceptually; implement with changes
Not Persuasive	Comment rejected; no change
Not Persuasive with Modification	Comment rejected; other clarifying/editorial change made
Considered – Question Answered	Clarification provided; no spec change
Considered – No Action Required	Issue acknowledged; no change needed
Considered for Future Use	Valid point; defer to future release
Duplicate	Same as another tracker
Out of Scope	Outside guide scope
Withdrawn by Submitter	Commenter retracted before vote

Voting Procedure for Each Comment

1. Review the comment under discussion, including the original submission, its interpretation, and the proposed disposition with any associated actions.
2. The chair invites working group members to raise any objections or request further discussion on the proposed resolution.
3. If a member raises an objection that cannot be resolved quickly, the comment is deferred for offline discussion and will not proceed to a vote in the current session.
4. If no objections are raised, the chair invites a motion to approve the proposed disposition.
5. A working group member makes the motion to accept the proposed resolution.
6. A different member seconds the motion.
7. The chair then calls for:
 1. Abstentions (recorded by count)
 2. Objections (recorded by name and count)
 3. All others are assumed to be affirmative votes.
8. If there is a quorum and no blocking objections, the motion carries. The disposition is recorded, and the JIRA tracker is updated accordingly.

Issue ATS-372: Check-mark Instead of Conformance Language

Original
Comment

“There is a checkmark under DocumentReference.read rather than the typical SHALL/SHOULD/MAY language. Please clarify the meaning.”

Interpretation

In the Data Consumer – Option B CapabilityStatement, we display a matrix of permitted interactions. Most rows use explicit RFC 2119 keywords (SHALL / SHOULD / MAY) to indicate expectation. For DocumentReference.read the cell contains only a ✓ symbol.

Ambiguity: A ✓ has no formal definition in HL7/FHIR conformance language; implementers cannot tell whether the operation is mandatory (SHALL), recommended (SHOULD), or merely allowed (MAY).

Root cause (internal review): the JSON fragment for the CapabilityStatement omitted the capabilitystatement-expectation extension on the read interaction, so the Simplifier table component rendered a tick mark by default.

Issue ATS-372: Check-mark Instead of Conformance Language

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Replace the ✓ with explicit “SHALL” in the rendered table for DocumentReference.read.	Aligns with the intent of Option B (metadata only) where reading the actual DocumentReference resource is mandatory.
2	Add the capabilitystatement-expectation extension with value SHALL to the canonical CapabilityStatement JSON.	This is essential because the Simplifier IG rendering tool uses this extension to populate the conformance table. Without it, the tool defaults to displaying a ✓ symbol, which lacks formal conformance meaning. Including the extension ensures that both the machine-readable JSON and the visual representation in the IG accurately reflect the intended requirement level (i.e., SHALL).

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-367 — Sub-sections Should Show in Dropdowns

Original Comment

“Several pages are sub-sections but are not findable from the top of the site. It would be easy to miss them. Note that if sections/pages were numbered, it would be easier for a reader to notice that they had missed a page. [URLs to four hidden pages listed]”

Interpretation

The CA:FeX Implementation Guide (IG) uses Simplifier’s auto-generated navigation tree, which by default only exposes top-level markdown files. Deeper pages, such as Capability-Statements > Server, Technical Context > Data Exchange, are nested two or three levels down and therefore:

1. Do not appear in the main left-hand “hamburger” dropdown (unless the parent page is opened first).
2. Are omitted from the “Quick Links” banner at the top of the site.

Result: Readers can overlook critical sections unless they follow an internal hyperlink. The commenter also suggests section numbering so gaps are visually obvious.

Issue ATS-367 — Sub-sections Should Show in Dropdowns

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Adopt an explicit, numbered navigation structure using Simplifier’s Navigation Overrides (simplifier.yaml → navigation:).	Allows fine-grained control over menu depth and enables sequential numbering (e.g. 2.1 Data Exchange, 2.2 Document Exchange).
2	Surface key sub-pages in the global “Quick Links” banner under Technical Context and Capability Statements.	Provides one-click access without expanding the tree.
3	Add page-level “breadcrumb” header ({{breadcrumb}} include) at the top of every sub-page.	Gives users orientation even when they land via deep link or external search.
4	Update editorial style guide: all new sub-sections must be registered in navigation and use the numbering schema.	Prevents recurrence.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-375 — Don't Require Searching by `_id` or identifier

Original Comment

“It is strange to require support for searching on `_id` for clients; clients that know ids are likely to simply use the read interaction. Furthermore, clients might never search by identifier. Suggest changing `_id` and identifier search parameters to MAY for clients.”

Interpretation

The commenter is pointing out that requiring clients to support search interactions using `_id` and identifier is unnecessary and inconsistent with expected usage:

- If a client already knows the `_id`, a read operation is simpler and more direct than search.
- Not all clients will ever need to search by identifier, especially outside the Patient resource.
- Requiring these searches burdens implementers without clear benefit in many client scenarios.

Issue ATS-375 — Don't Require Searching by _id or identifier

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Change support for _id and identifier searches to MAY for all resources.	Clients are not expected to perform these searches in most real-world workflows.
2	Exception: For Patient.identifier, retain a higher conformance expectation (SHALL or SHOULD).	Patient lookup by identifier is a common and expected use case.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-378 — Use Patient \$match for Finding a Specific Patient

Original Comment

“Instead of requiring the :exact modifier for patient-name search, it is recommended to use the Patient \$match operation with parameter onlyCertainMatches=true to find a single patient with high confidence.”

Interpretation

The commentor proposes replacing the current exact-name search requirement with the \$match operation, which offers probabilistic matching and a deterministic flag (onlyCertainMatches) for higher accuracy. Implementing \$match would introduce:

- A new FHIR operation not presently defined in CA:FeX transactions.
- Potential need for an additional use case and actor interaction.

Given the scope and timelines for v2.2.0-DFT, this change is larger than a simple parameter tweak.

Issue ATS-378 — Use Patient \$match for Finding a Specific Patient

Proposed Disposition  *Considered for Future Use*

#	Action	Detail / Rationale
1	Defer adoption of Patient \$match to a future release.	Requires new operation definition, use-case alignment, and implementer consultation.
2	Retain current :exact search guidance in v2.2.0.	Ensures ballot scope stability while still enabling deterministic lookup.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-376 — Require Code and System When Searching on Tokens

Original Comment

“Existing wording: ‘The client SHALL provide at least a code value and MAY provide both the system and code values. The server SHALL support both.’

Proposed wording: ‘The client SHALL provide both the code and system values.’

Rationale: token searches are unsafe / ambiguous without both parts; values are only meaningful when tied to their system.”

Interpretation

Requiring only a code risks false-positive matches (e.g. identical codes across different vocabularies). The commentor proposes making both components mandatory for all token searches, mirroring common production practice.

Issue ATS-376 — Require Code and System When Searching on Tokens

Proposed Disposition  *Persuasive with Modification*

#	Action	Detail / Rationale
1	Change conformance text to: “The client SHALL supply both system and code; the server SHALL support requests containing both.”	Implements commentor’s wording verbatim.
2	Update CapabilityStatement tables for Option C to mark token parameters as SHALL (system+code).	Keeps narrative and artefacts in sync.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-377 — Don't Use “Subscribed” (could imply FHIR Subscriptions)

Original Comment

“Existing wording: ‘If subscribed, the Health Care Provider receives a notification that new clinical information is available for the patient.’

Proposed wording: ‘The Health Care Provider receives a notification that new clinical information is available for the patient.’

Using ‘subscribed’ could lead folks to think we are suggesting FHIR Subscriptions.”

Interpretation

The sentence lives in UC-02 – Query & Retrieve Document and was intended to be technology-agnostic. The word “subscribed” may be misread as a directive to implement FHIR Subscription, which CA:FeX does not specify.

Issue ATS-377 — Don't Use “Subscribed” (could imply FHIR Subscriptions)

Proposed Disposition  *Persuasive with Modification*

#	Action	Detail / Rationale
1	Replace the sentence with: “The Health Care Provider receives a notification that new clinical information is available for the patient.”	Removes unintended reference to Subscription.
2		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-363 — Clarify/Remove “Token Tied to Certificate” Statement

Original Comment

“When using UDAP, OAuth tokens issued SHALL be tied to the client system’s certificate.”

It is not clear what it means to ‘tie’ a token to a certificate, and that is not described in SSRAA or the UDAP spec. State the expected behaviour—or omit the sentence.”

Interpretation

The phrase “tied to the client system’s certificate” is ambiguous; UDAP/SSRAA do not define a post-issuance linkage beyond including the certificate chain in the JWT header (x5c).

Without further guidance it may confuse implementers about run-time enforcement.

Issue ATS-363 — Clarify/Remove “Token Tied to Certificate” Statement

Proposed Disposition  *Persuasive with Modification*

#	Action	Detail / Rationale
1	Delete the sentence “OAuth tokens issued SHALL be tied to the client system’s certificate” from the Security section.	Removes ambiguous requirement; aligns with Epic’s proposed wording.
2	Retain reference to UDAP JWT header requirements (x5c, alg) already cited via SSRAA.	Ensures implementers still include the certificate chain when signing requests.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-370 — Don't Require Searching Bundle

Original
Comment

“Searching inside of a Bundle is something that many clients and servers will not support. It should not be required by the CA:FeX Capability Statements.”

Interpretation

Epic objects to the current CapabilityStatements that mark Bundle search as SHALL. Their concern: many implementations treat a Bundle only as a response container, not a searchable resource.

Project owner feedback notes that Bundle search underpins Transaction CA:FeX-2A (querying for a document package). Removing it would break that use case.

Issue ATS-370 — Don't Require Searching Bundle

Proposed Disposition

Not Persuasive with Modification

#	Action	Detail / Rationale
1	Retain the Bundle search requirement (SHALL).	Required for Transaction 2A workflow; servers must expose it.
2	Add one-line clarification in the CapabilityStatement intro: "Bundle search is only mandated for systems implementing Transaction CA:FeX-2A; other systems MAY omit it."	Addresses confusion about universal applicability.
3		
4		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-371 — Clarify “SHALL” Interactions on “SHOULD”

Original Comment

“For Option C, many resources are listed as SHOULD in the base capability statement; however, in the Option C capability statement these resources have SHALL requirements on the search-type and read interactions. What does that mean from a conformance standpoint?”

Interpretation

Epic is asking whether a client/server must implement search/read when the resource itself is only recommended (SHOULD). The intent is the usual FHIR conditional rule:

If an implementation elects to support the resource (SHOULD)

then the listed interactions are mandatory (SHALL).

This needs to be stated explicitly.

Issue ATS-371 — Clarify “SHALL” Interactions on “SHOULD”

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Add a clarifying sentence to the intro of each Option C CapabilityStatement: “Where a resource is flagged as SHOULD, any interaction marked SHALL applies only if that resource is implemented.”	Removes ambiguity without changing conformance levels.
2		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-373 — Require Clients to Search by Category, Not Type

Original Comment

“The type search parameter on DocumentReference is listed as required for clients. It is typically more useful to search by category. Suggest switching the requirement to category and not type.”

Interpretation

In real-world workflows, category (high-level classification) is the standard filter (aligns with IPA & US Core).
type (detailed code) is seldom needed and may hinder interoperability.
Current Option B CapabilityStatement marks type as SHALL and omits category.

Issue ATS-373 — Require Clients to Search by Category, Not Type

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Downgrade type search to MAY in Option B CapabilityStatement.	Removes mandatory requirement.
2	Add category search parameter as MAY.	Gives guidance without forcing adoption; aligns with IPA.
3	Update “Search Parameters per Resource Type” table to reflect 1 & 2.	Keeps artefacts consistent.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-364 — Images Aren't Viewable in Tabs

Original Comment

“Images cannot be opened fullscreen; right-click ‘open in new tab’ downloads a .txt file. Likely the PNG MIME type isn’t declared correctly, so examining diagrams is difficult. Zooming the page doesn’t enlarge images.”

Interpretation

Some PNGs were uploaded without the correct content-type, so Simplifier serves them as plain text. Users can't open, zoom, or download the diagrams properly.

Issue ATS-364 — Images Aren't Viewable in Tabs

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Re-upload affected PNGs with correct MIME type and re-link them in the guide so "open in new tab" renders the image.	Ensures that "open in new tab" renders the image normally and allows users to zoom or download diagrams.
2		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-368 — Prefer SMART over IUA

Original
Comment

“IUA is listed as a Symbiotic Specification. SMART on FHIR should be listed here as the preferred OAuth 2 profile.”

Interpretation

The guide currently names IUA as an integration profile but omits SMART on FHIR, which is the OAuth 2 profile most implementers will use. Listing SMART signals the expected direction for Canadian projects.

Issue ATS-368 — Prefer SMART over IUA

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Add SMART on FHIR to the first paragraph of the “Symbiotic Specifications” section and describe it as the preferred OAuth 2 profile (with IUA retained as an alternate).	SMART on FHIR is already the de-facto OAuth 2 profile used by most Canadian and U.S. FHIR deployments, so highlighting it sets clear expectations for implementers. Retaining IUA as an alternative avoids breaking existing implementations that rely on it.
2		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-369 — Don't Duplicate FHIR Core Search Parameters

Original Comment

“Several of the search parameters duplicate search parameters in the base FHIR specification: CAFeXPatientName, CAFeXPatientFamily, CAFeXPatientGiven, CAFeXPractitionerName. These should be derived from the Base FHIR Specification rather than defined by CA:FeX.”

Interpretation

The CA:FeX specification defines its own versions of common search parameters that already exist in the FHIR core specification. This duplication creates confusion for implementers, may trigger validation issues, and makes it unclear which parameter canonical URL should be used. The intent was to clarify expected search behavior, not redefine the parameters, similar to the approach used in US Core.

Issue ATS-369 — Don't Duplicate FHIR Core Search Parameters

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Retire the CA:FeX-specific search parameter resources listed above.	Removes redundancy and avoids ambiguity between CA:FeX and FHIR core definitions.
2	Reference the core FHIR parameters (name, family, given) directly in CapabilityStatements and must-support declarations.	Ensures implementers rely on canonical FHIR definitions, which improves compatibility and tooling behavior.
3	Add a short clarification on the “Search Parameters” page stating that these core parameters are reused unchanged, in alignment with US Core.	Maintains transparency while removing unnecessary artefacts.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-365 — Mandatory Transactions Without Use Cases

Original Comment

“The Mapping Use Cases to Transactions table does not map any use cases to CA:FeX-3C or CA:FeX-3D. These also do not appear on Sequence Diagrams. However, they have an Optionality of R. What does it mean for a required transaction to have no use case?”

Perhaps 3D should be mapped to Use Case 2, and 3C to Use Case 4 (with 2C).”

Interpretation

The commenter has identified a disconnect between the Actor Options table and the Use Case to Transaction Mapping table:

- CA:FeX-3C (FHIR read) and 3D (\$summary) are marked as Required (R) in actor option tables.
- But neither is referenced in any of the documented use cases (UC-1 to UC-5) or shown in sequence diagrams.

This raises confusion about when these required transactions are actually used, and whether their “Required” status is justified.

Issue ATS-365 — Mandatory Transactions Without Use Cases

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Map CA:FeX-3C (FHIR read) to Use Case 4 as an alternate flow.	3C represents a targeted read of a single resource, which fits the UC-4 workflow.
2	Map CA:FeX-3D (\$summary) to a new Use Case 6 (On-Demand Patient Summary) and reference it optionally in UC-2.	Clarifies its use in on-demand summary scenarios, with precedent from PS-CA.
3	Update the “Mapping Use Cases to Transactions” table, related diagrams, and narrative to reflect A and B.	Ensures consistent use-case alignment across the guide.
4	Clarify the meaning of “R” (Required) in the Actor Options section to state: “Required if implementing the associated use case.”	Prevents future confusion by anchoring optionality to use-case adoption.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-374 — Clients Should Be Free to Choose What They Consume

Original Comment

“Clients might not have use cases to consume all data types, but most of the resources are listed as SHALL support search and read. Clients should be free to choose what they consume. Please change these to SHOULD or MAY.”

Interpretation

The Option C (Single Resource Option) CapabilityStatement currently assigns SHALL to read and search interactions across many resource types. Epic notes that this implies clients must support retrieval of all listed resource types, which may not match real-world implementation needs or business context. The intent is to allow clients the flexibility to only consume resources relevant to their use case.

Issue ATS-374 — Clients Should Be Free to Choose What They Consume

Proposed Disposition

Persuasive with Modification

#	Action	Detail / Rationale
1	Adjust the resource-level conformance expectations in the Option C CapabilityStatement to mirror the HL7 IPA Client CapabilityStatement, using SHOULD or MAY instead of SHALL where appropriate.	Aligns CA:FeX with an internationally accepted interoperability baseline while preserving flexibility for implementers.
2	Where CA:FeX has a legitimate need to be stricter than IPA, retain the higher conformance (e.g., retain SHALL for Patient).	Ensures core expectations are met without forcing full support across all resources.
3	Add a short clarification in the guide explaining that conformance to Option C does not imply support for every listed resource, but rather that interaction-level expectations apply if the resource is implemented.	Prevents misunderstanding and aligns with previous guidance in ATS-371.

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled

Issue ATS-366 — Broken Link

Original Comment

“Existing wording: ‘...or HTTP 404 "Not Found" (for details please refer to the [broken link] page)’

This link just seems broken.”

Interpretation

Within the Server CapabilityStatement page, the pagelink macro references a non-existent or misnamed page. As a result, the published guide shows a placeholder error message instead of a proper hyperlink. This degrades reader experience and makes it unclear where to find further explanation of HTTP 404 handling.

Issue ATS-366 — Broken Link

Proposed Disposition  *Persuasive with Modification*

#	Action	Detail / Rationale
1	Replace the broken pagelink macro with a working link to the correct page explaining HTTP 404 behavior (or remove the reference entirely if no such page exists).	Resolves the broken reference and ensures clarity in the rendered guide.
2		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled



Canada Health Infoway

Thank you!

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Let's Connect on Twitter
[@infoway](https://twitter.com/infoway)

XXX

Original
Comment

“XXX”

Interpretation

XXXX

XXX



#	Action	Detail / Rationale
1		
2		
3		
4		

Motion Raised

To be filled

Votes For

To be filled

Objections

To be filled

Seconded

To be filled

Abstentions

To be filled