



Canada Health Infoway

Patient Summary Working Group (PSWG)

May 9, 2024

Allana Cameron, Senior Product Manager, Patient Summary
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Agenda

- 1 Welcome & Updates
- 2 British Columbia's Patient Summary Progress
- 3 PS-CA: Work In Progress
- 4 Patient Summary Change Management Updates
- 5 Next Steps

Welcome & Updates

- PS-CA v1.1.0 DFT was released on April 12, 2024. Please refer to the following [InfoCentral post](#) for more details on the following two updates:
 - TGZ package is now available on Simplifier.net
 - Details about the transition from the Canadian Vaccine Catalogue to the National Vaccine Catalogue: PS-CA v1.1.0 DFT does not use the CVC ValueSets, and is instead using equivalent ValueSets hosted on the Terminology Gateway. The CA Core+ similarly uses the same ValueSets
- Feedback can be provided via Jira:
 - PSWG members can request access in a WG meeting or by emailing interoperability@infoway-infroute.ca.
 - You will receive automatic notifications when your submissions receive comments or reach milestones during the review process.
 - You can find a Jira Feedback User Guide [here](#) and a link to a Jira demo video [here](#) .

Patient Summary Progress in British Columbia

Naomi Monaster

Clinical Informatics Lead, Patient Summary
Connected Health System | Digital Health Innovation
Provincial Digital Health and Information Services

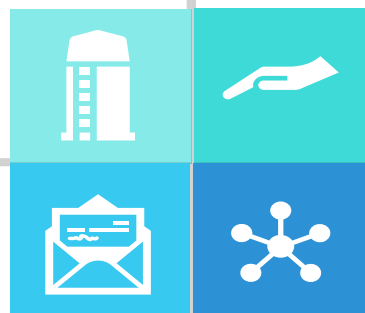
Florin Negoita

Solution Architect, Patient Summary
Connected Health System | Digital Health Innovation
Provincial Digital Health and Information Services

Patient Summary Scope of Problems

Data Silos in Healthcare

Healthcare providers face **significant barriers in sharing data**, due to data often being siloed in acute and primary care systems, leading to **fragmented ‘transitions in care’ coordination**.



Patient Safety

Patient safety is at risk when providers, healthcare delegates, patients and leaders **cannot access complete, near real-time clinical data**, which **impacts their ability to make informed decisions and coordinate care**.

Provider Compensation

Historically, providers **have not been compensated for creating patient summaries leading to disincentives in their preparation**.

Interoperability Challenges

Lack of alignment with Pan-Canadian standards leads to limited ability to share data between systems across sector.

Provider Documentation

Historically, **Primary Care Provider information has not been shared with others unless as part of a specific referral process**. As a result, Providers have not historically seen their general clinical information as having value to others and do not organize their day-to-day charting in a way that can be effectively shared in a structured way.

What is a Patient Summary?

- A **Patient Summary is a point-in-time summary** containing a **standardized set of key clinical and contextual information** about a **patient's health and treatment**.
- A Patient Summary is **not confined to a single Condition or tailored to a single Specialty**
- Its **Purpose** is to bridge the gap in patient care between different care settings by:
 - Reducing the need for providers to spend time looking for client information in different systems, and
 - Reducing the need for patients to repeatedly answer the same questions during transitions in care
- **BC has committed to aligning** the Patient Summary sharing work **with Canada Health Infoway's pan-Canadian Patient Summary Specification (PS-CA)**.

Patient Summary Project Objectives

Key Objectives & Benefits



Near-Term Objective (Release 1)

Establish a **Patient Summary sharing standard in BC aligned to PS-CA** so a clinician can Generate a **transactional point-in-time patient summary** and share it from **one clinical endpoint to another** (e.g., from a clinic EMR to a hospital CIS).

Provider-Centric Benefits

- **Streamlined Patient Information:** Increased access to patient information at the point of care
- **Efficient Data Retrieval:** Optimize cross-system patient information retrieval
- **Improved Care Coordination:** Based on information provided
- **Improved Patient Interaction:** More face time with patients
- **Reduced Fax Usage**



Long-Term Objective

Enable **providers and patients to access on-demand patient summary** via provincial data or **Clinical Data Repositories (CDRs)** to facilitate **more informed and coordinated transitions of care** (e.g., patient transfer of care).

Patient-Centric Benefits

- **Patient Experience:** Enhance patient experience through more comprehensive health history overview
- **Streamlined Health History:** Reduced need to repeat health-related story
- **Safety:** More information means less risk of missing information related to treatment
- **Time Savings:** Reduced duplication of medical and clinical tests

Transactional Patient Summary

Use Case: Admitted to Emergency Department (Proactive & Responsive)



PRIMARY CLINIC EMR



Primary Care Provider
determines Patient Summary
is required



Acute Care Provider
determines Patient
Summary is required



HOSPITAL CIS

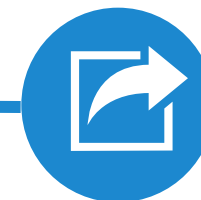
*Clinic EMR receives
Notification*



PCP **launches**
auto-populated
PS template in EMR
to create a PS



PCP **confirms**
and edits PS
content in EMR



PCP **submits** PS from
EMR to Hospital CIS

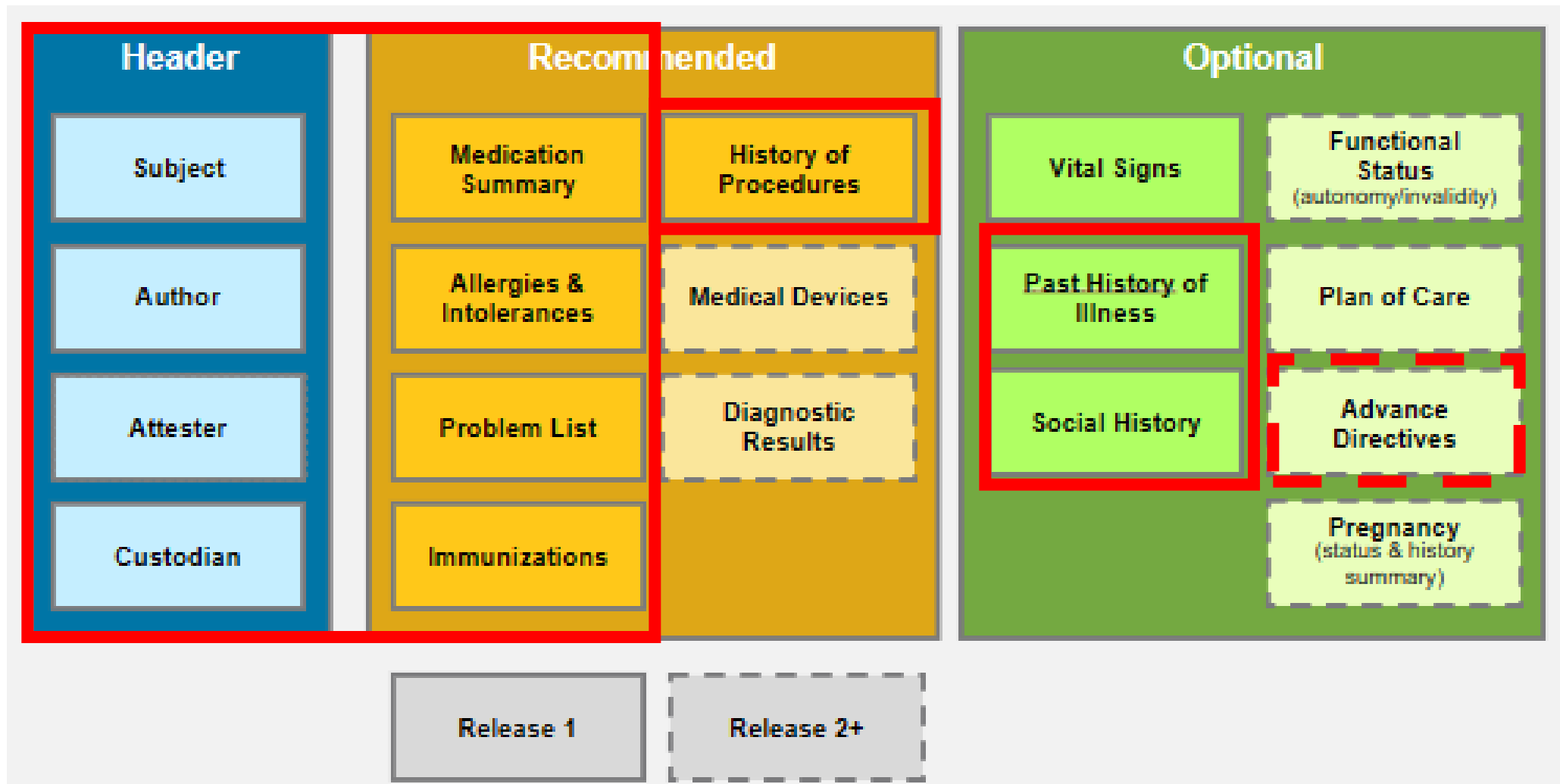
*Hospital CIS receives
Notification*



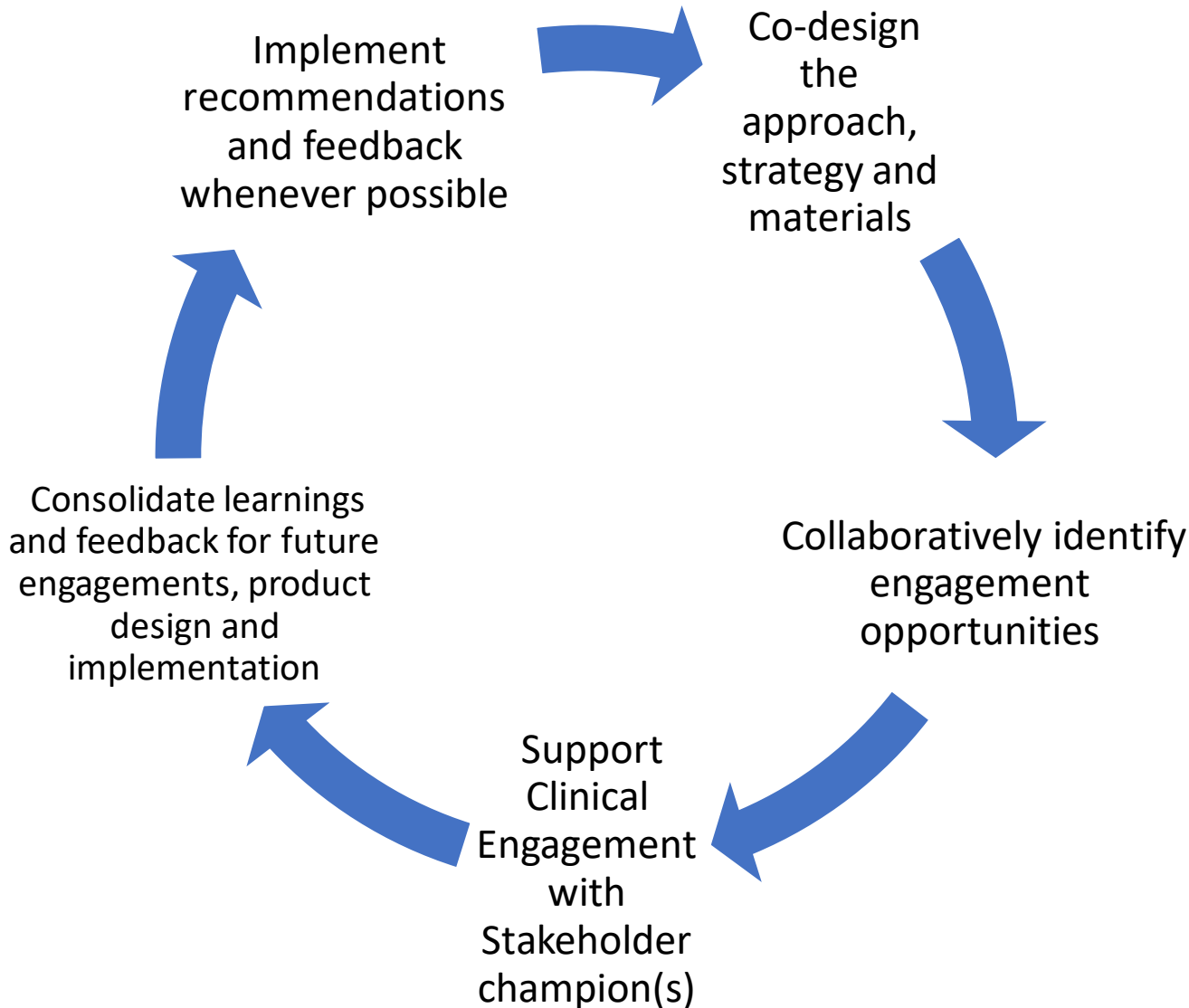
Site user
views PS in Hospital
CIS

Proposed In-Scope Components

Release 1 (Draft)

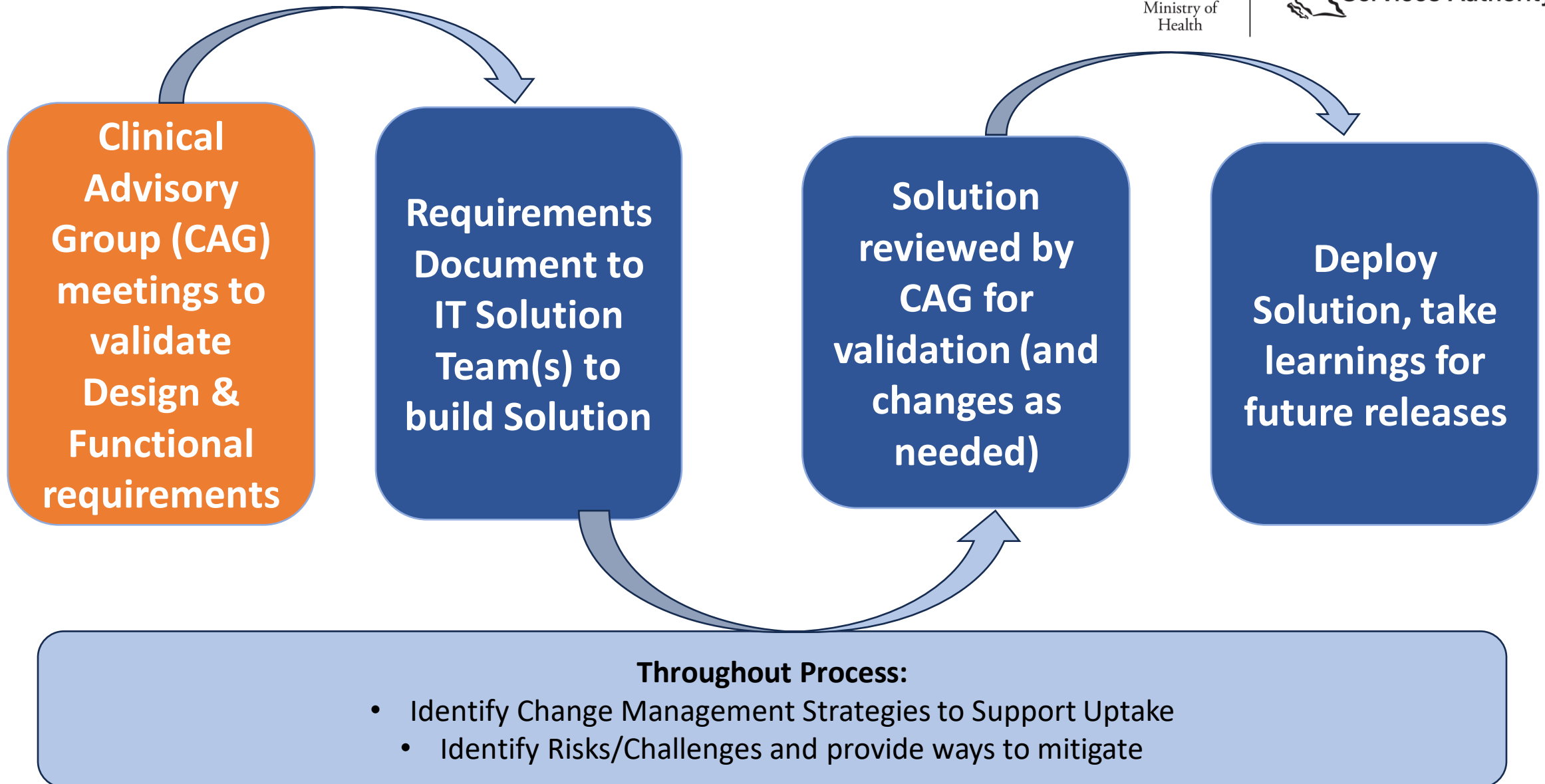


Patient Summary Engagement Strategy

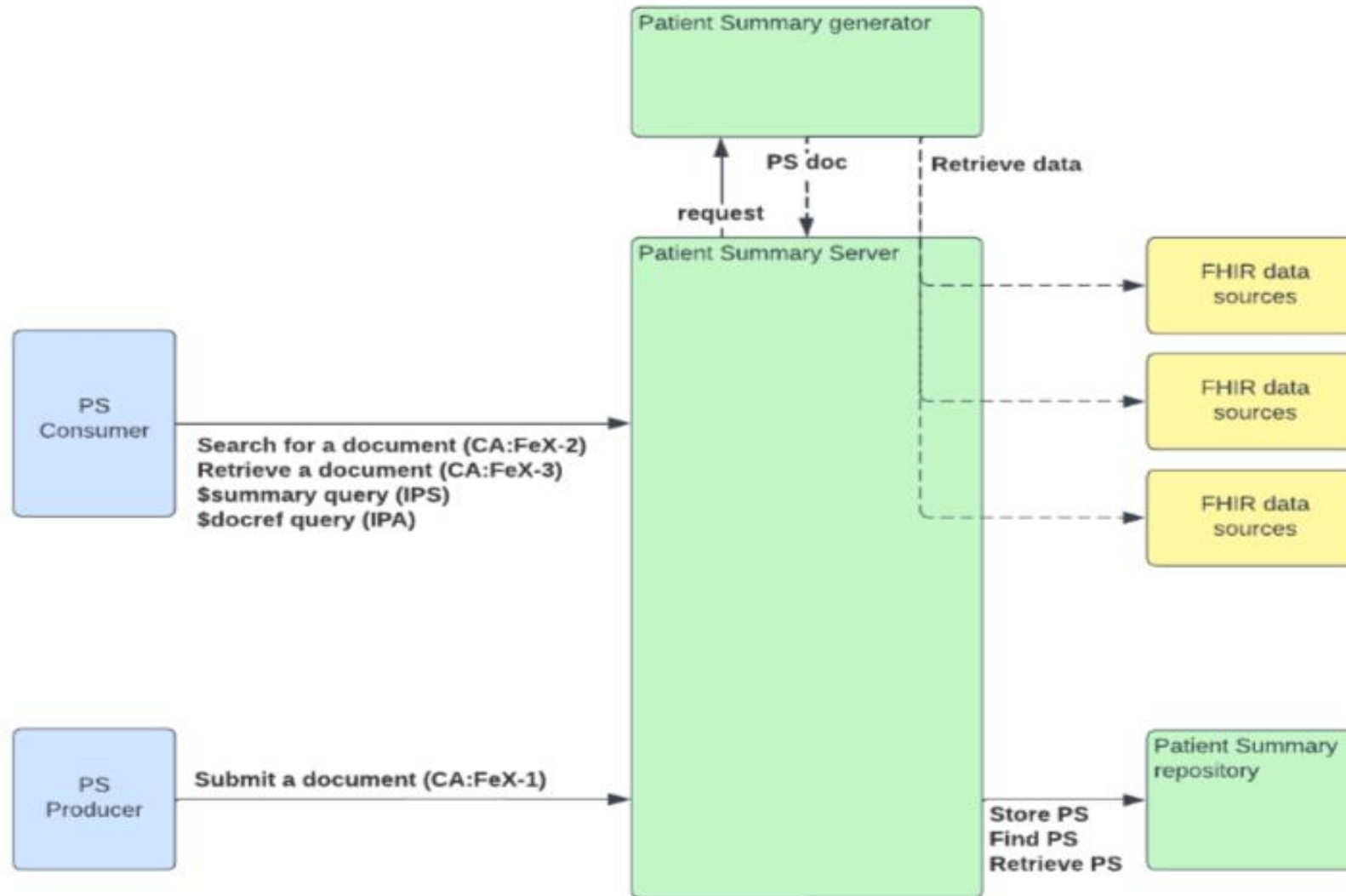


- Organizational Leaders identified
- Leadership team providing direction on: which groups/providers to engage, when, how and with what content/requests
- Sessions co-led by Clinical Informaticist and Provider resource to gather clinical and workflow requirements and solicit feedback on PS-BC initial offering and future enhancements
- Decisions and feedback documented and shared through a variety of tools and forums

Patient Summary Project Process



PS Solution Architecture



Patient Summary Change Management Updates

Anne Baldwin

Director of Change Management & Adoption, Connected Care
Canada Health Infoway

Infoway – Supporting Successful Change & Adoption



Infoway supports pan-Canadian needs by working closely with partners to enable change & adoption.

Change & Adoption Mechanisms

1

Interoperability Roadmap Support

Support jurisdictions to manage the change needs towards successful adoption & use of digital health initiatives.

- Providing subject matter expertise related to change activities in context to the jurisdiction & initiative including:
 - clinician & partner engagement, vendor involvement, workflow analysis & fit analysis, training/education, implementation, patient involvement, progress monitoring & success criteria.
- Providing resources (documents, tools, etc.) on interoperability topics that will help: a) increase awareness & understanding of digital health interoperability topics, b) build knowledge on digital health tools & solutions, and c) encourage adoption & on-going use of interoperable health systems
- Providing onsite site or remote support for implementation.

2


Pan-Canadian Sharing & Connecting Jurisdictions & Clinical Communities

Coordinating & sharing “lived” experiences amongst jurisdictions to leverage learnings.

Patient Summary Work in Progress

The background features a white area on the left and a dark blue area on the right, separated by a curved white line. A red triangular shape points upwards from the bottom right corner.

Key Considerations When Implementing the Patient Summary

W WHY	W WHO	W WHAT	H HOW
			
<p>What are the Key Challenges to be Solved with the Patient Summary? (e.g., unattached patients, cross-border care)</p>	<p>Who will Contribute to and Access the Patient Summary? (e.g., primary care physicians, patients)</p>	<p>What Data Will Be Included in the Patient Summary? (e.g., which data domains from the PS-CA are available & where does the data reside?)</p>	<p>How will the Patient Summary be accessed/used? (e.g., which tools will be used to access, consume & display the PS?)</p>

Why the Patient Summary? How can it help?

W

WHY



What are the Key Challenges to be Solved with the Patient Summary?
(e.g., unattached patients, cross-border care)

- What are the key challenges to be solved by the Patient Summary? Providing **essential healthcare information about a patient...**
 - Requiring chronic care
 - Who cross-borders for care (e.g., NB patients seeking care in NS)
 - Who do not have a Primary Care Provider (unattached patients) - ensuring they have access to their health care information at points of care, allowing more time to focus on care versus having to remember & repeat their medical information
 - In the midst of transitions in care (e.g., hospital, community, long-term care, etc.)
 - In a collaborative care environment (e.g., Pharmacist viewing PS)
 - Requiring support from First Responders

UC-04: PS-CA Created On-Demand

1



Health Care Provider (HCP) requires additional information to support decision-making while treating a patient and/or determines that a Patient Summary should be prepared and shared with another HCP

2



HCP requests a new Patient Summary to be created (i.e., on-demand) from an available data source(s) (e.g., Clinical Data Repository) to support decision-making

3



Receiving system (e.g., CDR) receives request, retrieves relevant patient data, applies business rules, and renders the Patient Summary information for consumption

4



HCP receives the Patient Summary and can optionally, curate it and consume it into their own clinical system and share it with other HCPs

UC-05: Patient-Mediated Access & Exchange



1

Patient **receives care** & the Health Care Provider updates patient's health care information



2

Patient **accesses their health record** via a mobile application and initiates the process of generating a QR code with access to their Patient Summary



3

Patient is presented with privacy & security measures (e.g., consent notice, password, QR code timeout) and provides their **consent & security instructions**



4

Patient Summary is displayed to the Patient in the health application on their mobile device and a **QR code is generated**



5

Patient visits a different HCP and **presents QR code** via their mobile device to health care provider

6

Health care provider **scans QR code, enters required security prompts** (e.g., password/PIN) and views the PS on their own device. Optionally, HCP imports/saves the Patient Summary within their clinical system

HOMER J THOMPSON
Date of birth: April 6, 1991

Problem List

Medication Summary

ACCEL FLUOXETINE 10MG SWALL
Authorized On: January 9, 2024
Dosage: 1 pill per day for 20 days
Active

ACCEL CELECOXIB 100MG SWALL
Authorized On: November 9, 2023
Dosage: 1 pill per day for 10 days
Active

Allergies and Intolerances

Substance with penicillin structure and antibacterial mechanism of action (substance)
Allergy to medication
Onset Date: 2010
Confirmed Criticality: High

Cashew Nut
Allergy to food
Onset Date: 2010
Confirmed Criticality: High



Scan this QR code to view a sample patient summary for: Homer J Thompson

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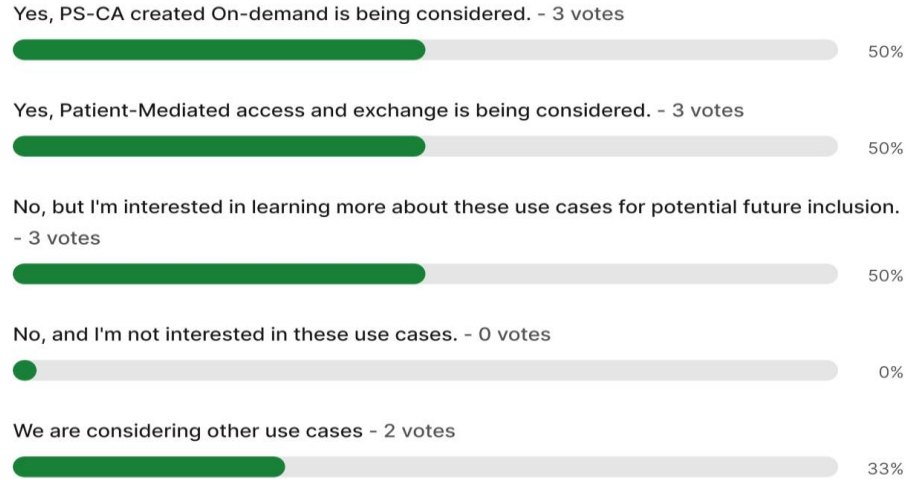
Next Steps

- Development of PS-CA v2.0.0 DFT content
- Meeting with additional jurisdictions to discuss opportunities for implementing the Patient Summary
- Represent Canada's Patient Summary journey and requests in May at the HL7 Connectathon in Dallas, Texas
 - If your organization has a particular interest in the Plan of Care and/or Advance Directives data domains, we'd like to hear from you!
- Continue to engage with international communities for collaboration opportunities and learnings

Slido Exercise Results

Are the use cases presented part of the PS-CA development roadmap in your jurisdiction?

Multiple Choice Poll 6 votes 6 participants



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Are there any other use cases being considered in your Jurisdiction?

Open text poll 4 responses 4 participants

- Anonymous
Referral to specialized services
- Anonymous
From Epic (vendor, not jurisdiction) - we should consider encounter summaries as well
- Anonymous
primary care information exchange
- Anonymous
Inpatient discharge summary

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One use case was raised outside the poll:

- Use case to support First Nations, especially leveraging Social Determinants of Health as part of PS-CA.



Canada Health Infoway

Thank you!

Contact Information:

interoperability@infoway-inforoute.ca

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infoway-inforoute.ca

VISIT OUR SURVEY WEBSITE

insights.infoway-inforoute.ca/

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linkedin.com/company/canada-health-infoway/

LET'S CONNECT ON TWITTER

[@infoway](https://twitter.com/infoway)

Helpful Links

Published specifications (available on InfoScribe):

- [PS-CA v1.1.0 DFT-Ballot](#)
- [CA:FeX v2.0.0 DFT-Ballot](#)
- [CA Core+ v0.1.0 DFT-Ballot](#)

Working Groups (hosted on InfoCentral):

- [Patient Summary](#)
- [eReferral](#)

Projectathon Information (available on InfoScribe):

- [Overview of Projectathons](#)
- [2023 Final Report](#)

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ARE THE USE CASES PRESENTED PART OF THE PS-CA
DEVELOPMENT ROADMAP IN YOUR JURISDICTION?

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ARE THERE ANY OTHER USE CASES BEING
CONSIDERED IN YOUR JURISDICTION?