Canada Health Infoway

Connected Care

Pan-Canadian Patient Summary Overview

May 7, 2024

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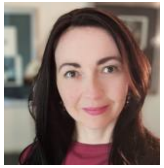
About Me



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- Background: Business Analysis, Product and Account Management, Project Management Professional

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What is a Patient Summary?

- ✓ A standardized set of **basic clinical data**, which includes the most important health and care related information about the patient, such as medications they are taking, any allergies or intolerances they have and their key medical issues.

- ✓ This summarized version of a patient's clinical data provides health professionals the **essential information needed at the point of care**, such as during medical emergencies, walk-in clinic visits, and transitions of care.

It represents a minimal and non-exhaustive set of clinically relevant standardized patient data, which is specialty-agnostic and condition-independent, but readily usable by patients and authorized health care providers.

https://international-patient-summary.net/

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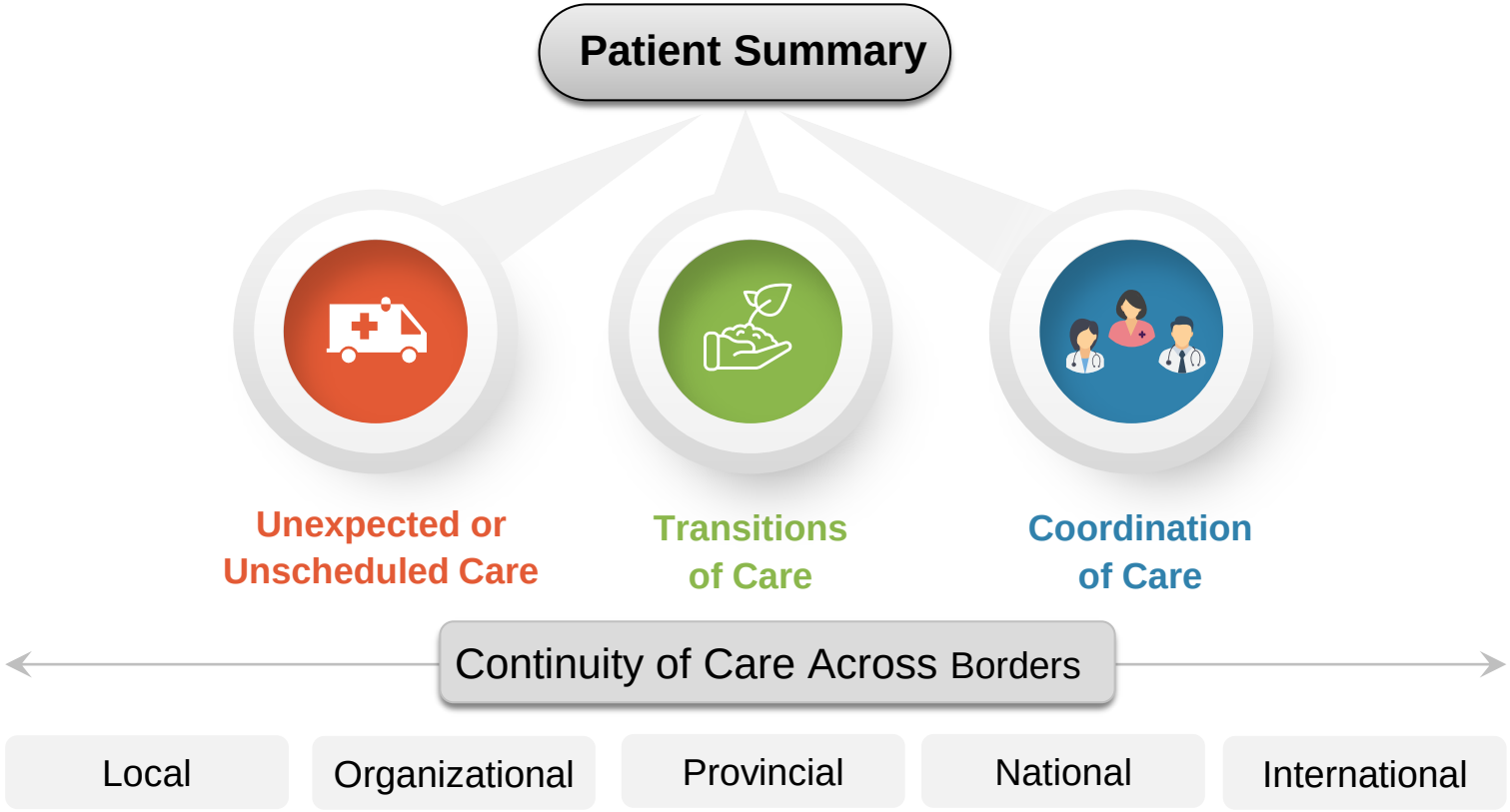
Patient Summary Supports Care Across Borders



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How can the Patient Summary Benefit Canadians?

PATIENTS

Improved patient experience due to more efficient and comprehensive data sharing between providers, leading to improved health outcomes.

Improves patient autonomy by having the ability to access and share their own personal health information.

HEALTH CARE FUNDERS

Reduction in costs and time to implement patient summary and interoperability solutions due to availability of reusable data content and technical profiles that reflect 80+% of the common requirements.

Availability of more reliable automated reporting to better target health care spending according to need.

JURISDICTIONS

Reduction in implementation burden due to centralized expertise in niche interoperability areas and reusable profile components, which also reduce resource demands.

Ability to reuse data content and technical profiles that reflect 80+% of the common requirements, decreasing implementation timelines.

Promotes better scalability and enhancements for patient summary solutions with minimal effort into the future where vendors can incorporate new elements without jurisdictional oversight.

VENDORS

Ability to reuse significant number of standardized components to implement across all jurisdictions with minimal variability.

Reduction in implementation time.

Coordinated approach for all jurisdictions reduces complexity and resource requirements.

Alignment to global specifications and standards also supports international vendors who will no longer need to specialize their solutions for Canada.

CLINICIANS & HEALTH CARE PROVIDERS

Improved efficiency in information sharing – reduces administrative burden.

Improves effective patient care assessment and diagnosis due to having access to a more complete patient health care story which consolidates multiple data domains.

Key Considerations When Implementing the Patient Summary

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

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Why the Patient Summary? How can it help?

W

WHY

?

What are the Key Challenges to be Solved with the Patient Summary?

(e.g., unattached patients, cross-border care)

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

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Patient Summary Structure, Contents & Testing

PS-CA: Based on International Specifications and Standards

The **pan-Canadian Patient Summary (PS-CA) is an implementable, testable specification**, based on the **International Patient Summary (IPS)**, as defined by IHE International Patient Summary Specification, HL7 IPS Implementation Guide, CEN-EN 17269 and ISO/DIS 27269.

The PS-CA FHIR profile set is as closely aligned to the HL7 IPS-UV specification as possible, while still supporting localized needs and reducing barriers to early adoption.

It defines the **content data and interoperability building blocks** needed to **create and share patient summaries.**

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What was our Approach to Building the Patient Summary?

Patient Summary-CA: Data Domains of Interest by Canadian Jurisdiction and Release

	IPS-UV		PS- CA	AB	BC	MB	NL	ON	SK	v1.0.0 TI	v1.1.0 DFT	v2.0.0 DFT
Header	Subject	Header	Subject									+
	Author		Author									+
	Attester		Attester									+
	Custodian		Custodian									+
Required	Medication Summary	Recommended	Medication Summary									+
	Allergies and Intolerances		Allergies and Intolerances									+
	Problem List		Problem List									+
Recommended	Immunizations		Immunizations									+
	History of Procedures		History of Procedures									+
	Medical Devices		Medical Devices									
	Diagnostic Results		Diagnostic Results									+
Optional	Vital Signs	Optional	Vital Signs									+
	Past history of Illness		Past History of Illness									+
	Social History		Social History									+
	Advance Directives		Advance Directives									
	Pregnancy		Pregnancy									
	Functional Status		Functional Status									
	Plan of Care		Plan of Care									
		EXT	Extension(s)									
			Family History									+

Infoway orchestrated a **collaborative process** to understand jurisdictional needs and the required flexibility for the design of PS-CA, to reach a **consensus on priorities** and develop a consolidated set of requirements.

Legend
- **Blue**: header domains
- **Red**: required domains
- **Orange**: recommended domains
- **Green**: optional domains
- **Grey**: common domains by jurisdiction
- **White**: domains not identified by jurisdictions as priority and/or not included in the PS-CA v1.0.0 TI or PS-CA v1.1.0 DFT releases
- **+** modifications/enhancements to existing data domains

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Solving Interoperability Challenges – Core Concepts

To solve **interoperability challenges**, IHE International has developed a process that **brings together clinicians, jurisdictions, vendors and, developers** of healthcare information technology (HIT) in an annually recurring four-step process.

Clinical, technical and jurisdictional experts define critical use cases and business requirements for solving a problem (e.g., Sharing Patient Summaries).

Technical experts create detailed specifications for Patient Summaries to address these use cases, selecting and optimizing established standards.

Industry implements specifications called Integration Profiles in various HIT systems and solutions.

Allows vendors to demonstrate interoperability and conformance to the specification for the Patient Summary by testing their systems at carefully planned events called Connectathons and Projectathons.

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Read more about the Canadian Projectathons here.

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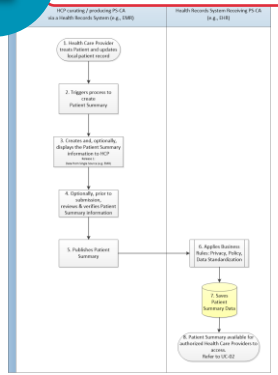
IHE Informed Product Components

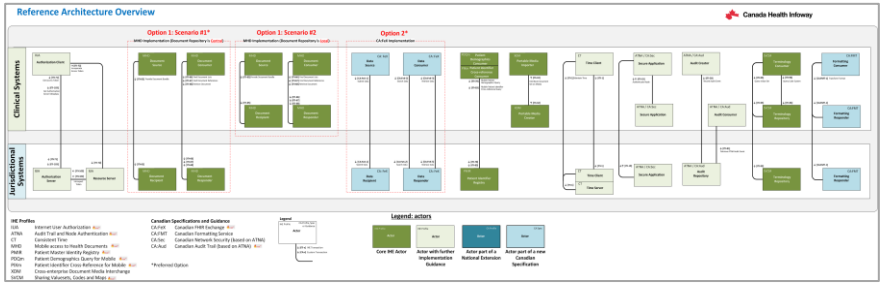
1 Business Definition



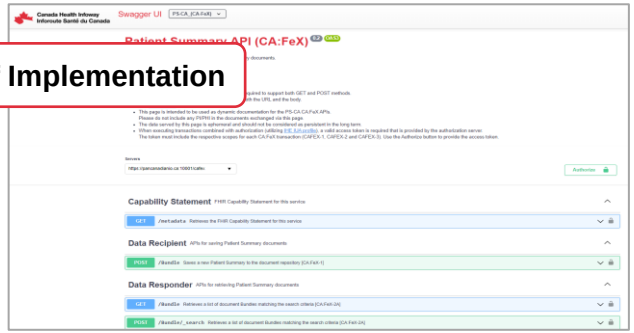
Specifications

USE CASE ACTOR	SERVICE SUPPORTED	OPT	TECHNICAL ACTOR	OPT	PROFILE / STANDARD
PS-CA Producer	Authenticate User	O	Client (e.g., EMR)	O	Internet User Authorization (IUA)
	Identify Patient	O	Client (e.g., EMR)	O	Use Existing Standards Employed by the Clinical System
		O	Patient Demographic Consumer	O	PDQm
	Retrieve clinical data from local data sources (Patient Identifier)	R	Client (e.g., EMR)	R	Use Existing Standards Employed by the Clinical System
	Assemble and review Patient Summary	R	Client (e.g., EMR)	R	Use Existing Standards Employed by the Clinical System
	Update Current Valuesets and ConceptMaps	O	Client (e.g., EMR)	O	SVCM
	Omit or Mask Data based on Jurisdictional Policy	O	Client (e.g., EMR)	O	Jurisdictional Requirement
	Save PS-CA to Document Repository	R	Client (e.g., EMR)	R	Use Existing Standards Employed by the Clinical System
		R	Data Source	R	CA FeX
Document Repository (Central)*	Save PS-CA to Document Repository	R	Data Recipient	R	CA FeX
Central Infrastructure	Identify Patient	O	Patient Identity Registry	O	PMIR

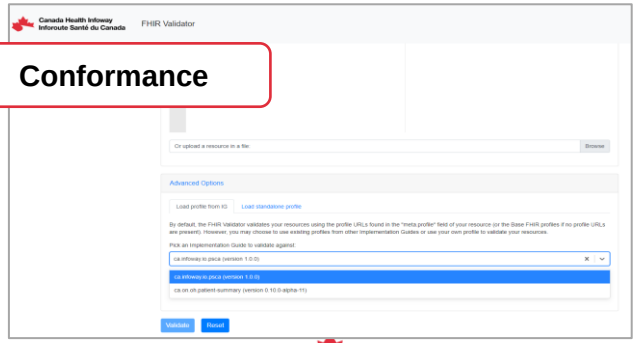
2 Technical



3 Ref Implementation



4 Conformance



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Testing the Patient Summary - Projectathon 2023

- The purpose of the Projectathon was to test the PS-CA and PS-ON (Ontario patient summary implementation guidance) specifications with a focus on both content and exchange
- Nine vendors completed over 200 tests both individually and collaboratively related to:
  - Security and authorization
  - Transport of a patient summary
  - Assessment of FHIR documents against PS-CA and PS-ON
- **7/9** vendors were able to successfully interact with the retrieve data transaction
- **2/9** vendors were able to demonstrate the ability to create a well-formed patient summary (PS-CA) document
- **One** vendor was able to partially demonstrate ability to create a well-formed PS-ON document
- **All** vendors showed some capability of being able to submit a patient summary (either via a PS they created or a sample that was provided

Participating Systems from:

TELUS Health, VeroSource Solutions, akinox, smile DIGITAL HEALTH, ORACLE, VERTO, enovacom, WELL Health, MICROQUEST, Canada Health Infoway

Total Profiles Tested	Total Tests Conducted	Total No-Peer Tests	Total Peer-to-Peer Tests	Total Submitted PS-CA Tests	Total Submitted PS-ON Tests
6	203	144	59	3	1

To learn more about the Projectathon, click here.

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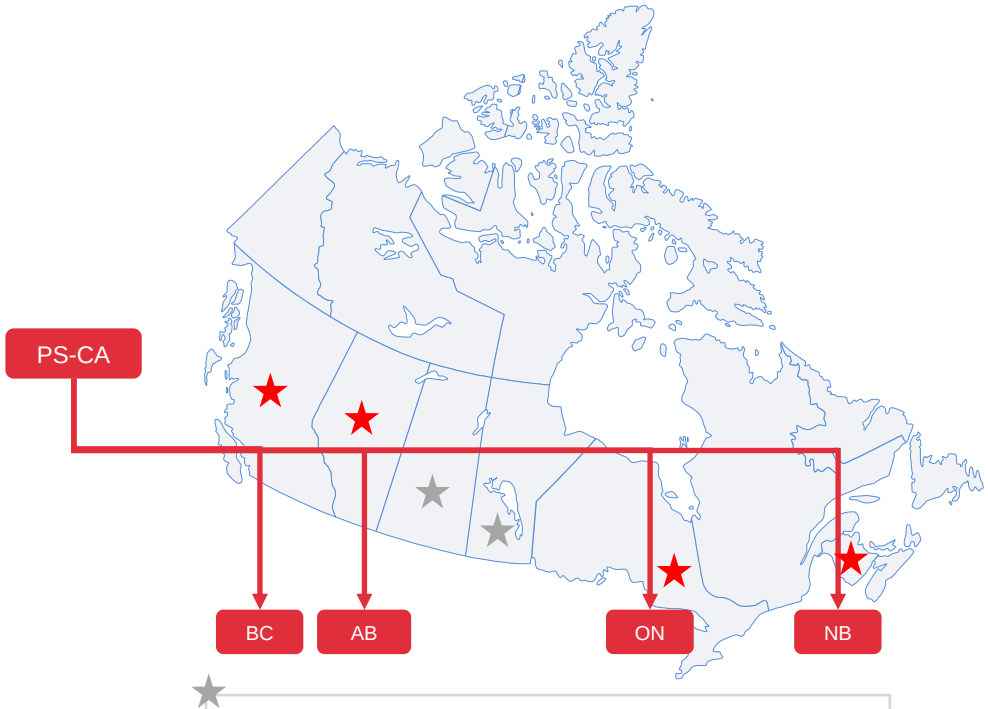
Patient Summary Implementations

Current Patient Summary Initiatives



SK and MB: Prior to the pan-Canadian Patient Summary initiative, MB and SK implemented “patient summary-like” initiatives. Each have similar data sets and are planning alignment with the PS-CA.

Committing to a **core pan-Canadian approach** (e.g., core data model, minimum must support values, cardinality, etc.) requiring **minimal configurations** to meet **intra-jurisdictional needs** without limiting the future of **inter-jurisdictional exchange.**

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Current State: LPR/MVP Snapshot

Creation of PS:
- Created & reviewed by Primary Health Care Provider; submitted real-time
- Generated automatically daily and submitted via scheduled batch

Implementation patterns include:
- EMR to Central Repository
- EMR to HIS (point-to-point exchange upon request or proactively)

Clinical engagement:
All PT's have brought in clinical engagement to inform workflow approaches and understand the barriers to adoption.

PS-CA alignment:
All PT's have worked with Infoway to align with the PS-CA, while still allowing for some local configurations to meet jurisdictional policies.

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Learn more about PS Innovative Technologies

Progress on the next use cases, combining the Patient Summary with innovative technologies, is underway in Canada**;** taking another step toward improving the provider and patient experience and ensuring the right information is available at the point of care.

PS + AI

In November 2023, at the Canada Health Infoway Partnership conference, Infoway hosted a session called “Demonstrating the Value of the Patient Summary to Inform Care Delivery and Enable a Better Patient Experience”. In this session, the **power of AI was combined with the Patient Summary**.
Watch a short demo here.
British Columbia is currently developing a Proof of Concept for this use case.

PS + QR CODE

Leveraging International initiatives, such as the Washington State’s WAVerify+ system, Canada is making progress on the use case to provide patient’s with the ability to access and electively share their health data with access via a QR Code.

New Brunswick is currently developing a Proof of Concept for this use case. Scan this QR code to view a sample Patient Summary. →

Scan this QR code to view a sample Patient Summary for:
Homer J Thompson

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Patient Summary – Where we go from here…

- Supporting the provinces and territories with their Patient Summary implementations, roll-outs, including change management and adoption efforts
- Building both short and long-term roadmaps for alignment between jurisdictional, national and international specifications
- Developing the supporting building blocks (e.g., identity management, consent management, etc.) for expansion of Patient Summary use cases (e.g., inter-provincial and cross-international borders)
- Continued partnership with International teams to ensure we share lessons learned and best practices

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Questions

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Thank you!

Contact Information

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Helpful Links

Published specifications (available on InfoScribe):

- PS-CA v1.1.0 DFT
- CA:eReC v1.0.0 DFT-Ballot
- CA:FeX v2.0.0 DFT-Ballot
- CA Core+ v0.1.0 DFT-Ballot

Working Groups (hosted on InfoCentral):

- Patient Summary
- eReferral
- + Many more!

Projectathon Information (available on InfoScribe):

- Overview of Projectathons
- 2023 Final Report

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