

## eReferral Working Group Meeting Summary

### Meeting Summary

Meeting Chair: Mark Fernandes			
<u>Date and Time</u>	<u>Location</u>	<u>Note Taker</u>	<u>Next Meeting Date</u>
December 4, 2024, 1:00pm – 2:00pm ET	Virtual	Sadrina Petit, Project Analyst, Digital Health Interoperability	January 8, 2025
<b>Meeting Agenda:</b> <ol style="list-style-type: none"> <li>1. News and updates <ul style="list-style-type: none"> <li>• Ontario v0.12.0 open review</li> <li>• eReferral at Projectathon/Plugathon</li> <li>• CA: eReC v1.1.0 timeline</li> </ul> </li> <li>2. Follow up on Change requests <ul style="list-style-type: none"> <li>• Mechanism to indicate what has changed with an update message</li> <li>• ServiceRequest having multiple performers</li> <li>• Clarification on the use of HealthcareService in messaging</li> <li>• Identifying differences between eReferrals and eConsults</li> </ul> </li> </ol>			
Presenters			
<ul style="list-style-type: none"> <li>• Mark Fernandes – eReferral / eConsult Product Owner</li> <li>• Russ Buchanan – eHealth Centre of Excellence</li> </ul>			
Invited Guests			
Public			

### 1. Welcome and Introductions

M. Fernandes welcomed all participants to the working group meeting. Meeting materials and a recording of the session will be made available on the InfoCentral working group page

### 2. Content Presentation

The Infoway team presented each of the agenda items as outlined above. The meeting aimed to address key updates and discussions to advance ongoing initiatives. Topics included the Ontario v0.12.0 open review, eReferral participation at the Projectathon/Plugathon, and timelines for CA: eReC v1.1.0. The agenda also covered follow-up on change requests, such as mechanisms to indicate changes in update messages, support for multiple performers in ServiceRequest, clarification on using HealthcareService in messaging, and distinguishing between eReferrals and eConsults. These discussions sought to ensure clarity and alignment on critical priorities.

The presentation deck is available [eReferral Working Group Meeting](#)

The video recording is available [eReferral Working Group Meeting](#)

### 3. Action Items

Action Item #	Action Item	Responsible	Due Date	Status
1	Work with Alberta Health to confirm the list of proposed codes for the message header reason to indicate what has changed in an update message	Infoway	January 8, 2025	In Progress
2	Bring forward information on how the healthcare service taxonomy is currently represented in Ontario and any prior work done on this topic	Infoway	January 8, 2025	In Progress
3	Reach out to Ocean to get information on their approach to supporting the request for a first-order element to distinguish between e-consult and e-referral requests	Infoway	January 8, 2025	In Progress
4	Discuss the options for representing multiple performers on a service request, including the extensions available in the Ontario guide, at a future meeting	Infoway	January 8, 2025	In Progress

#### **4. Questions raised during the working group meeting:**

##### **When does the Ontario open review period start, and how long does it run?**

It starts tomorrow and runs until February 14, though concrete details will be confirmed during the open review presentation.

##### **Will the Ontario-specific specification be tested in the Projectathon?**

The Ontario specification testing is planned, but there are uncertainties about having it ready for the December 9 simulator testing. More updates will be provided later.

##### **Why is self-testing with the simulator important before the Projectathon?**

The simulator ensures vendors test their systems for conformance ahead of the Projectathon. This helps make the event smoother, to get systems closer to plug-and-play at the event itself.

##### **Why are there separate Ontario and Pan-Canadian guides?**

The Ontario guide builds on the Pan-Canadian guide with additional requirements to meet Ontario's needs. There is no near-term plan to deprecate the Ontario guide, but the intention is to keep them harmonized to ensure minimal differences.

##### **Wouldn't it be better to incorporate Ontario-specific changes into the Pan-Canadian guide directly?**

The proposed process is to wait for the Ontario guide's review to conclude, incorporate feedback into the Pan-Canadian guide, and then ballot the harmonized version to avoid conflicting feedback from parallel reviews.

##### **Why move the timeline from March to May ballot cycle?**

Moving to May allows more time to discuss the change requests, incorporate Projectathon findings, incorporate feedback from Ontario v0.12.0 review and avoid overloading stakeholders with multiple review cycles during a busy period.

##### **Is the approach of having two separate guides sustainable?**

Feedback highlighted the need for a unified guide to reduce confusion. Many participants agreed that maintaining two guides creates unnecessary complexity and duplication.

##### **Why should I review the Ontario specification if there's another review in March?**

The Ontario specification is undergoing review now because it already exists with VOR commitment and needs harmonization. Feedback from the current process will guide improvements and inform updates to the Pan-Canadian guide. The goal is to gradually align and integrate specifications.

##### **Why are there two separate specifications instead of one unified Pan-Canadian specification?**

The Ontario guide profiles over the Pan-Canadian guide and includes additional elements for jurisdictional needs. The process aims to harmonize over time and eventually reduce the need for separate specifications. This is recognized as a work in progress requiring collaboration among jurisdictions.

### **Can the Ontario guide be phased out after this review?**

The group acknowledged the need to stop duplicating efforts and work toward a unified guide. However, it was noted that harmonization is a gradual process that requires careful planning and input from all jurisdictions.

### **What are the community expectations for harmonization?**

Harmonization will require clear discipline and collaboration among provinces to avoid divergence. Jurisdiction-specific needs should be incorporated as optional extensions or implementation considerations within a unified guide, not separate specifications.

### **What is the proposed timeline and approach for harmonization?**

The proposal suggests completing the Ontario review, integrating feedback into the Pan-Canadian guide, and ensuring that future updates address gaps and reduce redundancies. The Projectathon will also help test alignment between the specifications and identify areas for improvement.

### **How will variations between jurisdictions be managed in a unified guide?**

It was proposed by attendees that variations should be addressed through optional constraints or jurisdiction-specific implementation guidance within the Pan-Canadian guide. This ensures compatibility while allowing for tailored needs.

### **What feedback process will ensure vendor input is considered?**

The review process and Projectathon provide opportunities for vendors to test and provide feedback. Harmonization efforts will prioritize reducing vendor confusion and streamlining implementation requirements.

### **What changes should be made to the guide to emphasize its Pan-Canadian scope?**

Suggestions included adding a bold statement at the beginning of the guide that emphasizes its goal of supporting all jurisdictions in Canada. This could serve as a clear reminder of its national purpose.

### **How would update message reason codes be added to the specification?**

Input from Alberta will be used to create update reason codes. The valueset will be incorporated into the guide's continuous integration build and adjusted based on further feedback on CI build and during balloting.

### **What is being built for HealthcareService in Ontario, and how does it align with existing discussions?**

Ontario's approach involves a taxonomy for labeling healthcare services, which could be revisited in a future meeting to align with prior discussions and ensure consistency. Past workshops also emphasized defining taxonomy to differentiate service types like eConsult and eReferral.

### **Should different types of eRequests (e.g., eConsult, eReferral) have explicit labels?**

There's a recommendation to include these types as separate fields (e.g., a category or extension) in the HSD and service request bundles. This would make it explicit and easier to derive information during processing.

### **How does Alberta manage referrals through its Central Access and Triage (CAT) model?**

Alberta uses a CAT model, where central intake systems manage referrals, ensure completeness, and assign cases to providers. The HSD is simplified for this process, focusing on directing referrals to the correct CAT, which then handles further routing and appointment booking.

### **Should service types be part of a taxonomy or a separate categorization?**

The consensus suggests keeping the taxonomy flexible and using a facet approach for categorization (e.g., submission method), with clear values for service types. This approach supports scalability and clarity.

### **How should Ontario's work on HSD be integrated into broader discussions?**

It was suggested that Ontario present its PHSD work in a future meeting to help understand its modeling and inform integration into the Pan-Canadian context.

### **How should eConsult and eReferral be distinguished in Alberta's CAT model?**

Alberta prefers having an explicit element (an element or an extension) in the service request to differentiate types of referrals. This would simplify processing and improve clarity for CAT systems.

### **How will taxonomy and modeling work proceed?**

Participants agreed to bring forward prior modeling work, jurisdiction-specific examples, and requirements for further discussion. Alberta's CAT model and Ontario's HSD work will serve as references for alignment.

### **How will multiple performers in service requests be represented?**

Several approaches were suggested, including using task owners or allowing multiple performers in service requests. The new Extensions in Ontario's v0.12.0 guide could be evaluated for applicability to this scenario.