



Health Record Overview Presentation Guide

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1 Introduction

Purpose

This document is a presentation guide v1.2 is for the My Health Record (MHR) Health Record Overview (HRO) v1.1, 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, MHR 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 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 View custom XML.

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.

Scope

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

Overview

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

For healthcare providers and consumers, the HRO gives a collated summary of select documents contained in the MHR 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 MHR will generate the View and make the information available for download and viewing by CIS users via the MHR business-to-business (B2B) gateway.

This guide will support clinical information system vendors, developers, and implementers who want to interact with the MHR 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. The Agency recommends that vendors select a colour palette with a colour contrast with reference to accessibility standards such as WCAG 2.0¹ and specific jurisdictional and local site recommendations for accessibility.

Points to note

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:

- *My Health Record View Service Logical Service Specification [LSS]*
- *My Health Record View Service Technical Service Specification [TSS].*

¹ <http://www.w3.org/TR/WCAG20/>.

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 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 MHR views, as well as conformance points that are specific to the HRO.

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).

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 the Agency's conformance, compliance and declaration assessment process.

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

Accessibility assurance

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.

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 View.
- The implementer has followed all other applicable MHR 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 MHR.

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.

View content

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

Information is available

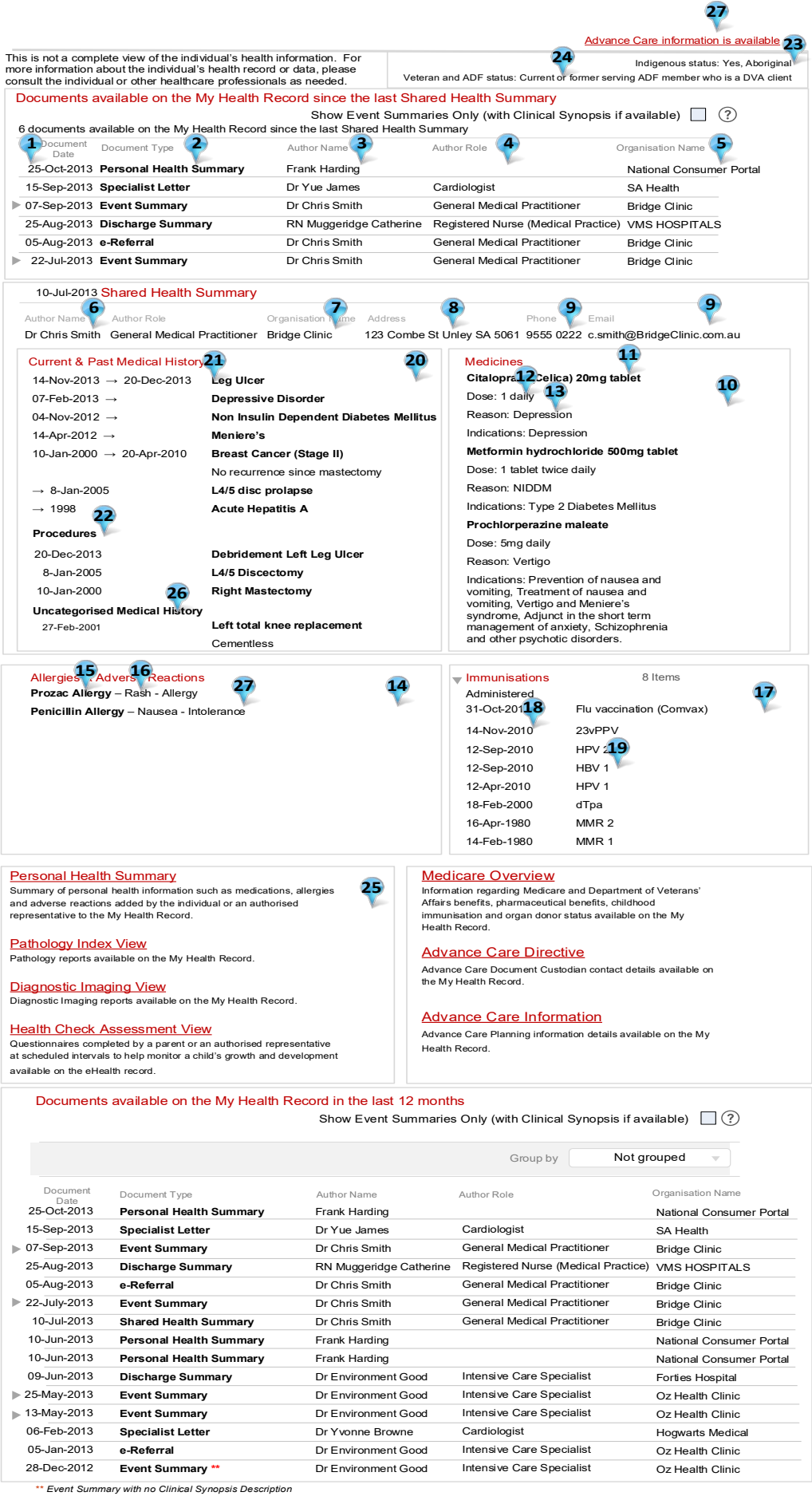


Figure 1: Information is available diagram

ID	Conformance Points	Status
View-CM08	The rendering system SHALL NOT allow horizontal scrolling of the View.	Mandatory
View-CM35	<p>Text that does not fit horizontally within the available space SHALL be wrapped onto a new line.</p> <p>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.</p> <p><i>Rationale</i></p> <p>“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.</p>	Mandatory
View-HRO85	The View SHALL be displayed in such a way as to allow the entire data set 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	<p>Structured DateTime values in the View SHOULD be in the format [DD-Mmm-YYYY] e.g. 14-Aug-2013.</p> <p><i>Rationale</i></p> <p>This requirement aligns to CDA Rendering specification requirement CDA-RS-16.</p>	Recommended
View-HRO01	A title SHOULD be displayed reflecting the contents of the component or components being displayed.	Recommended

Advance Care Information Indicator

The visual Advance Care Information Indicator as seen in [section 2.1.1](#) (data point 27) utilises the same HRO payload data item as the ‘Advance Care Information’ Other Link indicator, as discussed in [section 2.1.1.5](#).

It is mandatory that systems which implement the HRO also implement this indicator. The visual indicator must be rendered as per [section 2.1.1](#) (data point 27). It is optional to also include the same link in the Other Link component as described in [section 2.1.1.5](#).

In either case, if the visual indicator is implemented then its corresponding view must also be implemented and clicking the visual indicator must take the user to that view.

The “advance care information available” condition is true when at least one of the following documents is in the consumer’s My Health Record:

- Advance Care Planning document
- Goals of Care document
- Advance Care Document Custodian Record

If “advance care information available” is true, the below visual indicator must be displayed as per [section 2.1.1](#) (data point 27):

Advance Care information is available

Figure 2: Advance Care Information is available diagram

If “advance care information available” is false, the visual indicator as per [section 2.1.1](#) (data point 27) is not to be displayed:

ID	Conformance Points	Status
View-HRO330	<p>The View SHALL display an indicator when Advance Care Information is available.</p> <p>This is the case when at least one of the following documents is available in the consumer's my Health Record:</p> <ul style="list-style-type: none">• Advance Care Planning document• Goals of Care document• Advance Care Directive Custodian Record	Mandatory

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 My Health Record system for the current patient since the last Shared Health Summary was uploaded to the My Health Record.

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

1. The patient does not have a Shared Health Summary in their My Health Record.
2. The patient has not had any documents uploaded to the My Health Record 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 diagram

ID	Conformance Points	Status
View-CM17	Each document line in the View SHALL act as a link to the source CDA document in the My Health Record system such that the CDA document is presented before, or at the same time, as any PDF attached to the CDA document.	Mandatory
View-HRO500	<p>The New Documents component SHALL display the title “Documents available on the My Health Record system since the last Shared Health Summary”.</p> <p><i>Rationale</i></p> <p>To make it immediately obvious to the user that there are newer documents than the latest Shared Health Summary available in the My Health Record system.</p>	Mandatory
View-HRO05	<p>The New Documents component SHALL display at least the following column labels:</p> <ul style="list-style-type: none"> 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

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 My Health Record. 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 My Health Record.

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.

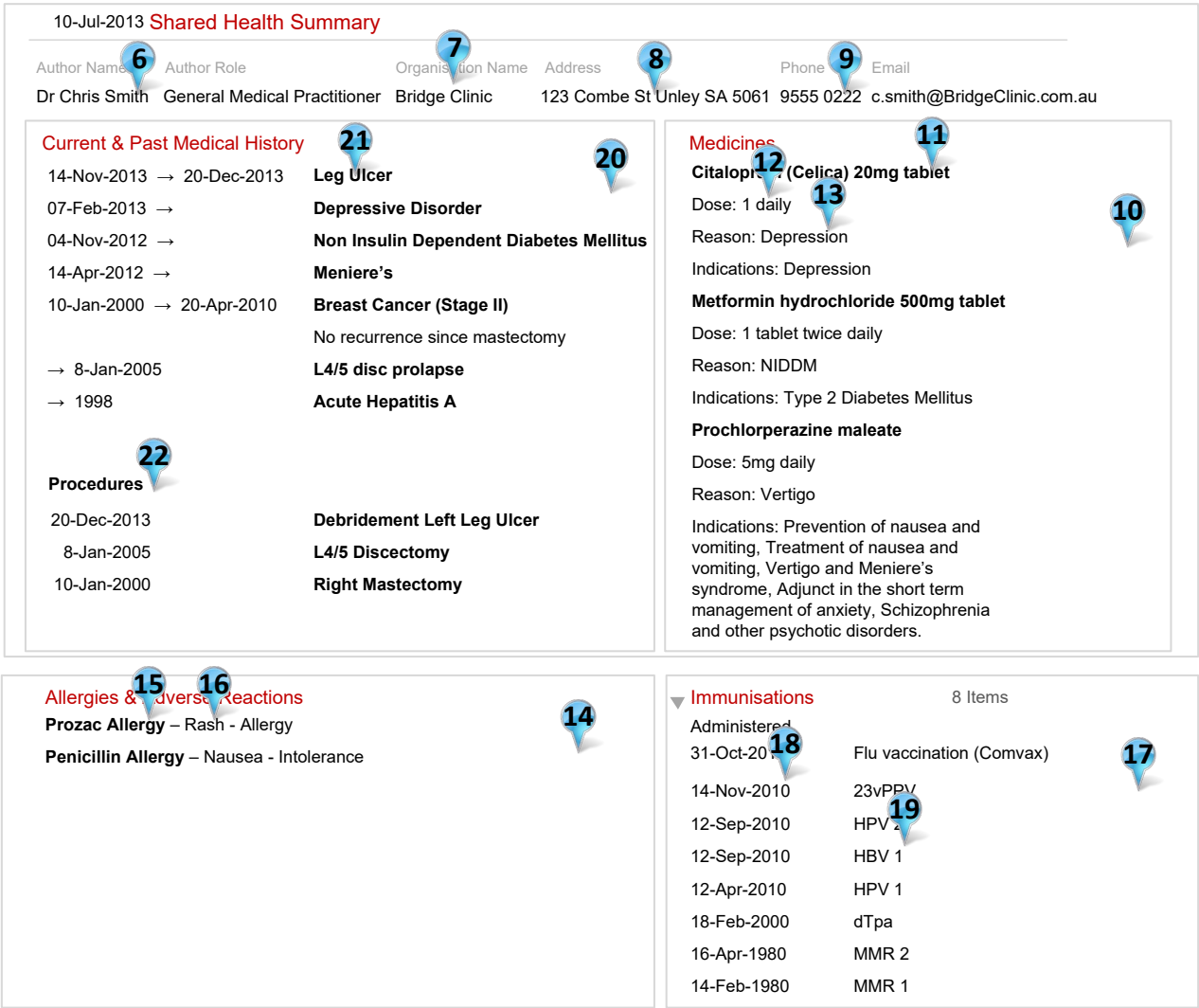


Figure 4: Shared Health Summary is available diagram

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: <ul style="list-style-type: none">Current and Past Medical History;Medicines;Allergies and Adverse Reactions; andImmunisations.	Mandatory
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: <ul style="list-style-type: none">Author Name;	Recommended

ID	Conformance Points	Status
	<ul style="list-style-type: none"> • Author Role; • Organisation Name; • Address; • Phone; and • Email. <p>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.</p>	

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	<p>The Current and Past Medical History SHALL display the following information per problem/diagnosis item:</p> <ul style="list-style-type: none"> • 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 Current and Past Medical History component.	Recommended

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	<p>The Medicines component SHALL display, per medicine item, at least the following information:</p> <ul style="list-style-type: none"> • the medicine name (<medicineTitle>); and 	Mandatory

ID	Conformance Points	Status
	<ul style="list-style-type: none">the dose instructions.	

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: <ul style="list-style-type: none">Substance/Agent (<advReactionCause>);Reactions for that Substance/Agent (<advReactionManifestation>); andReaction 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: <ul style="list-style-type: none">Date administeredVaccine name (as recorded on the Shared Health Summary); andVaccine 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.	Mandatory

ID	Conformance Points	Status
	<p><i>Rationale</i></p> <p>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.</p>	

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 My Health Record system for the current patient within the last twelve (12) months.

This section will have no information available if the patient has not had any documents uploaded to the My Health Record system.

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.

Documents available in the My Health Record in the last 12 months

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

Group by Not grouped

Date	Document Type	Author Name	Author Role	Organisation Name
25-Oct-2013	Personal Health Summary	Frank Harding	General Medical Practitioner	Sydney Central Lab
15-Sep-2013	Specialist Letter	Dr Yue James	Cardiologist	SA Health
10-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
12-Jul-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	General Medical Practitioner	Franklin Hospital
10-Jun-2013	Personal Health Summary	Frank Harding	General Medical Practitioner	Franklin Hospital
09-Jun-2013	Discharge Summary	Dr Environment Good	Intensive Care Specialist	Forties Hospital
15-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 5: Recent Documents are available diagram

ID	Conformance Points	Status
View-HRO78	The View SHALL display the component title “Documents available on the My Health Record in the last 12 months”.	Mandatory
View-HRO80	The Recent Documents component SHALL display the following column labels:	Mandatory

ID	Conformance Points	Status
	<ul style="list-style-type: none">• Date;• Document Type;• Author Name;• Author Role; and• Organisation Name.	

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 My Health Record. 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.

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



Figure 6: Links to Views are available diagram

ID	Conformance Points	Status
View-HRO420	<p>Hyperlinks displayed in the Other Links section SHALL use the data element </healthRecordOverviewResponse/otherLinks/link/linkTitle> to label the link.</p> <p>NOTE: The recommended description that is displayed below each link is specified in subsections below.</p> <p><i>Rationale</i></p> <p>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.</p> <p>Using the text provided in the XML enables universal and consistent naming and centralised management of titles.</p>	Mandatory
View-HRO10	<p>If the CIS renders a link for a View that contains no information then the CIS SHALL indicate that the View contains no information.</p>	Mandatory

ID	Conformance Points	Status
	<p><i>Rationale</i></p> <p>The user should be informed that a View contains no information prior to activating the link.</p>	

Personal Health Summary

ID	Conformance Points	Status
View-HRO58	<p>Under the Personal Health Summary link title, the View SHOULD display a link description:</p> <p>“Summary of personal health information such as medications, allergies and adverse reactions added by the individual or an authorised representative to the My Health Record.”</p>	Recommended

Pathology Reports

ID	Conformance Points	Status
View-HRO64	<p>Under the Pathology Report View link title, the View SHOULD display a link description:</p> <p>“Pathology reports available on the My Health Record.”</p>	Recommended

Diagnostic Imaging Reports

ID	Conformance Points	Status
View-HRO70	<p>Under the Diagnostic Imaging Report View link title, the View SHOULD display a link description:</p> <p>“Diagnostic Imaging reports available on the My Health Record.”</p>	Recommended

Health Check Assessment Schedule

ID	Conformance Points	Status
View-HRO76	<p>Under the Health Check Assessment Schedule link title, the View SHOULD display a link description:</p> <p>“Questionnaires completed by a parent or an authorised representative at scheduled intervals to help monitor a child’s growth and development available on the My Health Record.”</p>	Recommended

Prescription and Dispense

ID	Conformance Points	Status
View-HRO67	<p>Under the Prescription and Dispense link title, the View SHOULD display a link description:</p> <p>“Prescription and Dispense records available on the My Health Record.”</p>	Recommended

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 My Health Record.”	Recommended

Pharmacist Shared Medicines List

ID	Conformance Points	Status
View-HRO56	Under the Pharmacist Shared Medicines List link title, the View SHOULD display a link description: “Pharmacist Shared Medicines List documents available on the My Health Record”.	Recommended

Advance Care Document Custodian record

ID	Conformance Points	Status
View-HRO73	Under the Advance Care Document Custodian record link title, the View SHOULD display a link description: “Advance Care Document Custodian contact details available on the My Health Record.”	Recommended

Advance Care Information

ID	Conformance Points	Status
View-HRO112	Under the Advance Care Information link title, the View SHOULD display a link description: “Advance Care Information documents available on the My Health Record.”	Recommended

Action required when clicking Other links

Each ‘Other Link’ is to be a clickable item to display the available information associated with that link to the user. There are two types as described below.

Document Links

Where the Other Link has a <linkType> equal to ‘Document’ the <linkTarget> will contain both the Repository Unique Id and Document Unique Id required to retrieve the document via the GetDocument web service. When the user clicks the link the system it to retrieve and render the referenced document.

LinkTarget Syntax:

pcehr:[Repository Unique Id]/[Document Unique Id]

View Links

Where the Other Link has a <linkType> equal to ‘View’ the <linkTarget> will contain the name of the view to be displayed. When the user clicks this link the system it to render the view. The table below maps the view to be displayed for each Link Target type.

linkTarget value	View to be displayed
AdvanceCareInformationList	Call the GetDocumentList web service filtered by the ClassCodes for the following document types: <ul style="list-style-type: none">Advance Care InformationAdvance Care Directive Custodian Record
DiagnosticImagingView	Call GetView web services for the following view: <ul style="list-style-type: none">DiagnosticImagingReportView
HealthCheckAssessmentView	Call GetView web services for the following view: <ul style="list-style-type: none">HealthCheckScheduleView
MedicareOverview	Call GetView web services for the following view: <ul style="list-style-type: none">MedicareOverview
PathologyIndexView	Call GetView web services for the following view: <ul style="list-style-type: none">PathologyReportView
PharmacistSharedMedicinesList	Call the GetDocumentList web service filtered by the ClassCodes for the following document types: <ul style="list-style-type: none">Pharmacist Shared Medicines List
PrescriptionAndDispenseView	Call GetView web services for the following view: <ul style="list-style-type: none">PrescriptionAndDispenseView

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 in the My Health Record since the last Shared Health Summary

 There are no Documents available in the My Health Record since the last Shared Health Summary.

Shared Health Summary

 No Shared Health Summary available.

Documents available in the My Health Record in the last 12

 There are no Documents available in the My Health Record since the last Shared Health Summary available on the My Health Record 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

▼ Immunisations0 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 diagram

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 My Health Record 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 My Health Record in the last 12 months”.	Mandatory
View-HRO11	A Medicines Component which returns no information (<informationAvailable value=“false” />) SHALL display the appropriate exclusion statement: “No known medication information available” or “No supplied medication information available” depending on the <code> or <displayName> value.	Mandatory
View-HRO17	An Allergies and Adverse Reactions Component which returns no information (<informationAvailable value=“false” />) SHALL display the appropriate exclusion statement: “No known allergies or adverse reaction information available” or “No supplied allergies or adverse reaction information available” depending on the <code> or <displayName> value.	Mandatory
View-HRO24	An Immunisations Component which returns no information (<informationAvailable value=“false” />) SHALL display the appropriate exclusion statement: “No known immunisation information available” or “No supplied immunisation information available” depending on the <code> or <displayName> value.	Mandatory

Additional display features

The following examples of the View provide suggestions for 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.

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 in the My Health Record since the last Shared Health Summary

Show Event Summaries Only (with Clinical Synopsis if available) ☒ ?

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

Document 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 in the My Health Record in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available) ☒ ?

Group by

Not grouped

Document 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

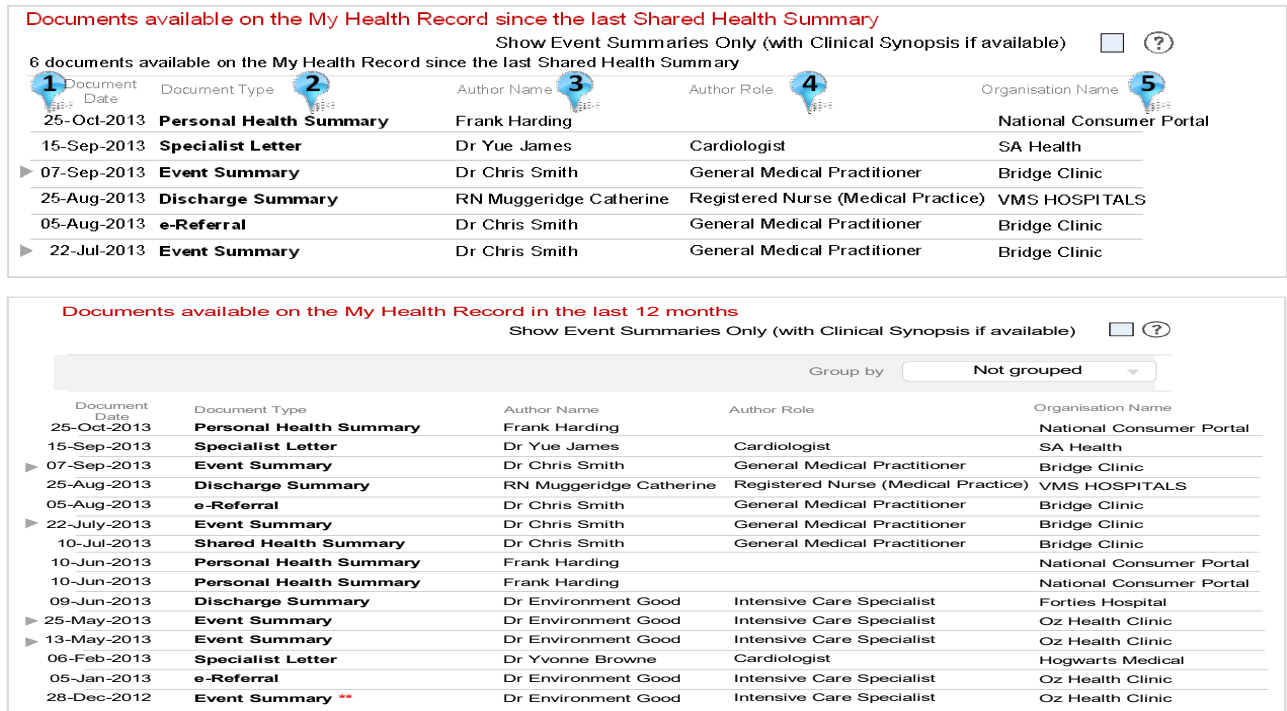


Figure 8: Filtering diagram

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

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.

Group By menu

ID	Conformance Points	Status
View-HRO200	The following Group By menu SHOULD be displayed: <ul style="list-style-type: none">Document Type;Organisation Name; andNot grouped (Default).	Recommended

Document Type

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

Documents available in the My Health Record in the last 12 months

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

Group by

Document Type ▼

Document Type

Personal Health Summary

Discharge Summary

e-Referral

Event Summary

Shared Health Summary

Specialist Letter

Figure 9: Document Type diagram

ID	Conformance Points	Status
View-HRO86	The Group By menu SHOULD display “Document Type” to signify Group By Type has been applied.	Recommended
View-HRO87	The View SHOULD display the label “Document Type”.	Recommended
View-HRO88	Under the label Document Type, the View SHOULD display the Document Type summary line.	Recommended

Organisation Name

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

Documents available in the My Health Record in the last 12 months

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

Group by

Organisation Name ▼

Organisation Name

No organisation

Bridge Clinic

Forties Hospital

Franklin Hospital

Hogwarts Medical

Oz Health Clinic

SA Health

Sydney Central Lab

VMS Hospital

Figure 10: Organisation Name diagram

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

Not grouped

The grouping by 'Not grouped' is the default grouping of the Recent Documents component of the View. It displays a list of documents returned from the My Health Record system and is based on the Event Date/Time or Effective Date/Time for each document, whichever is available in the My Health Record.

Documents available in the My Health Record in the last 12 months

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

Group by

Not grouped

Date	Document Type	Author Name	Author Role	Organisation Name
25-Oct-2013	Personal Health Summary	Frank Harding	General Medical Practitioner	Sydney Central Lab
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
02-Jul-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	General Medical Practitioner	Franklin Hospital
10-Jun-2013	Personal Health Summary	Frank Harding	General Medical Practitioner	Franklin Hospital
09-Jun-2013	Discharge Summary	Dr Environment Good	Intensive Care Specialist	Forties Hospital
05-May-2013	Event Summary	Dr Environment Good	Intensive Care Specialist	Oz Health Clinic
03-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 11: Not grouped diagram

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

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.

Collapsed Views

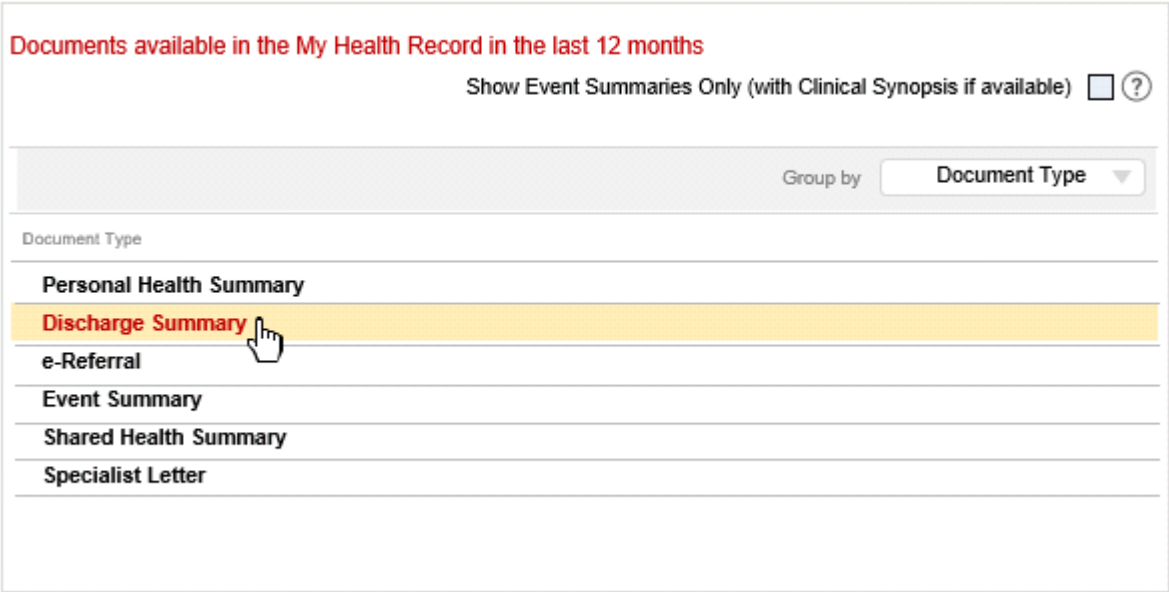


Figure 12: Collapsed Views diagram

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

Expanded Group By Menu

Documents available in the My Health Record in the last 12 months

Available on the PCEHR in the last 12 months

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

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 require d 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

Documents available in the My Health Record in the last 12 months

Show Event Summaries Only (with Clinical Synopsis if available)

Group by Organisation

Organisation Name

No organisation

Bridge Clinic

Forties Hospital

Franklin Hospital

Hogwarts Medical

Oz 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

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 **

SA Health

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

Sydney Central Lab

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

VMS Hospital

** Event Summary with no Clinical Synopsis Description

Figure 13: Expanded Views diagram

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: <ul style="list-style-type: none">Date;Document Type;Author Name;Author Role; andOrganisation Name.	Recommended
View-HRO95	When the Group By menu is selected, the expanded Document Lines SHOULD NOT display the following default labels: <ul style="list-style-type: none">Date;Document Type;Author Name;	Recommended

ID	Conformance Points	Status
	<ul style="list-style-type: none">Author Role; orOrganisation Name.	

Clinical Synopsis



** Event Summary with no Clinical Synopsis Description

Figure 14: Clinical Synopsis diagram

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 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
PCHER	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
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 My Health Record 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

- LSS DH-2945:2019
My Health Record B2B Gateway Services – View Service Logical Service Specification v1.5
Australian Digital Health Agency, 2019
<https://developer.digitalhealth.gov.au/specifications/national-infrastructure/ep-2933-2019/dh-2945-2019>
- TSS DH-2946:2019
My Health Record B2B Gateway Services – View Service Technical Service Specification v1.9
Australian Digital Health Agency, 2019
<https://developer.digitalhealth.gov.au/specifications/national-infrastructure/ep-2933-2019/dh-2946-2019>