



Canada Health Infoway

Patient Summary Working Group (PSWG)

**Kick-off Meeting
October 24, 2023**

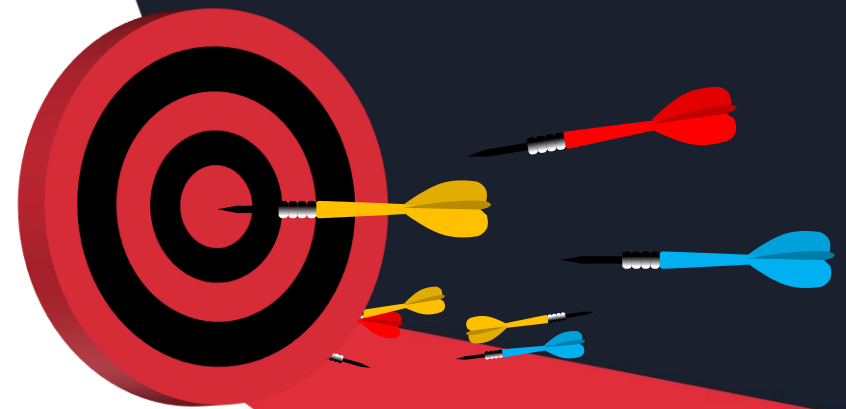
**Allana Cameron, Product Manager, Patient Summary
Alex Reis, Director, Digital Health Interoperability Portfolio
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Sheridan Cook, Standards Lead
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Agenda

- 1 Patient Summary Working Group Objective
- 2 Working Group Structure and Key Activities
- 3 Specification Review Process Changes
- 4 PS-CA: What's Next and Progress to Date
- 5 Next Steps

PSWG Objective:

Collaborate on the various aspects of creating, distributing, and consuming a health records **summary for a patient** resulting in a **harmonized pan-Canadian specification** that can be implemented across the country to **improve Provider access to Patient data** at the point of care and improve care coordination.



Patient Summary Working Group

STRUCTURE

- Identify the stakeholder groups that should participate (clinical, business, technical, etc.)
- Determine cadence for working group sessions (e.g., bi-weekly; potentially more during the balloting cycle)
- Confirm the approach for reviewing content and providing feedback (e.g. InfoScribe and InfoCentral)

Patient Summary Working Group

KEY ACTIVITIES

- Attend WG meetings and participate in the content discussions
 - Agenda items will be prepared by the WG chair who will share the agenda in advance of each meeting via the WG forum
- Validate the scope of work for respective specification releases
- Provide guidance/input (e.g., knowledge exchange, lessons learned, etc.) toward the discussion (e.g., use cases, potential change requests to the specifications, etc.)
 - If topics arise that cross initiatives (e.g., architectural decisions), the chair will triage item(s) to the supporting SMEs/working group(s)
- Participate in balloting cycle (this includes reviewing the feedback and voting on the decisions)
- Be a champion within your organization to encourage participation in providing feedback into the public review cycles

Specification Review Process Changes

To date, the Patient Summary team has used an internally defined, albeit common process, to conduct the open-review period and collection of feedback from the community, used to inform the direction of the specifications.

Going forward, the specification review process will follow pan-Canadian balloting rules for balloting Draft for Comments and Trial Implementation material.

Balloting will align with international standards and emerging best practices for standards community practices.

- Infoway will host an educational webinar to provide details about the balloting process.

PS-CA

What's next and progress to date!

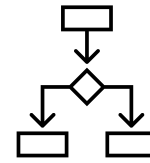
Change Management Focus for FY2023/24

Alongside the roadmap activities and other key enabler (e.g., vendor mobilization, trust framework), the change and adoption program is expected to expand to reflect the criticality of driving change in people and structures delivering and using digital health solutions

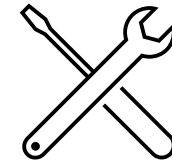
Stream #1: Support Patient Summary Implementation



Education for Vendors/Clinicians



Clinician Input into Workflow



Awareness & Buy-In Resources

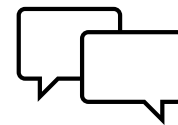
Stream #2: Establish Program for Clinical Leadership and Relevance, Awareness and Information Sharing



pan-Canadian Clinician Community



Clinical Use Cases



Clinician Input pan-Canadian Workflow/ Products



Roadmap Awareness & Buy-In



Knowledge Sharing/ Education

Building a Pan-Canadian Clinician Program

pan-Canadian Clinician engagement is a key enabler to realizing Roadmap adoption

Vision:

Partner to organically grow a broad, diverse self-sustaining network of pan-Canadian clinicians and health professionals that will share ideas, knowledge, tools, and ideas with each other, industry and implementers through on-line and in person channels.

Approach:

Opportunities will be publicised with partners for time-limited or ad-hoc, fit-for-purpose working groups, or online asynchronous methods.

*Clinician time will be compensated.



Task Force/Workshops
(e.g. Clinical Use Case
Development/Workflow)



Champion/advocate for an
interoperable health care system



Providing individual input on
digital health topics through
online mechanisms

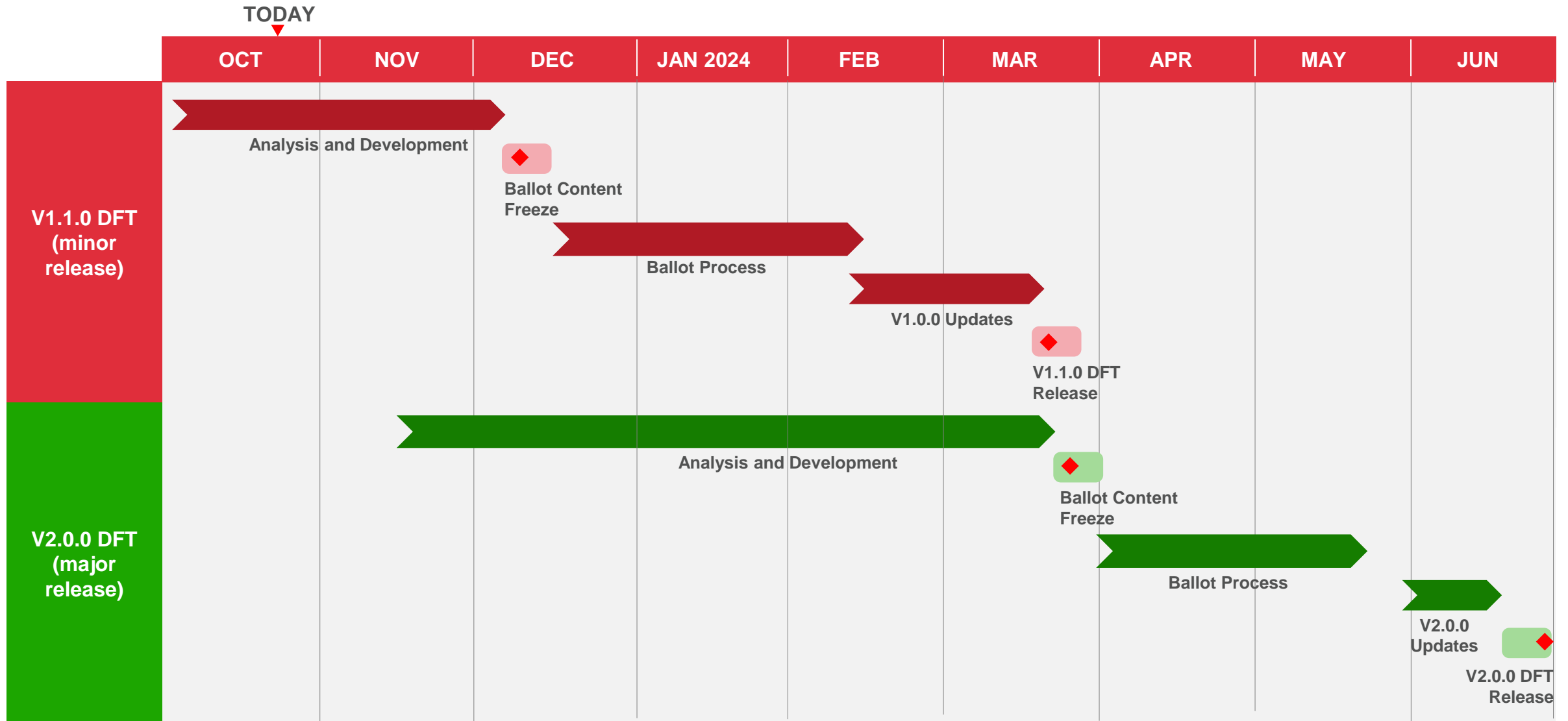


Assist with identifying
barriers/solutions to pan-
Canadian adoption (e.g. consent,
concerns about sharing, etc)



Identify and support
education/training opportunities
(e.g Value of SNOMED CT)

Patient Summary High-Level Timeline



PS-CA v1.1.0 DFT Proposed Scope

The proposed scope for v1.1.0 DFT includes changes to profiles (and guidance) to accommodate backlog items flagged for a minor release, including:

- ❑ PS-AB change requests
- ❑ IPS CI Build changes for alignment
- ❑ Additions/updates to data domain profiles
- ❑ Minor edits that introduce upcoming use cases
- ❑ Minor edits to re-introduce CA:FeX-2B (Search Against Hybrid Documents Repository – a more scalable method of searching for FHIR documents)

❖ Balloting targeted for January 2024

PS-CA v2.0.0 DFT Proposed Scope

The proposed scope for v2.0.0 DFT includes the following, for a major release, including:

Reflect the needs of PTs to support the adoption of PS-CA

- Include new and/or modified use cases e.g., on-demand access, backlog items from review cycles & Projectathon output
- Incorporate learnings from the PT trial implementations
- Will drive out requirements for additional reference architecture support (e.g., additional transactional options in CA:FeX)

Align with IPS

- Supports international alignment and onboarding of PTs interested in data domains not included in v1 such as advance directives plan of care)

Align with CA Core+

- Supports alignment to the national common and domain-specific data exchange (i.e., FHIR profiles) that is informed by the pCHDCF (pan-Canadian Health Data Content Framework)

❖ **Balloting targeted for May 2024**

Patient Summary Progress

PS-CA v1.1.0 DFT

- ❑ Change items for the minor release PS-CA v1.1.0 DFT have been identified and work is in progress.

PS-CA v2.0.0 DFT: Analysis of scope is underway, including:

- ❑ Use Case analysis of:
 - ❑ PS-CA v1.0.0 TI use cases for potential updates
 - ❑ New use case(s) (e.g., requesting a PS on demand)
- ❑ Data model analysis to ensure:
 - ❑ Alignment with CA Core+
 - ❑ Alignment with IPS: Medical Devices, Diagnostic Results, Advance Directives, Pregnancy, Functional Status, Plan of Care
 - ❑ Analysis of current data domains in PS-CA v1.0.0 TI to align with IPS.
 - ❑ Requested data models from PTs to analyze differences between the additional data domains and PT data models

Patient Summary Implementations

- ❑ Three PTs are working toward limited production roll-outs of Patient Summary! Infoway will be working alongside them in areas of change management, data model and localizations, and potentially vendor implementation support, if needed.

PSWG Next Steps

- ❑ PSWG chair will schedule the next working group meeting according to the agreed-upon meeting cadence with the goal of confirming the scope for PS-CA v1.1.0 DFT.
- ❑ PSWG members to review PS-CA v1.1.0 DFT proposed content as outlined in this deck and provide feedback either:
 - Via the PSWG forum (e.g., upcoming requirements in your jurisdiction or organization that we should consider). This will allow others to reply.
 - At the next WG meeting
 - Note: you may also provide feedback on the PS-CA v2.0.0 DFT scope, however we will aim to confirm the PS-CA v1.1.0 DFT scope first.

Helpful Links

Published specifications (available on InfoScribe):

- [PS-CA v1.0.0 TI](#)
- [CA:FeX v1.0.0 TI](#)
- [CA:FeX v2.0.0 DFT](#) (white paper, recorded video, and draft implementation guide)

Working Groups (hosted on InfoCentral):

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

Projectathon Information (available on InfoScribe):

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



Canada Health Infoway

Thank you!

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