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Health Record Overview Presentation Guide v1.1

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National E-Health Transition Authority

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Table of contents

1 Introduction

1.1 Purpose

This document is a presentation guide for the Personally Controlled Electronic Health Record (PCEHR) Health Record Overview (HRO), frequently referred to as the "View" within this document.

This guide provides the detail for presenting the View in vendor clinical information systems (CIS). The design is based on previous presentation guides to ensure consistent display, functionality, and to reduce clinical risk.

In the past, PCEHR views have been returned as a clinical document and a supporting Clinical Document Architecture (CDA®) implementation guide has been provided to assist implementers. Given that the Pathology Report View will be returned as custom XML rather than as a clinical document, this document has been expanded to provide information and guidance on the use of the Pathology Report View custom XML.

1.2 Intended audience

This document is intended for all interested stakeholders including:

- clinical peak bodies, representative groups, and subject matter experts;
- hospitals and health departments that are planning, implementing or upgrading eHealth systems;
- software vendors, software developers, and designers developing eHealth system products;
- jurisdictions, health service providers, and health software representative groups;
- senior managers and policy makers, clinical experts, health information managers, and system integrators;
- stakeholders associated with the development and use of upcoming eHealth initiatives relating to the HRO;
- the Department of Health; and
- consumers and consumer representatives.

1.3 Scope

This document is limited to outlining conformance points for a CIS displaying the HRO that is sent from the PCEHR to the CIS.

The conformance points apply regardless of technology or means of implementation.

This document does *not* cover:

- other views and requirements for the PCEHR;
- technical specification for rendering the View;
- conformance, compliance and accreditation (CCA) requirements;
- interoperability between the systems and those rendering the View; or
- non-traditional interfaces involving touch screens and mobile devices.

1.4 Overview

The HRO is intended to be an electronic summary of the individual's health information contained in the PCEHR system.

For healthcare providers and consumers, the HRO gives a collated summary of select documents contained in the PCEHR for a specific individual.

This presentation guide will:

- provide guidance on how the information should be formatted for display; and
- outline a method for constructing the HRO in clinical information systems.

The PCEHR will generate the View and make the information available for download and viewing by CIS users via the PCEHR business-to-business (B2B) gateway.

This guide will support clinical information system vendors, developers, and implementers who want to interact with the PCEHR by retrieving and displaying the View within their software solutions in a consistent manner.

As a guide, it includes illustrations of the design and a detailed rationale (where applicable) for the design decisions and choices. It specifies both mandatory and recommended points of guidance.

Developers may either implement the entire HRO, or specific components of the HRO in accordance with the mandatory conformance points applicable for that component. All mandatory conformance points applicable to each component are compulsory for reasons of clinical utility and will form the basis of conformance assessments of the implementation in vendor software.

The guide also includes details on the data provided in the HRO XML, including recommendations on which fields should be displayed, and how they could be used.

No branding or colour themes have been specified, and the rendering of these are left to the vendor's discretion to allow them to blend the HRO into their product's branding. NEHTA does, however, recommend that vendors select a colour palette with a colour contrast with reference to accessibility standards such as WCAG 2.0[1] and specific jurisdictional and local site recommendations for accessibility.

1.5 Points to note

1.5.1 Supporting documents

As detailed in the References section, this guide is supported by the following technical documents that describe the data, and data structure, for the View:

- *PCEHR View Service Logical Service Specification*; and
- *PCEHR View Service Technical Service Specification*.

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[1] http://www.w3.org/TR/WCAG20/.

1.5.2 Structure of the presentation guide

For each section of the View, this document will describe the following.

- Example illustrations of the conformance points including:

    - numbered references to data elements as described in the bundled data usage guide.

- Conformance points, listed with status and rationale (where applicable) such that:

    - software will be expected to meet every mandatory conformance point applicable to the components the software implements;

    - software will be expected to meet every conditional conformance point if the software vendor declares that the software satisfies the condition state given in the conformance point; and

    - software will not be required to meet recommended conformance points, but may be assessed against recommended conformance points if there is a declaration that such points have been satisfied.

- Details on the data included in the View, including:

    - name and descriptions;

    - cardinality;

    - recommendations on use; and

    - mapping of data elements to example screen display.

- The priority of the conformance points is given in their list order, displaying mandatory items first, conditional items next, and recommended items last.

Note that this guide contains conformance points that are common across multiple PCEHR views, as well as conformance points that are specific to the HRO record.

1.5.3 Illustrations

The screenshots used in this guide illustrate the conformance points; they do not form the conformance points. As such, anything not explicitly mentioned in the conformance points does not form a part of the conformance points (e.g. wording, colours, fonts, font size, exact spacing).

1.5.4 Conformance process

All implementers who want their clinical information system to comply with the scope of this guide must assess the conformance of their software to the relevant requirements via NEHTA's conformance, compliance and accreditation assessment process.

Note that section 3 is provided for guidance only, and does not contain conformance testing-related requirements.

1.5.5 Accessibility assurance

PCEHR accessibility assurance is the responsibility of implementing vendors. Vendors are to determine their own requirements for a CIS to conform to accessibility standards such as WCAG 2.0 in the development of their software

solutions. Conformance with accessibility standards is encouraged but is outside the scope of assessment.

1.6   Assumptions

This document assumes the following.

- Implementations may use resolutions that differ from the screenshots in this document. Example screenshots are not intended to act as a restriction or requirement on any software displaying the Views.

- The implementer has followed all other applicable PCEHR specifications (see References section). This guide does not offer relief from any of those requirements.

- The software environment in which the View is presented handles the authentication of the user, and the accurate selection of a consumer's PCEHR.

The implementer shall not be limited to the scope of this guide. An implementer is free to add further functionality to the View in their CIS system if that functionality does not contradict the mandatory requirements.

2 Health Record Overview Presentation Guide

This presentation guide is concerned with the display of HRO information; that is, to show how a system renders information via a View in a graphical user interface. This guide breaks these views down into components to provide an easier understanding of how these components are to be represented in the HRO.

Example screen designs in this document depict how a clinical information system could implement the conformance points described in each section.

The blue numbered references in the screenshots map to the data usage guide and is further explained in section 3.

To assist in describing some of the conformance points, examples of how the View conformance points could be implemented have been provided. These examples focus on the content and as such do not include CIS framework components (i.e. menu bar, navigation pane, header, footer, task bar, etc.). Implementers are free to add functionality not shown in the examples to their system if it does not contradict the mandatory conformance points.

2.1 View content

The following example of an HRO depicts how a clinical information system could implement the conformance points described in this section.

2.1.1   Information is available

Health Record Overview   Advance Care Planning information is available on this re**23**

This is not a complete view of the individual's health information. For more information about the individual's health record or data, please consult the individual or other healthcare professionals as needed.

24

Indigenous status: Yes, Aboriginal
Veteran and ADF status: Current or former serving ADF member who is a DVA client

Documents available on the PCEHR since the last Shared Health Summary

Show Event Summaries Only (with Clinical Synopsis if available) ☐ ⑦

6 documents available on the PCEHR since the last Shared Health Summary

1 Document Date	Document Type **2**	Author Name **3**	Author Role **4**	Organisation Name **5**
25-Oct-2013	**Personal Health Summary**	Frank Harding		National Consumer Portal
15-Sep-2013	**Specialist Letter**	Dr Yue James	Cardiologist	SA Health
▶ 07-Sep-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
25-Aug-2013	**Discharge Summary**	RN Muggeridge Catherine	Registered Nurse (Medical Practice)	VMS HOSPITALS
05-Aug-2013	**e-Referral**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-Jul-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic

10-Jul-2013 **Shared Health Summary**

Author Name **6**	Author Role	Organisation **7** ame	Address **8**	Phone **9**	Email
Dr Chris Smith	General Medical Practitioner	Bridge Clinic	123 Combe St Unley SA 5061	9555 0222	c.smith@BridgeClinic.com.au

Current & Past Medical History 21   **20**

14-Nov-2013 → 20-Dec-2013	**Leg Ulcer**
07-Feb-2013 →	**Depressive Disorder**
04-Nov-2012 →	**Non Insulin Dependent Diabetes Mellitus**
14-Apr-2012 →	**Meniere's**
10-Jan-2000 → 20-Apr-2010	**Breast Cancer (Stage II)**
	No recurrence since mastectomy
→ 8-Jan-2005	**L4/5 disc prolapse**
→ 1998	**Acute Hepatitis A**

Procedures 22

20-Dec-2013	**Debridement Left Leg Ulcer**
8-Jan-2005	**L4/5 Discectomy**
10-Jan-2000	**Right Mastectomy**

Medicines 11

10

Citalopra 12 Celica) 20mg tablet
Dose: 1 daily **13**
Reason: Depression
Indications: Depression

Metformin hydrochloride 500mg tablet
Dose: 1 tablet twice daily
Reason: NIDDM
Indications: Type 2 Diabetes Mellitus

Prochlorperazine maleate
Dose: 5mg daily
Reason: Vertigo
Indications: Prevention of nausea and vomiting, Treatment of nausea and vomiting, Vertigo and Meniere's syndrome, Adjunct in the short term management of anxiety, Schizophrenia and other psychotic disorders.

Allergies 15 Adverse Reactions   **14**

Prozac Allergy – Rash - A **16** gy
Penicillin Allergy – Nausea - Intolerance

Immunisations   8 Items   **17**

Administered
31-Oct-201 **18**	Flu vaccination (Comvax)
14-Nov-2010	23vPPV
12-Sep-2010	HPV 2 **19**
12-Sep-2010	HBV 1
12-Apr-2010	HPV 1
18-Feb-2000	dTpa
16-Apr-1980	MMR 2
14-Feb-1980	MMR 1

Personal Health Summary   **27**
Summary of personal health information such as medications, allergies and adverse reactions added by the individual or an authorised representative to the eHealth record.

Pathology Reports
Pathology reports available on the eHealth record.

Diagnostic Imaging Reports
Diagnostic Imaging reports available on the eHealth record.

Health Check Assessment Schedule
Questionnaires completed by a parent or an authorised representative at scheduled intervals to help monitor a child's growth and development available on the eHealth record.

Prescription and Dispense
Prescription and dispense records available on the eHealth record.

Medicare
Information regarding Medicare and Department of Veterans' Affairs benefits, pharmaceutical benefits, childhood immunisation and organ donor status available on the eHealth record.

Advance Care Directive Custodian
Advance Care Directive Custodian contact details available on the eHealth record.

Documents available on the PCEHR in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available) ☐ ⑦

Group by   Not grouped ▾

Document Date	Document Type	Author Name	Author Role	Organisation Name
25-Oct-2013	**Personal Health Summary**	Frank Harding		National Consumer Portal
15-Sep-2013	**Specialist Letter**	Dr Yue James	Cardiologist	SA Health
▶ 07-Sep-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
25-Aug-2013	**Discharge Summary**	RN Muggeridge Catherine	Registered Nurse (Medical Practice)	VMS HOSPITALS
05-Aug-2013	**e-Referral**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-July-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
10-Jul-2013	**Shared Health Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
10-Jun-2013	**Personal Health Summary**	Frank Harding		National Consumer Portal
10-Jun-2013	**Personal Health Summary**	Frank Harding		National Consumer Portal
09-Jun-2013	**Discharge Summary**	Dr Environment Good	Intensive Care Specialist	Forties Hospital
▶ 25-May-2013	**Event Summary**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
▶ 13-May-2013	**Event Summary**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
06-Feb-2013	**Specialist Letter**	Dr Yvonne Browne	Cardiologist	Hogwarts Medical
05-Jan-2013	**e-Referral**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
28-Dec-2012	**Event Summary ****	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic

** Event Summary with no Clinical Synopsis Description

Figure 1: Information is available example

ID	Conformance Points	Status
View-CM08	The Rendering System **SHALL NOT** allow horizontal scrolling of the View.	Mandatory
View-CM35	Text that does not fit horizontally within the available space **SHALL** be wrapped onto a new line.	Mandatory
	If the available space is adjustable (e.g. resizable columns) or the entire block of text can be presented by another means (e.g. a tooltip or popup box), then the View **SHALL** instead indicate that some text is hidden (where applicable) via an ellipsis or other means.	
	Rationale	
	"Available space" may mean a column, a line, the width of a page, an annotation, or other designated space designed to hold text. Space that is too narrow to hold the necessary text must support the wrapping of that text in a predictable way so that information is not lost or hidden from the reader.	
View-HRO85	The View **SHALL** be displayed in such a way as to allow the entire dataset for a specific component to be viewed (e.g. provide vertical scrolling / paging).	Mandatory
View-CM15	DateTime values displayed in a column **SHOULD** be right aligned in the View.	Recommended
View-CM11a	Structured DateTime values in the View **SHOULD** be in the format [DD-Mmm-YYYY] e.g. 14-Aug-2013.	Recommended
	Rationale	
	This requirement aligns to CDA® Rendering specification requirement CDA-RS-16.	
View-HRO01	A title **SHOULD** be displayed reflecting the contents of the component or components being displayed.	Recommended

2.1.1.1   Advance Care Directive Custodian Record is available

If the Advance Care Directive Custodian Record is available, the information below is displayed:

Advance Care Directive Custodian details are available

Figure 2: Advance Care Directive Custodian Record is available example

If this information is displayed, these conformance points apply:

ID	Conformance Points	Status
View-HRO12	The View **SHALL** display an indication that Advance Care Directive Custodian details are available.	Mandatory
View-HRO251	The indicator that an Advance Care Directive Custodian Record is available **SHOULD** be in the form of a link to the Advance Care Directive Custodian Record document with a title "Advance Care Directive Custodian details are available".	Recommended

2.1.1.2   New Documents are available

The New Documents section <newDocuments> of the HRO XML stream contains a listing of documents which have been uploaded to the PCEHR for the current patient since the last Shared Health Summary was uploaded to the PCEHR. It will list Shared Health Summaries, Event Summaries, Discharge Summaries, e-Referral, Specialist Letters and Personal Health Summaries.

This section will have no information available in the following cases:

1. The patient does not have a Shared Health Summary in their PCEHR Record.

2. The patient has not had any documents of the above type uploaded to the PCEHR since the last Shared Health Summary.

A CIS is permitted to render this component on its own, in conjunction with other components of the HRO, or not at all. If this component is rendered, it must be rendered in its entirety according to this section.

Figure 3: New Documents are available example

ID	Conformance Points	Status
View-CM17	Each Document Line in the View **SHALL** act as a link to the source CDA® document in the PCEHR.	Mandatory
View-HRO500	The New Documents component **SHALL** display the title "Documents available on the PCEHR	Mandatory

ID	Conformance Points	Status
	since the last Shared Health Summary".	
	Rationale	
	To make it immediately obvious to the user that there are newer documents than the latest Shared Health Summary available in the PCEHR.	
View-HRO05	The New Documents component **SHALL** display at least the following column labels: • Document Date; • Document Type; and • Organisation Name.	Mandatory
View-HRO640	Information displayed to the user **SHOULD** be capable of being ordered by any available column.	Recommended

2.1.1.3   Shared Health Summary is available

The Shared Health Summary <sharedHealthSummary> of the HRO XML stream contains details of the last Shared Health Summary placed on the individual's PCEHR. It may be displayed to the user either in combination with other sections of the HRO stream, or individually as an informational page.

The section will return no information in the case where the individual has no Shared Health Summary on their PCEHR.

This section is only applicable if the View contains a Shared Health Summary Component.

A CIS is permitted to render this component on its own, in conjunction with other components of the HRO or not at all. If this component is rendered, it must be rendered in its entirety according to this section.

10-Jul-2013 Shared Health Summary

Author Name ⑥ Author Role ⑦ Organisation Name ⑧ Address Phone ⑨ Email

Dr Chris Smith General Medical Practitioner Bridge Clinic 123 Combe St Unley SA 5061 9555 0222 c.smith@BridgeClinic.com.au

Current & Past Medical History ㉑ ⑳

14-Nov-2013 → 20-Dec-2013	**Leg Ulcer**
07-Feb-2013 →	**Depressive Disorder**
04-Nov-2012 →	**Non Insulin Dependent Diabetes Mellitus**
14-Apr-2012 →	**Meniere's**
10-Jan-2000 → 20-Apr-2010	**Breast Cancer (Stage II)**
	No recurrence since mastectomy
→ 8-Jan-2005	**L4/5 disc prolapse**
→ 1998	**Acute Hepatitis A**

Procedures ㉒

20-Dec-2013	**Debridement Left Leg Ulcer**
8-Jan-2005	**L4/5 Discectomy**
10-Jan-2000	**Right Mastectomy**

Medicines ⑪ ⑩

Citalopram (Celica) 20mg tablet ⑫ ⑬
Dose: 1 daily
Reason: Depression
Indications: Depression

Metformin hydrochloride 500mg tablet
Dose: 1 tablet twice daily
Reason: NIDDM
Indications: Type 2 Diabetes Mellitus

Prochlorperazine maleate
Dose: 5mg daily
Reason: Vertigo
Indications: Prevention of nausea and vomiting, Treatment of nausea and vomiting, Vertigo and Meniere's syndrome, Adjunct in the short term management of anxiety, Schizophrenia and other psychotic disorders.

Allergies & Adverse Reactions ⑮ ⑯ ⑭

Prozac Allergy – Rash - Allergy
Penicillin Allergy – Nausea - Intolerance

▼ **Immunisations** 8 Items ⑰

Administered		
31-Oct-20 ⑱	Flu vaccination (Comvax)	
14-Nov-2010	23vPPV	
12-Sep-2010	HPV ⑲	
12-Sep-2010	HBV 1	
12-Apr-2010	HPV 1	
18-Feb-2000	dTpa	
16-Apr-1980	MMR 2	
14-Feb-1980	MMR 1	

Figure 4: Shared Health Summary is available example

ID	Conformance Points	Status
View-HRO19	The View **SHALL** display a component title "Shared Health Summary" at the top of the Shared Health Summary component.	Mandatory
View-HRO21	The Shared Health Summary component **SHALL** display the Shared Health Summary Date near the Shared Health Summary component title.	Mandatory
View-HRO25	The Shared Health Summary component **SHALL** contain four sub-components in any order: • Current and Past Medical History; • Medicines; • Allergies and Adverse Reactions; and	Mandatory

ID	Conformance Points	Status
	• Immunisations.	
View-HRO23	The Shared Health Summary component **SHOULD** display details of the Shared Health Summary Author under, beside, or in proximity to the following headings: • Author Name; • Author Role; • Organisation Name; • Address; • Phone; and • Email. The address, phone and email details **SHALL** relate to the organisation or the business details of the author and **SHALL NOT** contain personal or private details of the author.	Recommended

Current and Past Medical History

ID	Conformance Points	Status
View-HRO26	The View **SHALL** display a component title "Current and Past Medical History".	Mandatory
View-HRO27	The Current and Past Medical History component **SHALL** display problem/diagnosis items or the appropriate exclusion statement followed by procedure items or the appropriate exclusion statement from the Shared Health Summary component of the View, followed by uncategorised medical history items (if applicable).	Mandatory
View-HRO28	The Current and Past Medical History **SHALL** display the following information per problem/diagnosis item: • Onset Date; • Resolved Date; • Description; and • Comment (if recorded).	Mandatory
View-HRO351	Diagnosis/health problem items **SHOULD** be clearly separated from Procedure items and uncategorised medical history items within the	Recommended

ID	Conformance Points	Status
	Current and Past Medical History component.	

Medicines

ID	Conformance Points	Status
View-HRO32	The View **SHALL** display a component title "Medicines".	Mandatory
View-HRO33	The Medicines component **SHALL** display all the medicine items or the appropriate exclusion statements from the Shared Health Summary component of the View.	Mandatory
View-HRO34	The Medicines component **SHALL** display, per medicine item, at least the following information: • the medicine name (<medicineTitle>); and • the dose instructions.	Mandatory

Allergies and Adverse Reactions

ID	Conformance Points	Status
View-HRO38	The View **SHALL** display a component title "Allergies and Adverse Reactions".	Mandatory
View-HRO39	The Allergies and Adverse Reactions component **SHALL** display all the allergies and adverse reactions items or the appropriate exclusion statements from the Shared Health Summary component of the View.	Mandatory
View-HRO40	The Allergies and Adverse Reactions component **SHALL** display, per allergies and adverse reaction item, the following information in the following order: • Substance/Agent (<advReactionCause>); • Reactions for that Substance/Agent (<advReactionManifestation>); and • Reaction type (<advReactionType>).	Mandatory
View-HRO45	The Allergies & Adverse Reactions items **SHALL** be sorted in the order they are recorded in the XML stream.	Mandatory
View-HRO41	All reactions recorded for a substance/agent **SHALL** be displayed.	Mandatory

Immunisations

ID	Conformance Points	Status
View-HRO46	The View **SHALL** display a component title "Immunisations".	Mandatory
View-HRO47	The Immunisation component **SHALL** display all the immunisation items or the appropriate exclusion statements from the Shared Health Summary component of the View.	Mandatory
View-HRO48	The Immunisation component **SHALL** display, per Immunisation item, the following information in the following order: • Date administered • Vaccine name (as recorded on the Shared Health Summary); and • Vaccine sequence number (if recorded)	Mandatory

Entitlements and qualifications

ID	Conformance Points	Status
View-HRO110	The View **SHALL NOT** display any entitlements or qualifications for any healthcare professional or subject of care. *Rationale* Shared Health Summaries may carry entitlement and qualification information for the subject of care and/or healthcare professionals. The Health Record Overview must not display this information as it is considered irrelevant in a Health Record Overview context.	Mandatory

2.1.1.4 Recent Documents are available

The Recent Documents section <recentDocuments> of the HRO XML stream contains a listing of documents that have been uploaded to the PCEHR for the current patient within the last twelve (12) months. It will list Shared Health Summaries, Event Summaries, Discharge Summaries, e-Referral, Specialist Letters and Personal Health Summaries.

This section will have no information available if the patient has not had any documents uploaded to the PCEHR.

A CIS is permitted to render this component on its own, in conjunction with other components of the HRO or not at all. If this component is rendered, it must be rendered in its entirety according to this section.

Figure 5: Recent Documents are available example

ID	Conformance Points	Status
View-CM17	Each Document Line in the View **SHALL** act as a link to the source CDA® document in the PCEHR.	Mandatory
View-HRO78	The View **SHALL** display the component title "Documents available on the PCEHR in the last 12 months".	Mandatory
View-HRO80	The Recent Documents component **SHALL** display the following column labels: • Date; • Document Type; • Author Name; • Author Role; and • Organisation Name.	Mandatory

2.1.1.5 Other Links

The Other Links section <otherLinks> of the HRO XML stream, provides links to views and other records available in the current patient's PCEHR. Providing these

links to the clinician enables rapid evaluation of various, clinically important information and a holistic view of the patient history.

A CIS is permitted to render this component on its own, in conjunction with other components of the HRO, or not at all. If this component is rendered, it must be rendered in its entirety according to this section.

A CIS should only render links to views that are supported by the CIS.

Figure 6: Links to Views are available example

ID	Conformance Points	Status
View-HRO420	Hyperlinks displayed in the Other Links section **SHALL** use the data element </healthRecordOverviewResponse/otherLinks/link/linkTitle> to label the link. NOTE: The recommended description that is displayed below each link is specified in subsections below. *Rationale* The View XML will provide the correct title to use for each link. The positioning for each link should remain in the same order regardless of the title provided. Using the text provided in the XML enables universal and consistent naming and centralised management of titles.	Mandatory
View-HRO10	If the CIS renders a link for a View that contains no information then the CIS **SHALL** indicate that the View contains no information. *Rationale* The user should be informed that a View contains no information prior to activating the link.	Mandatory

Personal Health Summary

ID	Conformance Points	Status
View-HRO58	Under the Personal Health Summary link title, the View **SHOULD** display a link description: "Summary of personal health information such as medications, allergies and adverse reactions added by the individual or an authorised representative to the eHealth record."	Recommended

Pathology Reports

ID	Conformance Points	Status
View-HRO64	Under the Pathology Report View link title, the View **SHOULD** display a link description: "Pathology reports available on the eHealth record."	Recommended

Diagnostic Imaging Reports

ID	Conformance Points	Status
View-HRO70	Under the Diagnostic Imaging Report View link title, the View **SHOULD** display a link description: "Diagnostic Imaging reports available on the eHealth record."	Recommended

Health Check Assessment Schedule

ID	Conformance Points	Status
View-HRO76	Under the Health Check Assessment Schedule link title, the View **SHOULD** display a link description: "Questionnaires completed by a parent or an authorised representative at scheduled intervals to help monitor a child's growth and development available on the eHealth record."	Recommended

Prescription and Dispense

ID	Conformance Points	Status
View-HRO67	Under the Prescription and Dispense link title, the View **SHOULD** display a link description:	Recommended

ID	Conformance Points	Status
	"Prescription and Dispense records available on the eHealth record."	

Medicare

ID	Conformance Points	Status
View-HRO61	Under the Medicare title, the View **SHOULD** display a link description: "Information regarding Medicare and Department of Veterans' Affairs benefits, pharmaceutical benefits, childhood immunisation, and organ donor status available on the eHealth record."	Recommended

Advance Care Directive Custodian Record

ID	Conformance Points	Status
View-HRO73	Under the Advance Care Directive Custodian Record link title, the View **SHOULD** display a link description: "Advance Care Directive Custodian contact details available on the eHealth record."	Recommended

2.1.2   No information is available

Within the HRO XML stream, each section is provided with a flag element (<informationAvailable>) indicating that information is or is not available within that section as follows:

<informationAvailable> = 'true': Information **IS** available

<informationAvailable> = 'false': Information **IS NOT** available

A CIS is not required to display an exclusion statement for components that are not rendered.

Documents available on the PCEHR since the last Shared Health Summary

> ℹ There are no Documents available on the PCEHR since the last Shared Health Summary available on the PCEHR since the Shared Health Summary.

Shared Health Summary

> ℹ No Shared Health Summary available.

Documents available on the PCEHR in the last 12 months

> ℹ There are no Documents available on the PCEHR since the last Shared Health Summary available on the PCEHR in the last 12 months.

New Documents, Shared Health Summary and Recent Documents components when no information is available within the component.

Current & Past Medical History

No health problems or diagnoses information available

Procedures

No Clinical procedures information available

Other

No other Clinical History information available

Medicines

No medicine information available

Allergies & Adverse Reactions

No Allergies and Adverse Reaction information available

▼ Immunisations 0 Items

No Immunisation information available

Shared Health Summary component when information is available but one or more sub-components within the Shared Health Summary have no information for them (e.g. no information is available for Allergies and Adverse Reactions).

Figure 7: No information is available example

ID	Conformance Points	Status
View-HRO06	A Problem/Diagnosis Component which returns no documents (<informationAvailable value="false" flavor="problem" />) **SHALL** display the appropriate exclusion statement: "No known problem diagnoses information available" or "No supplied problem diagnoses available" depending on the <code> or <displayName> value	Mandatory
View-HRO09	A Procedure Component which returns no information (<informationAvailable value="false" flavor="procedure" />) **SHALL** display the appropriate exclusion statement: "No known procedure information available"	Mandatory

ID	Conformance Points	Status
	or	
	"No supplied procedure information available"	
	depending on the <code> or <displayName> value	
View-HRO108	A New Documents component that has no documents listed **SHALL** display the exclusion statement "There are no documents available on the PCEHR since the last Shared Health Summary".	Mandatory
View-HRO109	A Recent Documents component that has no documents listed **SHALL** display the exclusion statement "There are no documents available on the PCEHR in the last 12 months".	Mandatory
View-HRO11	A Medicines Component which returns no information (<informationAvailable value="false" />) **SHALL** display the appropriate exclusion statement:	Mandatory
	"No known medication information available"	
	or	
	"No supplied medication information available"	
	depending on the <code> or <displayName> value.	
View-HRO17	An Allergies and Adverse Reactions Component which returns no information (<informationAvailable value="false" />) **SHALL** display the appropriate exclusion statement:	Mandatory
	"No known allergies or adverse reaction information available"	
	or	
	"No supplied allergies or adverse reaction information available"	
	depending on the <code> or <displayName> value.	
View-HRO24	An Immunisations Component which returns no information (<informationAvailable value="false" />) **SHALL** display the appropriate exclusion statement:	Mandatory
	"No known immunisation information available"	
	or	
	"No supplied immunisation information	

ID	Conformance Points	Status
	available"	
	depending on the <code> or <displayName> value.	

2.2 Additional display features

The following examples of the View provide suggestions for the display of information using various groupings, and the options for collapsing and expanding available information within components returning document lists (i.e. New Documents and Recent Documents).

This section applies to the New Documents and Recent Documents components if they are rendered by the CIS.

2.2.1 Filtering

Where Event Summary information is displayed, filtering by Event Summary must be provided. The following wireframe provides a simple check-box method of filtering by Event Summary. As such, it conforms to View-HRO201, View-HRO202, and View-HRO203.

Filter Applied

Documents available on the PCEHR since the last Shared Health Summary

Show Event Summaries Only (with Clinical Synopsis if available) ☑ ⑦

2 Event Summaries available on the PCEHR since the Shared Health Summary

Date	Document Type	Author Name	Author Role	Organisation Name
▶ 07-Sep-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-Jul-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic

Documents available on the PCEHR in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available) ☑ ⑦

Group by [Not grouped ▾]

Date	Document Type	Author Name	Author Role	Organisation Name
▶ 07-Sep-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-July-2013	**Event Summary**	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 25-May-2013	**Event Summary**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
▶ 13-May-2013	**Event Summary**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
▶ 28-Dec-2012	**Event Summary**	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic

No Filter Applied

Documents available on the PCEHR since the last Shared Health Summary

Show Event Summaries Only (with Clinical Synopsis if available) ☐ ⑦

6 documents available on the PCEHR since the last Shared Health Summary

Date ①	Document Type ②	Author Name ③	Author Role ④	Organisation Name ⑤
25-Oct-2013	Personal Health Summary	Frank Harding		National Consumer Portal
15-Sep-2013	Specialist Letter	Dr Yue James	Cardiologist	SA Health
▶ 07-Sep-2013	Event Summary	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
25-Aug-2013	Discharge Summary	RN Muggeridge Catherine	Registered Nurse (Medical Practice)	VMS HOSPITALS
05-Aug-2013	e-Referral	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-Jul-2013	Event Summary	Dr Chris Smith	General Medical Practitioner	Bridge Clinic

Documents available on the PCEHR in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available) ☐ ⑦

Group by [Not grouped ▼]

Date	Document Type	Author Name	Author Role	Organisation Name
25-Oct-2013	Personal Health Summary	Frank Harding		National Consumer Portal
15-Sep-2013	Specialist Letter	Dr Yue James	Cardiologist	SA Health
▶ 07-Sep-2013	Event Summary	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
25-Aug-2013	Discharge Summary	RN Muggeridge Catherine	Registered Nurse (Medical Practice)	VMS HOSPITALS
05-Aug-2013	e-Referral	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
▶ 22-July-2013	Event Summary	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
10-Jul-2013	Shared Health Summary	Dr Chris Smith	General Medical Practitioner	Bridge Clinic
10-Jun-2013	Personal Health Summary	Frank Harding		National Consumer Portal
10-Jun-2013	Personal Health Summary	Frank Harding		National Consumer Portal
09-Jun-2013	Discharge Summary	Dr Environment Good	Intensive Care Specialist	Forties Hospital
▶ 25-May-2013	Event Summary	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
▶ 13-May-2013	Event Summary	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
06-Feb-2013	Specialist Letter	Dr Yvonne Browne	Cardiologist	Hogwarts Medical
05-Jan-2013	e-Referral	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
28-Dec-2012	Event Summary **	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic

Figure 8: Filtering example

ID	Conformance Points	Status
View-HRO201	Document Sections in the Health Record Overview View (New Documents and Recent Documents) **SHALL** allow filtering.	Mandatory
View-HRO202	Document sections (New Documents and Recent Documents) within the Health Record Overview View **SHALL** allow filtering by Event Summary.	Mandatory
View-HRO203	Filtered Document Sections (New Documents and Recent Documents) within the Health Record Overview View **SHALL** indicate to the user that a filter is applied.	Mandatory

2.2.2 Group By

The Group By function provides the user with options to aggregate content according to specific fields of documents available in the Recent Documents component of the View.

2.2.2.1 Group By menu

ID	Conformance Points	Status
View-HRO200	The following Group By menu **SHOULD** be displayed: • Document Type; • Organisation Name; and • Not grouped (Default).	Recommended

2.2.2.2 Document Type

Where multiple document types are displayed, grouping by Document Type displays a list of CDA® documents returned from the PCEHR and is based on the Document Type.

Figure 9: Document Type example

ID	Conformance Points	Status
View-HRO86	The Group By menu **SHOULD** display "Document Type" to signify Group By Type has been applied.	Recommended
View-	The View **SHOULD** display the label "Document	Recommended

ID	Conformance Points	Status
HRO87	Type".	
View-HRO88	Under the label Document Type, the View **SHOULD** display the Document Type summary line.	Recommended

2.2.2.3   Organisation Name

Where multiple Organisation Names are displayed, grouping by Organisation Name displays a list of CDA® documents returned from the PCEHR and is based on the authoring organisation.

Figure 10: Organisation Name example

ID	Conformance Points	Status
View-HRO89	The Group By menu **SHOULD** display "Organisation Name" to signify Group By Type has been applied.	Recommended
View-HRO90	The View **SHOULD** display the label "Organisation Name".	Recommended
View-HRO91	Under the label Organisation Name, the View **SHOULD** display the Organisation Name summary line.	Recommended

2.2.2.4   Not grouped

The grouping by Not grouped is the default grouping of the Recent Documents component of the View. It displays a list of CDA® documents returned from the

PCEHR and is based on the Event Date/Time or Effective Date/Time for each document, whichever is available in the PCEHR.

Figure 11: Not grouped example

ID	Conformance Points	Status
View-HRO94	The Group By menu **SHOULD** display "Not grouped" to signify 'Group By type' has not been applied. (Please refer to HRO80 for guidance on displaying data with column headings.)	Recommended

2.2.3   View items

When opening a complete HRO, the HRO displays document items in a collapsed summary format. Users shall be able to select a summary line to display details of the clinical documents for each summary line. This section outlines the collapsed and expanded components of the HRO.

2.2.3.1 Collapsed Views

Figure 12: Collapsed Views example

ID	Conformance Points	Status
View-CM25	Each Summary Line **SHOULD** have a 'roll-over' state, activated by the movement of the mouse cursor over any part of the Item, with a font colour that provides colour differentiation according to accessibility standards.	Recommended
View-CM29	The Summary Line in the View **SHOULD** be displayed as collapsed rows by default.	Recommended

2.2.3.2   Expanded Group By Menu

Documents available on the PCEHR in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available) ☐ ⑦

Available on the PCEHR in the last 12 months

Group by [Document Type ▾]

Document Type

Personal Health Summary

  10-Jun-2013 **Personal Health Summary** – Frank Harding – National Consumer Portal

Discharge Summary

e-Referral

Event Summary

  ▼ 07-Sep-2013 **Event Summary** – Dr Chris Smith – General Medical Practitioner – Bridge Clinic

    Patient presented for antenatal check-up, G1/P0, thinks she is 16 weeks pregnant. Slight nausea experienced in mornings, but otherwise feels well in... [More Details]

  ▼ 22-Jul-2013 **Event Summary** – Dr Chris Smith – General Medical Practitioner – Bridge Clinic

    Patient presented today for additional medications for upper respiratory infection.

  ▼ 25-May-2013 **Event Summary** – Dr Environment Good – Intensive Care Specialist – Oz Health Clinic

    Patient presented today after a fall in the local shopping centre. Suffered a deep laceration to her right calf which required cleaning and minor...[More Details]

  ▼ 13-May-2013 **Event Summary** – Dr Environment Good – Intensive Care Specialist – Oz Health Clinic

    Patient presented today for additional prescribed information for chest infection as not responding to previous medication.

  28-Dec-2012 **Event Summary** – Dr Environment Good – Intensive Care Specialist – Oz Health Clinic **

Pathology Result Report

  25-Oct-2013 **Personal Health Summary** – Frank Harding – National Consumer Portal

  10-Jun-2013 **Personal Health Summary** – Frank Harding – National Consumer Portal

Shared Health Summary

  10-Jul-2013 **Shared Health Summary** – Dr Chris Smith – General Medical Practitioner – Bridge Clinic

Specialist Letter

  15-Sep-2013 **Specialist Letter** – Dr Yue James – Cardiologist – SA Health

  06-Feb-2013 **Specialist Letter** – Dr Yvonne Browne – Cardiologist – Hogwarts Medical

** *Event Summary with no Clinical Synopsis Description*

Figure 13: Expanded Views example

ID	Conformance Points	Status
View-CM33	The View **SHALL** display Summary and Document lines in a way that visually separates them (e.g. with alternate shading or a line).	Mandatory
View-CM31	Expanded Summary Line displayed in the View **SHOULD** be collapsible.	Recommended
View-CM26	Each Document Line **SHOULD** have a 'roll-over' state, activated by the movement of the mouse cursor over any part of the Item, with a font colour that provides colour differentiation according to accessibility standards.	Recommended
View-HRO107	Collapsed Organisation Name Summary Line displayed in the View **SHOULD** be expandable.	Recommended
View-HRO92	The expanded Document Line **SHOULD** display the following data items: • Date; • Document Type; • Author Name;	Recommended

ID	Conformance Points	Status
	• Author Role; and	
	• Organisation Name.	
View-HRO95	When the Group By menu is selected, the expanded Document Lines **SHOULD NOT** display the following default labels: • Date; • Document Type; • Author Name; • Author Role; or • Organisation Name.	Recommended

2.2.3.3 Clinical Synopsis

Figure 14: Clinical Synopsis example

ID	Conformance Points	Status
View-HRO302	Document Lines that contain a Clinical Synopsis **SHALL** provide a clear indicator that a Clinical Synopsis is available.	Mandatory
View-HRO07	A Document Line containing a Clinical Synopsis Description **SHOULD** display a control to open and close the Clinical Synopsis Description.	Recommended
View-HRO96	The Clinical Synopsis Description **SHOULD** be limited to 150 characters, followed by an ellipsis (...) and a clickable "More Details" text. Example: ... [More Details]	Recommended
View-HRO97	Activating the "More Details" text **SHOULD** render the entire CDA® Document in accordance with CDA® Rendering Guide.	Recommended

3 Data usage

The accompanying spreadsheet (i.e. data usage guide) provides guidance and recommendations on how the View XML can be used for screen display, but does not contain testable requirements for conformance, or for compliance and accreditation purposes, or other similar processes.

The spreadsheet is derived from the PCEHR View XML and includes:

- data element name;
- numbered references to sample screen layouts in section 2;
- data element description;
- cardinality; and
- recommendations for use.

The screenshots in this document include numbered references that map to column A in the spreadsheet. A developer wishing to locate a particular data item in the XML stream can use the numbered references to map data items in the screenshots to the data usage guide spreadsheet.

Not every element in the XML stream has been represented on the screenshots.

The screenshots and numbered references are not exhaustive but are a guide to developers.

Acronyms

Acronym	Description
CCA	conformance, compliance and accreditation
CDA®	Clinical Document Architecture
CIS	clinical information system
HRO	health record overview
IHI	individual healthcare identifier
NIO	national infrastructure operator
PCEHR	personally controlled electronic health record
UTC	Coordinated Universal Time
WCAG	*Web Content Accessibility Guidelines*

Glossary

Term	Meaning
Clinical Document Architecture	An XML-based mark-up standard intended to specify the encoding, structure, and semantics of clinical documents for exchange. CDA® is an ANSI-certified standard from Health Level Seven (HL7®).
clinical synopsis	The text of an Event Summary which is limited to a pre-determined number of characters. Character restriction is set to 500 by default.
Component	Grouping of related information.
control	A user interface pattern or handle to hide each element and reveal it.
dataset	The complete information available for a given View.
document line	A row within the View representing a single document is called a document line. Typically, the row or line can be clicked and the document that line is representing can be opened and viewed.
implementer	A person or organisation that is putting a technical solution in place. Typically an organisation with software developers or a software vendor.
IS	The terms **IS** may appear in a requirement to indicate a true state of affairs. Its negative form **IS NOT** indicates a false state of affairs.
individual healthcare identifier	A unique 16-digit number that identifies individuals within Australia who receive healthcare, for example Australian citizens, permanent residents or visitors to Australia.
Present in View Payload	This indicates if the attribute will be provided by the PCEHR in any View requested by a CIS. This does not indicate it will be available in the CIS user interface, report, or clinical document – only that it is provided in the View payload.
roll-over	The act of moving a mouse pointer over an area, button or other screen control. A term used in a graphical user interface context.
SHALL	The term **SHALL** in a requirement indicates a mandatory requirement. Its negative form **SHALL NOT** indicates a prohibition.
SHOULD	The term **SHOULD** in a requirement indicates a recommendation. Its negative form **SHOULD NOT** indicates an option that is not recommended.
summary line	A row of text that is a short description of information that could be expanded and viewed directly below.
View	Display of related information in a structured way.

References

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