



Canada Health Infoway

# Patient Summary Working Group (PSWG)

Date: January 20, 2026

# Agenda

---

- Welcome/Announcements
- Proposed scope of the next release
- Must Support and Obligations
- Next Steps

# Welcome/Announcements

---

- Welcome and Happy New Year!
- Projectathon will take place February 23–26
- PS-CA next release is planned for March/April 2026  
(A detailed timeline will be shared soon)

# What We're Planning for the Next PS-CA Release

---

- **Use Cases**
  - Clarify and improve existing use cases
  - Address priority backlog items
- **FHIR Profiles**
  - Implement Obligations
  - Maintain alignment with CA Core+ and IPS
  - Address priority backlog items
- **Requirements**
  - Review and address priority backlog items
- **PS-CA Exchange Patterns**
  - Review and update PS-CA exchange patterns as needed
- **Projectathon Feedback**
  - Incorporate lessons learned from Projectathon 2026 testing

# Must Support Definition

---

- Must Support addresses requirements for application behaviour while cardinality specifies requirements for information in a resource instance.
- Labeling an element MustSupport means that implementations that produce or consume resources SHALL provide "support" for the element in some meaningful way.
- The flag itself does not specify what support means for a given context.

# Current Must Support in PS-CA - Sender

---

- SHALL demonstrate that the system can produce a value for the Must Support element.
- SHALL ensure that the system can send/relay the data if available and appropriate (pertinent to the current clinical context or patient summary being generated).

# Current Must Support in PS-CA – Receiver

---

- SHALL be capable of processing resource instances containing Must Support data elements without generating an error or causing the application to fail.
- SHOULD be capable of displaying Must Support data elements for human use, or processing (e.g., storing) them for other purposes.
- SHALL be able to process resource instances containing Must Support data elements asserting missing information.

# Obligations

---

- When an element is labelled as "must-support", it SHALL also make clear exactly what kind of "support" is required
- Obligations give us a way to computably specify application behaviour expectations
  - Obligations are expressed using a conformance verb and a code for a given actor

# Obligations cont'd

---

- Actors – who does the Obligation pertain to?
  - PS-CA Producer
  - PS-CA Consumer
- Conformance Verbs – how strict is the requirement?
  - SHALL, SHOULD, MAY, SHALL NOT, SHOULD NOT
- Code – what specifically is the expectation?
  - Obligation Codes

# Example Obligation Codes

---

- **SHALL populate**
  - Conformant applications producing resources SHALL include this element if a value is known and allowed to be shared.
- **SHOULD be able to populate**
  - Conformant applications producing resources SHOULD be able to correctly populate this element.
- **SHALL populate if known**
  - Conformant applications producing resources SHALL correctly populate this element if they know a value for the element, but it is acceptable if the system is unable to ever know a value for the element.
- **SHALL explain**
  - Documentation applicable to Conformant applications SHALL explain how this element is handled.
- **SHOULD display**
  - Conformant applications SHOULD display the value of this element when presenting the data from the resource to a human user.
- **SHALL no-error**
  - Conformant applications SHALL accept resources containing any valid value for the element without error.
- **MAY ignore**
  - Conformant applications MAY not make any use of the value of this element if received.

# Sample Obligation Definition – CA Core+ 1.1.0 DiagnosticReport

**DiagnosticReportCACore (DiagnosticReport)**

- identifier
- basedOn
- status
- category
- code
- subject**
  - reference
  - type
  - identifier
  - display
- encounter
- effective[x]
  - effectiveDateTime
  - effectivePeriod
- issued
- performer
- resultsInterpreter
- specimen
- result
- imagingStudy
- media
  - comment
  - link
- conclusion
- conclusionCode
- presentedForm

DiagnosticReport	DiagnosticReport
0..* Identifier	0..* Identifier
0..* Reference (CarePlan   ImmunizationRecom...	0..* Reference (CarePlan   ImmunizationRecom...
Σ 1..1 code [Binding]	Σ 1..1 code [Binding]
0..* CodeableConceptCACore	0..* CodeableConceptCACore
Σ 1..1 CodeableConceptCACore [Binding]	Σ 1..1 CodeableConceptCACore [Binding]
<b>S O E</b> 0..1 Reference (PatientCACore   Group   Devic...	<b>S O E</b> 0..1 Reference (PatientCACore   Group   Devic...
<b>S O E</b> 0..1 Reference (PatientCACore   Group   Devic...	<b>S O E</b> 0..1 Reference (PatientCACore   Group   Devic...
<b>This element has obligations</b>	
Σ 0..1 Identifier [Binding]	Σ 0..1 Identifier [Binding]
Σ 0..1 Identifier	Σ 0..1 Identifier
Σ 0..1 string	Σ 0..1 string
Σ 0..1 Reference (EncounterCACore )	Σ 0..1 Reference (EncounterCACore )
<b>S O E</b> 0..1	<b>S O E</b> 0..1
dateTime	dateTime
Period	Period
Σ 0..1 instant	Σ 0..1 instant
0..* Reference (PractitionerCACore   Practition...	0..* Reference (PractitionerCACore   Practition...
0..* Reference (PractitionerCACore   Practition...	0..* Reference (PractitionerCACore   Practition...
0..* Reference (Specimen )	0..* Reference (Specimen )
0..* Reference (Observation )	0..* Reference (Observation )
0..* Reference (ImagingStudy )	0..* Reference (ImagingStudy )
0..* BackboneElement	0..* BackboneElement
0..1 string	0..1 string
Σ 1..1 Reference (Media )	Σ 1..1 Reference (Media )
0..1 string	0..1 string
0..* CodeableConcept	0..* CodeableConcept
0..* Attachment	0..* Attachment

**Element id**

DiagnosticReport.subject

**Short description**  
The subject of the report - usually, but not always, the patient

**Alternate names**  
Patient

**Definition**  
The subject of the report. Usually, but not always, this is a patient. However, diagnostic services also perform analyses on specimen

**Requirements**  
SHALL know the subject context.

**Data type**  
Reference (PatientCACore | Group | Device | LocationCACore )

**Constraints**

- **ele-1:** All FHIR elements must have a @value or children `hasValue() or (children().count() > id.count())`

**Mappings**

- workflow: Event.subject
- w5: FiveWs.subject[x]
- v2: PID-3 (no HL7 v2 mapping for Group or Device)
- rim: participation[typeCode=SBJ]
- w5: FiveWs.subject

**Obligations**

Code	Actor
SHALL:populate-if-known	http://fhir.infoway-inforoute.ca/ca-core/ActorDefinition/producer
SHALL:no-error	http://fhir.infoway-inforoute.ca/ca-core/ActorDefinition/consumer

# Proposed Obligation Rules

---

- **Producer**

- If MS 1..1 or MS 1..\*

- SHALL:populate

- If MS 0..1 or MS 0..\*

- SHALL:able-to-populate

- **Consumer**

- SHALL:no-error

- Other potential statements?

- **Consumer**

- handle

- display

- If needed, what conformance verbs should apply?



# Obligations in IPS

---

- Obligations may be different between the creator and consumer of an IPS document, and may also differ by profile and resource attributes. For all obligations, no data should be populated or processed in any way that conflicts with regional laws, regulations or policies.
- Realm-specific implementation guides may apply additional obligations and/or provide additional guidance on the definition of MustSupport. However, they SHOULD identify and document these differences.

# IPS Actor Definitions

---

<u>Consumer (IPS)</u>	An IPS Consumer actor is a system that receives an IPS document and uses the content of this document.
<u>Creator (IPS)</u>	An IPS Creator actor is a system which produces/assembles/creates an IPS document.
<u>Server (IPS)</u>	An IPS Server is a FHIR server acting as an IPS Creator by providing conformant IPS documents in response to FHIR API requests.

# Example of Obligations in IPS Procedure Profile

## 18.30.1.1 Formal Views of Profile Content

Description of Profiles, Differentials, Snapshots and how the different presentations work [↗](#).

Key Elements Table	Differential Table	Snapshot Table	Statistics/References	All								
Name	Flags	Card.	Type	Description & Constraints								
Procedure		0..*	Procedure	An action that is being or was performed on a patient <b>dom-2:</b> If the resource is contained in another resource, it SHALL NOT contain nested Resources <b>dom-3:</b> If the resource is contained in another resource, it SHALL be referred to from elsewhere in the resource or SHALL refer to the containing resource <b>dom-4:</b> If a resource is contained in another resource, it SHALL NOT have a meta.versionId or a meta.lastUpdated <b>dom-5:</b> If a resource is contained in another resource, it SHALL NOT have a security label <b>dom-6:</b> A resource should have narrative for robust management								
ImplicitRules	?! Σ	0..1	uri	A set of rules under which this content was created <b>ele-1:</b> All FHIR elements must have a @value or children								
modifierExtension	?!	0..*	Extension	Extensions that cannot be ignored <b>ele-1:</b> All FHIR elements must have a @value or children								
status	?! Σ	1..1	code	Must have either extensions or value[x], not both preparation   in-progress   not-done   on-hold   stopped   completed   entered-in-error   unknown <b>Binding:</b> EventStatus (required): A code specifying the state of the procedure.								
code	<b>SO</b> Σ	1..1	CodeableConceptIPS	<b>ele-1:</b> All FHIR elements must have a @value or children Identification of the procedure <b>Binding:</b> Procedures - IPS (preferred): SNOMED CT procedure code set or a code for absent/unknown procedure  <b>ele-1:</b> All FHIR elements must have a @value or children <table border="1"><thead><tr><th>Obligations</th><th>Actor</th></tr></thead><tbody><tr><td>SHALL:populate-if-known</td><td>Creator (IPS)</td></tr><tr><td>SHALL:handle</td><td>Consumer (IPS)</td></tr><tr><td>SHOULD:display</td><td>Consumer (IPS)</td></tr></tbody></table>	Obligations	Actor	SHALL:populate-if-known	Creator (IPS)	SHALL:handle	Consumer (IPS)	SHOULD:display	Consumer (IPS)
Obligations	Actor											
SHALL:populate-if-known	Creator (IPS)											
SHALL:handle	Consumer (IPS)											
SHOULD:display	Consumer (IPS)											



MustSupport flag and Obligation shown as red "SO"



Specific obligations of each actor (Creator/Consumer) detailed in table

# Obligations in Ca Core+

---

1. Where there is MS add
  - **SHALL populate-if-known for producer**
  - **SHALL no-error for consumer**
2. Where MS was removed from CA Core+ 1.0 → 1.1 and mapped to CACDI
  - **MAY populate-if-known for producer**
  - **SHALL no-error for consumer**
3. Where there is no MS – no Obligation

For all obligations, no data should be populated or processed in any way that conflicts with regional laws, regulations or policies. For additional context, see the Security and Privacy Considerations section of this implementation guide.



**Canada Health Infoway**

# **Questions and Discussions**

# Next Steps

---

- Continue development work for the next release
- PS-CA Projectathon Support Office Hours: January 22, 10:00–11:00 ET
- Next PSWG session date will be shared in the forum

# Helpful Links

---

## Pan-Canadian Specifications:

- **Access** Pan-Canadian specifications (e.g., PS-CA, CA Core+, HALO, etc.) on [InfoScribe](#)
  - <https://infoscribe.infoway-inforoute.ca/display/PCI/pan-Canadian+Interoperability+Specifications>

## Working Groups:

- **Join** working groups via [InfoCentral](#). To view a list of all available working groups, navigate to InfoCentral | Communities | Working Groups
  - <https://infocentral.infoway-inforoute.ca/en/>

## Projectathon Information:

- **Learn** about upcoming event information and prior event results on [InfoScribe](#)
  - <https://infoscribe.infoway-inforoute.ca/display/PCI/Connectathons%2C+Projectathons%2C+Prototyping%2C+and+Validation>



**Canada Health Infoway**

# Thank you!

## Contact Information

**VISIT OUR WEBSITE**

[infoway-inforoute.ca](http://infoway-inforoute.ca)

**VISIT OUR SURVEY WEBSITE**

[insights.infoway-inforoute.ca/](http://insights.infoway-inforoute.ca/)

**LET'S CONNECT ON LINKEDIN**

[linkedin.com/company/canada-health-infoway](https://www.linkedin.com/company/canada-health-infoway)

**LET'S CONNECT ON INSTAGRAM**

[@infoway\\_inforoute](https://www.instagram.com/infoway_inforoute)