



MedicalDirector®
CLINICAL

Practice Incentives Program (PIP) eHealth Incentive

Requirement 5b – Personally Controlled Electronic Health Records

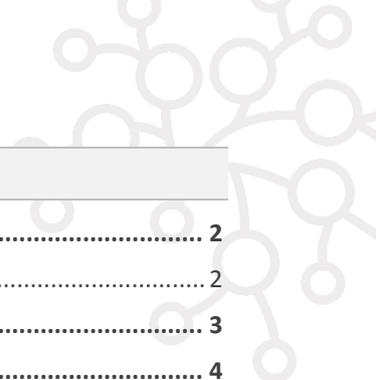
Creating and Managing CDA e-Health Documents for PCEHR

This guide explains how to create CDA e-Health documents in MedicalDirector Clinical. It then explains how to upload them to, and download them from the PCEHR system, and how to supersede documents that exist within the System.

This guide is designed for users with a working knowledge of MedicalDirector Clinical, its Letter Writer module, and the PCEHR system.

The functionality described within requires that your Practice, Practitioners/Users, and Patients are **already** registered/configured for PCEHR. Comprehensive instructions for such are available from the MedicalDirector web site at <http://medicaldirector.com/gp+cl+ehealth/gp+cl+ehealth/video+guides>





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Important Notes

- CDA e-Health documents cannot be accessed from outside a patient's record.
- These templates have been specified at a National level, and so cannot be modified unless by directive from DOHA/NEHTA. When creating any CDA document, data marked as confidential, or data under the Surgical Audit Tool tab will *not* be included on the CDA form.
- As CDA e-Health documents can be shared between registered practitioners via systems such as MDEXchange and PCEHR, it is important that you understand, that as an author of a CDA document, you are responsible for its content.

Before You Begin

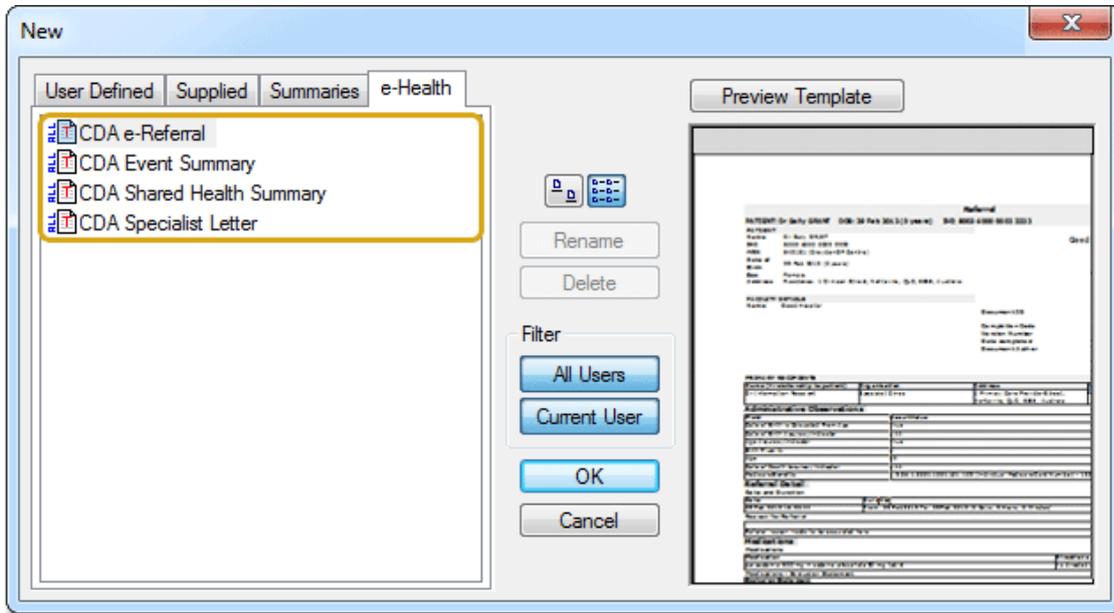
Event Summaries and Shared Health Summaries can be uploaded directly to PCEHR (as explained below), these can also be sent to a recipient via MDEXchange or third-party transport (if required). However, e-Referrals and Specialist Letters can be sent to recipients via MDEXchange or via external transport; uploading them to PCEHR is *optional*.

It is important to note that it is a requirement of **e-Referrals** and **Specialist Letters** that you specify at least one recipient **before** they can be sent (and subsequently uploaded to PCEHR). As such, it is **essential** that you ensure your Address Book is up-to-date with the minimum recipient information indicated below.

- Full Name
- Address
- Category
- HPI-I (Healthcare Provider Identifier – Individual) Number
- At least one of the following; Email Address, Work Phone, Mobile Phone, Fax, A/H Phone, Pager.

Creating a CDA e-Health Document

1. Ensure you are within a patient's record and have opened Letter Writer.
2. Within Letter Writer, select **File > New**.
3. From the **New** dialogue box, select the e-Health tab and then double-click a CDA e-Health template.

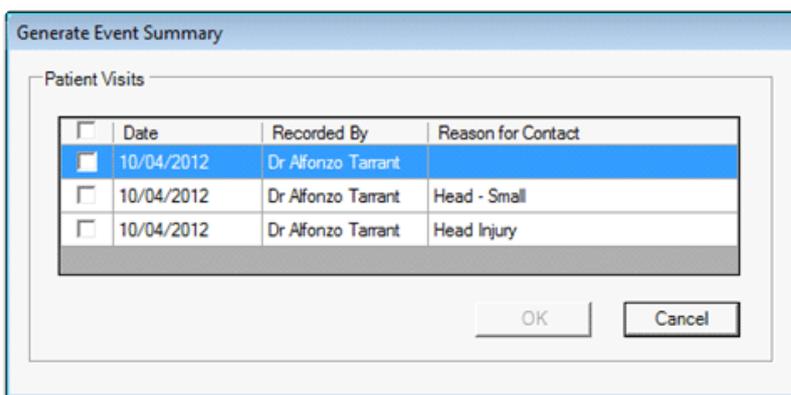


*Note that these templates will auto-populate with patient data, as drawn from the patient's record in MedicalDirector Clinical. Note also that any clinical data (for example Procedures, Problems/Diagnoses, Medical History) is drawn from the Past History tab of the patient's record, **not** the patient's Progress Notes. Similarly, allergy data is drawn from the Allergies section in MedicalDirector Clinical.*

4. A new CDA e-Health document is generated for you to complete. Complete it as desired; record information, and/or remove any lines or sections as you wish. Note that information you add here will *not* be written back to the patient's record.

If you wish to indicate that a document contains sensitive information:

- Where you or your patient feels that particular information is of a sensitive nature, enter the text 'Sensitive Information';
 - Into the 'Reason for Referral' field of an e-Referral.
 - Into the 'Response Narrative' field of a Specialist Letter.
- In an Event Summary, you will be prompted to select the relevant Patient Visits to include.



This concludes the steps necessary for creating a CDA e-Health Document. Continue below for information on the various options for uploading the document to PCEHR.

Uploading CDA e-Health Documents to PCEHR

There are two options for uploading CDA e-Health documents to PCEHR;

- [Option 1](#): During the process of creating a CDA e-Health Document.
- [Option 2](#): Via the Correspondence, Letters, Documents, or Results tabs in the patient’s record.

Option 1: During the Process of Creating a CDA e-Health Document

During the process of creating a CDA document, there are three methods for uploading it to PCEHR;

- [By Pressing the !\[\]\(7a8011739ec4e250e2f89a547d75fb0a_img.jpg\) button](#) – Upload directly to PCEHR
- [By Pressing the !\[\]\(07dce76283bf618e2364d95ae0021e26_img.jpg\) button](#) – Send to a specific recipient via MDEXchange, *and* upload to PCEHR by ticking the ‘Send to PCEHR’ check box as shown below.
- [By Pressing the !\[\]\(44ee86b940d3a0ca166486da8985875e_img.jpg\) button](#) – Send to a specific recipient via External Transport, *and* upload to PCEHR by ticking the ‘Send to PCEHR’ check box as shown below.

By Pressing the Button.

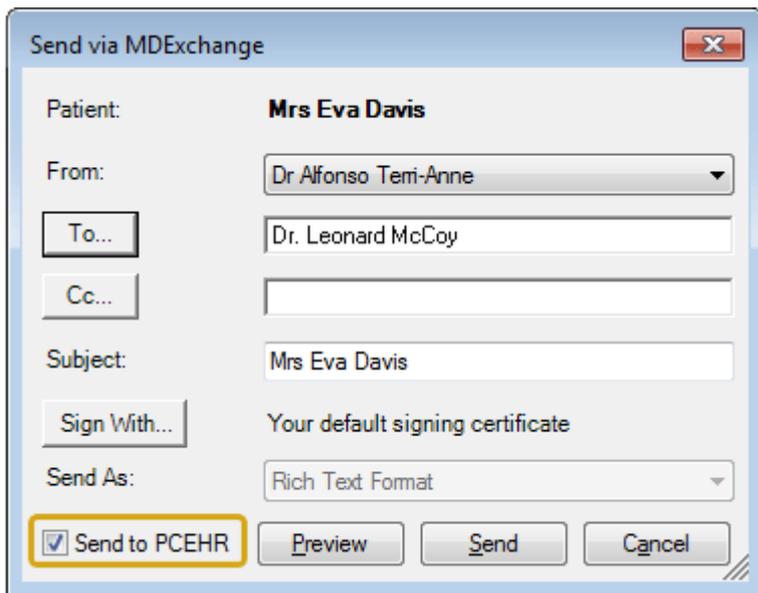
This button is available for **Event Summaries** and **Shared Health Summaries**.

Upon clicking this button, the document is uploaded to PCEHR, and a copy is saved to the patient’s record.

By Pressing the Button.

This button is available to all CDA eHealth documents, used primarily for sending **e-Referrals** and **Specialist Letters** using the **Send via MDEXchange** window.

1. Click the  button on the toolbar. The **Send via MDEXchange** window appears.
2. Complete the form, ensuring that you tick the **Send to PCEHR** check box. By doing so, upon sending the document to the recipient, a copy is *also* uploaded to PCEHR.



Send via MDEXchange

Patient: **Mrs Eva Davis**

From: Dr Alfonso Terri-Anne

To: Dr. Leonard McCoy

Cc:

Subject: Mrs Eva Davis

Sign With: Your default signing certificate

Send As: Rich Text Format

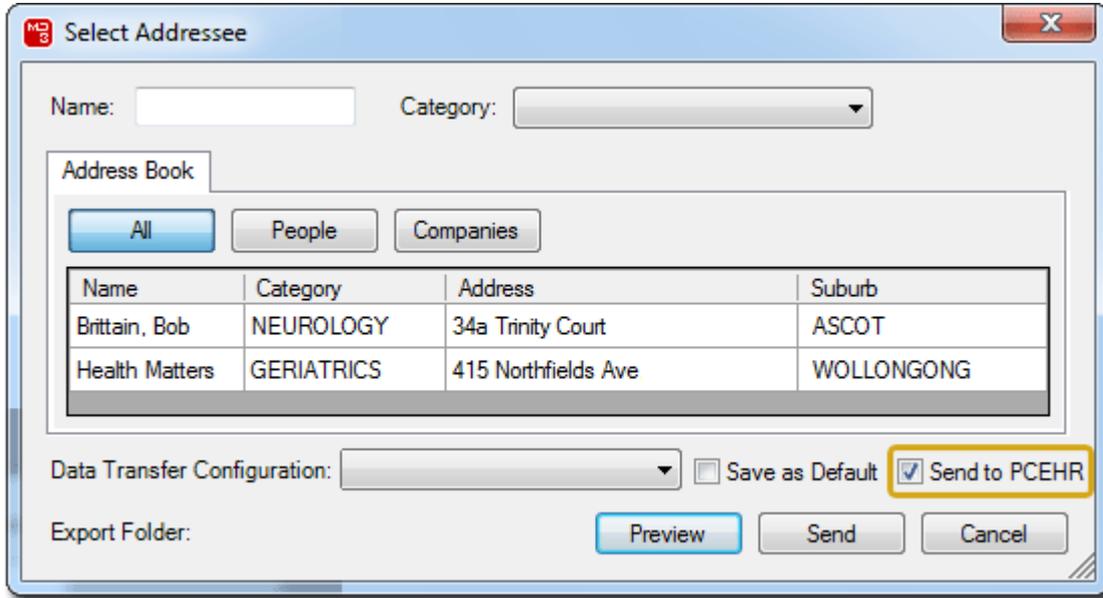
Send to PCEHR

Preview Send Cancel

By Pressing the Button.

This button is available to all CDA eHealth documents, and is used primarily for sending **e-Referrals** and **Specialist Letters** via *External Transport* using the '**Select Addressee**' window.

1. Click the  button on the toolbar. The **Select Addressee** window appears.
2. Complete the form, ensuring that you tick the **Send to PCEHR** check box. In this way, upon sending the document to the recipient, a copy is *also* uploaded to PCEHR.

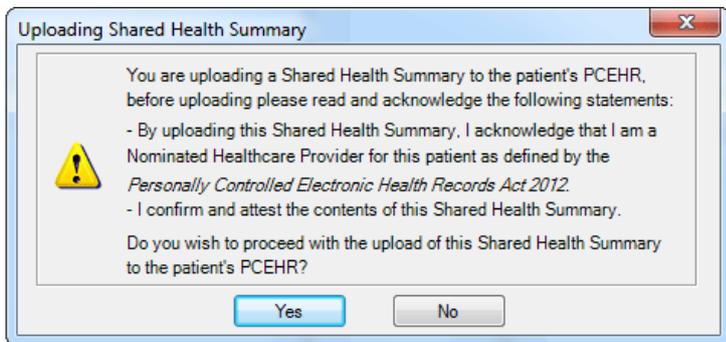


Name	Category	Address	Suburb
Brittain, Bob	NEUROLOGY	34a Trinity Court	ASCOT
Health Matters	GERIATRICS	415 Northfields Ave	WOLLONGONG

Option 2: Via the Correspondence, Letters, Documents, or Results tab in the Patient's Record.

If during the process of creating a CDA e-Health document you did *not* send it to PCEHR, you can do so later.

1. Within the patient's record, locate the document you wish to upload from either of the Correspondence, Documents, Results, or Letters tabs.
2. Click the **Send to PCEHR** button in the tool bar. You will be presented with a preview of the document. *You can also right-click a selected document to access this button.*
3. If you are satisfied that this is the document you wish to upload, click the **Send** button on the preview window. Note that if the document you are uploading is a Shared Health Summary, you will be prompted to acknowledge that you are a Nominated Healthcare Provider for the patient and that you confirm and attest the contents of the document.



4. Click the **Yes** button if you wish to proceed.

The upload will commence and you will be notified upon completion. The 'PCEHR Status' and 'PCEHR Activity Date' columns within the correspondence tabs of the patient's record will indicate the selected document's PCEHR status.

Downloading Documents from PCEHR

1. Within the patient's record, select the **PCEHR** menu. You will be presented with the **PCEHR** window.
2. Locate and select the document you wish to download.
3. Click the **Save in MD** button.
 - If the document is of type 'Shared Health Summary' or 'Event Summary' it is saved to the Documents tab of the patient record. Documents of type 'e-Referral' or 'Specialist Letter' are saved to the Letters tab.
 - If the document already exists in the patient's record (it has already been downloaded from PCEHR), you will be notified accordingly.
 - If the document already exists in the patient's record, but on the PCEHR system there is a newer version of it, the document will be downloaded to the patient's record, and the older version will be retained within the patient's record for historical purposes.
 - The 'PCEHR Status' and 'PCEHR Activity Date' columns within the Documents/Letters tabs will indicate the selected document's PCEHR status, such as 'Uploaded', 'Downloaded', 'Superseded', or 'Removed'.

Superseding CDA e-Health Documents

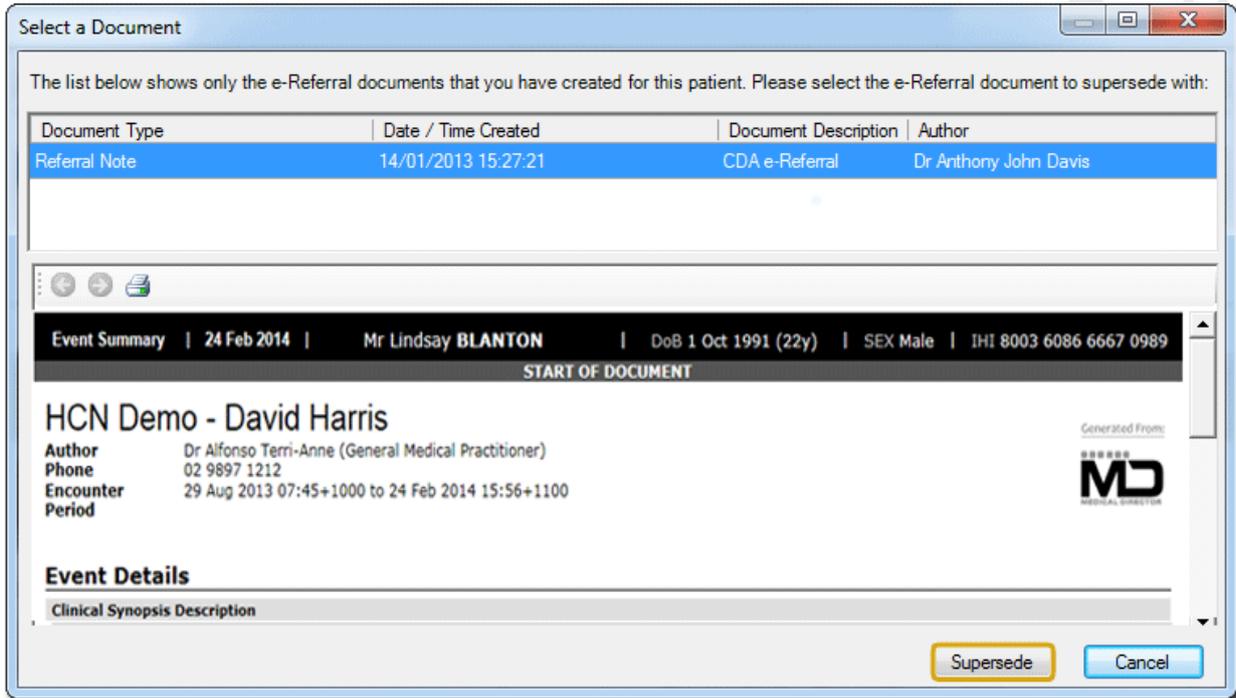
- A Shared Health Summary *cannot* be superseded.
- You can only supersede a document with the same type of document. For example: an e-Referral can only be superseded by another e-Referral.

1. Access PCEHR.
2. Within the PCEHR window, locate the document you wish to supersede, and either;
 - Right-click the document and select Supersede from the menu that appears, or
 - Click the **Supersede** button.

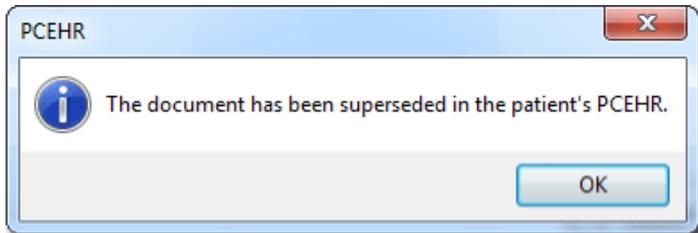
The screenshot shows the PCEHR interface for patient IHI: 8003 6023 4655 6635. It displays a table of documents with columns for Document Date, Service Date, Document, Organisation, Organisation Type, Author, and Size. A context menu is open over the document list, highlighting the 'Supersede' option. Below the table, there is a preview of a document titled 'HCN Demo - David Harris' by Dr Alfonso Terri-Anne. The preview includes patient information (Mr Lindsay BLANTON, DoB 1 Oct 1991 (22y), SEX Male, IHI 8003 6086 6667 0989) and event details. At the bottom of the preview, there are buttons for 'Create Clinical Document', 'Supersede', 'Remove from PCEHR', 'Save in MD', and 'Close'.

Document Date	Service Date	Document	Organisation	Organisation Type	Author	Size
05-Dec-2013			MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	12.9 KB
05-Dec-2013	11		MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	9.0 KB
16-Dec-2013	25		MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	9.6 KB
24-Feb-2014			MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	9.7 KB
24-Feb-2014		Event Summary	MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	9.7 KB
24-Feb-2014		Shared Health Summary	MEDTESTORGSB52	General Practice	Terri-Anne, Alfonso	11.5 KB

- The **Select a Document** window appears. Browse through the list of available documents from your patient's record, and select the document you wish to use to replace that within PCEHR.



- Click the **Supersede** button. The document will be uploaded to PCEHR, to replace the existing document.



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