



Canada Health Infoway

Pan-Canadian Service Directory

May 30, 2024

Code of Conduct

- Members to share their opinions on the content presented
- Co-chairs to actively listen and consolidate the opinions and ideas shared during the WG sessions and shared through notes post meeting
- All ideas are welcome; however, priority will be given to content related to the current version of the guide
- Coming to a consensus that everyone “can live with”
 - If all avenues are exhausted through discussion and consensus has not been reached, an online poll (during the WG call and on forums) will be used to reach majority consensus

Co-Chair Selection

Standard Process for Pan-Canadian Specification Development through WG – Examples

Formation	Scope Setting	Requirements	Technical Design	HIT Standards	Conformation
<ul style="list-style-type: none">• Discussion and polls on need of a product• Environmental scan to determine appropriate national and international guidance supporting our work (e.g., US-HSD, IHE mCSD)	<ul style="list-style-type: none">• Defining the product and scope of the specification• Selection of the first set of use cases• Identify actors and roles in the specification	<ul style="list-style-type: none">• Defining the requirements based off of the use cases• Document business and technical requirements to further align to the actors & transactions• Select definition for MustSupport	<ul style="list-style-type: none">• Identify specific FHIR resources expected to be targeted in the workflow• Create integration patterns and sequence diagrams as needed	<ul style="list-style-type: none">• Create relevant capability statements and search parameters• Gather feedback on artifacts created (e.g. through balloting)	<ul style="list-style-type: none">• Testing against specification to see if systems meet the requirements (e.g. Testing at Projectathons)

High-Level Design Principles for National Service Directory from Canada Health Infoway

- 1. *Design initially for initial set of use:*** As the service directory guide cannot be designed for use for all use cases from the get-go, the solution must be catered to initial key stakeholders and users of the guide. This would level-set the use of the service directory across Canada and allow the developers of this guide to build upon its use in later iterations (see principle #3).
- 2. *Build upon the existing in-use guides (i.e. IHE mCSD, US-NDH):*** Build gateways to existing information implementation guides and capitalize on their bandwagon effects (including CA Core+). The goal is to keep the narrative consistent with the style of these implementation guides aligned as the process of testing and refinement continues, so that the changes may be seen consistently reflected across all guides that are being referenced.
- 3. *Extensible and modifiable:*** Similar to the roll-out of a national service directory in the US and internationally, the roll out is based on developing the initial set of core use profiles. Keeping in mind that the service directory has various uses, the need for keeping the service directory open for expansion in scope is therefore necessary.

Exercise

1. Review the definition of a national service directory specification
2. Update/modify the definition to reach majority consensus
3. Determine the content for service directory that will be out-of-scope
4. Select use cases based on the definition and scope defined

Purpose of a definition for SD specification

- Service Directories span large diverse scopes which include multiple functionalities, interactions (e.g., querying, federated services), and actors/behaviours
- Uses of a service directory may vary in the workflow that they can be used in, spanning use over service and service provider information (e.g., Child Nutrition Program [SK] vs Pediatrician)
- Definition impacts focus of guidance on transactions and data model composition (e.g., Referral requests and responses)

Exercise 1 & 2 - Definition for Service Directory Specification

The service directory specification harmonizes how data regarding healthcare services and providers is structured and provides standardized interactions with that information (e.g., Querying service/provider information). This directory would also store relationships between the service, service providers and their roles, organizations, and associated locations, as well as details on how to contact them. This standardization will enable users (regardless of jurisdiction) to search for, locate, and communicate with healthcare providers, and help them search, plan, and choose the right health services for their patient(s) needs.

Note: Not all language defined in this definition will translate to functionality in initial release of Service Directory

Exercise 3 - Out-of-Scope

The initial version of the implementation guide will not cover:

- A directory of instances and its subsequent such use,
- Federated services/functionality,
- Inclusion of actors outside the scope defined within this implementation guide. This is done to avoid complex processes that are outside of the current defined processes of a service directory.
- Security and access considerations

Exercise – Revisited

1. Review the definition of a national service directory specification
2. Update/modify the definition to reach majority consensus
3. Determine the content for service directory that will be out-of-scope
4. Select use cases based on the definition and scope defined

IGUIDE ADVANCED FUNCTIONALITY/CAPABILITY COMPARISON

* FHIR®

Order	Category	Use Case	IHE CSD / *mCSD	IHE HPD	*US HSD	*US NDH	*ON eReC
1	3	Find provider/facility relationships	Hybrid functionality	Hybrid functionality		Hybrid functionality	
2	1	Discover locations by criteria (postal code, city, accessibility, language)	Location/Service based functionality	Location/Service based functionality	Location/Service based functionality	Location/Service based functionality	Location/Service based functionality
3	7	Update provider information	Provider/Organization based functionality	Provider/Organization based functionality			
4	1	Discover a specific social service by criteria (name, type, category, etc.)	Location/Service based functionality	Location/Service based functionality	Provider/Organization based functionality	Location/Service based functionality	Location/Service based functionality
5	1	Discover practitioner location and office hours	Location/Service based functionality	Location/Service based functionality		Location/Service based functionality	
6	1	Discover organizations by criteria (name, type, postal code, city, tax id, etc.)	Hybrid functionality		Provider/Organization based functionality		
7	1	Discover practitioner qualifications	Hybrid functionality	Provider/Organization based functionality			Provider/Organization based functionality
8	5	Provider/program availability (e.g., to support discovery and/or appointment use cases)	Hybrid functionality	Hybrid functionality			
9	7	Add provider information		Provider/Organization based functionality			
10	6	Verification of credentials to support authorization	Provider/Organization based functionality	Provider/Organization based functionality		Hybrid functionality	
11	2	Retrieval of endpoint information to support sharing records	Provider/Organization based functionality	Provider/Organization based functionality		Provider/Organization based functionality	
12	8	Bulk export of service directory		Additive functionality		Additive functionality	Additive functionality
13	8	National/jurisdictional federated discovery	Additive functionality	Additive functionality		Additive functionality	
14	8	National directory of electronic service endpoints	Additive functionality	Additive functionality		Additive functionality	
15	6	Certificate Retrieval	Provider/Organization based functionality				
16	4	Create a resource list for a facility or event	Provider/Organization based functionality	Provider/Organization based functionality			
17	2	Return other ids for provider	Provider/Organization based functionality				
18	4	Generate list of facilities with sorting/filtering	Provider/Organization based functionality				

Service Directory – Summary AOW

Definition

The service directory specification harmonizes how data regarding healthcare services and providers is structured and provides standardized interactions with that information (e.g., Querying service/provider information). This directory would also store relationships between the service, providers, and organizations as well as details on how to contact them. This standardization will enable users (regardless of jurisdiction) to search for, locate, and communicate with healthcare providers, and help them search, plan, and choose the right health services for their patient(s) needs.

Out-of-Scope

This version of the implementation guide will not cover:

- A directory of instances and its subsequent such use,
- Federated services/functionality,
- Inclusion of actors outside the scope defined within this implementation guide. This is done to avoid complex processes that are outside of the current defined processes of a service directory.

Next Steps

- Establish the base guide used to support the creation of the upcoming service directory specification
- Select and socialize name for the service directory
- Provide discussion on actors, actor profile requirements, and the roles that are present in the service directory

Next Meeting: June 6th.

see the Forum for a Doodle Poll link to determine the time



Canada Health Infoway

Thank you!

Contact Information

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infoway-inforoute.ca

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insights.infoway-inforoute.ca/

Let's Connect on LinkedIn
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US NDH – National Directory Extended Use Case List

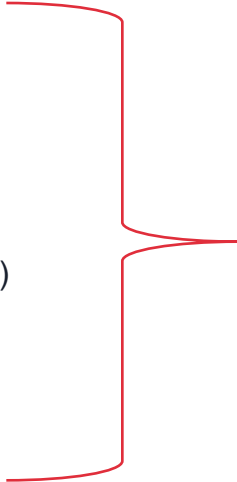
- [Support discovery of electronic service information to enable the electronic exchange of information.](#)
- [The NDH Consumer application help patients seeking healthcare providers](#)
- [Utilize the NDH to locate endpoints for payer-to-payer API interactions](#)
- [Utilize the NDH to verify the legitimacy of requesting providers for Provider API interactions](#)
- [Utilize the NDH to find a practitioner practice with multiple organizations](#)
- [Utilize the NDH to find a practitioner and the practitioner's endpoint for payer](#)
- [Use cases for supporting IHE networks](#)
- [Push-based Referral Use Case](#)
- [Discovery a HIE endpoint via the NDH](#)
- [Associate an organization with an insurance plan that operates without any network.](#)
- [Relationship use cases](#)
- [Subscribe to receive real-time notifications when data is created, updated, or deleted on the NDH server](#)
- [Bulk export to access large volumes information on demand](#)
- [National Directory Scheduled Bulk Data Export](#)

US HSD - Human Services Directory Use Case List

- Healthcare providers searching for services/resources that may help address clients' unmet social needs to initiate social care referrals
- Consumers seeking information on available services provided by local community-based organizations
- Healthcare payers offering care management programs and care coordination seeking community services to help improve their member's health outcomes and quality of life

IHE HPD – Extended Use Case List

- Provider Information Query Transaction Use Cases
 - Yellow Pages Lookup
 - Query providers and their associations for Social Services Disability Determination
 - Emergency Responders Identification in planning for an emergency event
 - Provider Authorization and lookup during an emergency event
 - Forwarding of Referral Documents to a Specialist or Hospital (e.g., electronic address lookup)
 - Keeping agency provider information current
 - Providing Personal Health records to a new Primary Care Physician
 - Certificate Retrieval
 - Language Retrieval
- Provider Information Feed Transaction Use Cases
 - Add Provider – may be driven by a variety of actors e.g., self, agent-driven, entity (in/outside Provider Information Directory), credentialing organization
 - Update Provider (add/delete/change) – may be driven by a variety of actors e.g., self, agent-driven, entity (in/outside Provider Information Directory), credentialing organization
- Provider Information Query Federation Use Cases
 - State HIE onboarding of local provider directories
 - State HIE federated discovery service against local provide directories
 - National directory/local directory operator to provide services
 - National directory of electronic service endpoints



Use Cases revolve around query to support:

- “Open-search” by criteria (specialty, languages supported, availability),
- Retrieval of individual/ organization details (e.g., contact details, endpoints)
- Verification of credentials
- Re-distribution of information

IHE CSD – Extended Use Case List

- Health Worker Staff Levels (e.g., find provider/facility relationships, summarized by health worker type)
- Provider Availability Query (e.g., find services that match location and criteria for surgeon, execute FreeBusy request to identify availability)
- Other Provider Information Query Use Cases
 - Provider Authorization and lookup during an emergency event
 - Keeping agency provider information current
 - Providing Personal Health records to a new Primary Care Physician
 - Certificate Retrieval
 - Language Retrieval
- Specific other use cases supported/assisted by the CSD
 - Generate a list of facilities with sorting
 - Search for facilities by name, view operational details about each facility
 - Quantify facilities & locations based on service levels and types, understand resources for a given facility
 - Filter facilities by implementation partner, service and region, comparison view
 - Filter facilities by service, admin hierarchy, view in web application, along with facility details
 - Return enterprise ID for provider that matches unique ID
 - Query for Healthcare Professional using a variety of parameters

IHE mCSD – Extended Use Case List

- **Practitioner Query** - Finding a suitable specialist, taking into consideration the location and specialty of the specialist
- **Provider Lookup During an Emergency Event** – mCSD service can be queried to quickly identify and grant permission to credentialed providers to enter the scene
- **Cross-jurisdictional Site Management** – Share site lists and implement identifier mapping between the sites in these lists
- **Master facility list** – Minimum data set to uniquely identify, locate, and contact a specific facility; based on recommendations from the WHO
- **HIE Membership Discovery** – To identify active organizations and navigate dynamic business relationships
- **HIE Endpoint Discovery** – An HIE publishes a directory that contains all of its member organizations and their electronic endpoints