

Recommended **Shared Health Summary enhancements** for GP software systems

These recommendations have been made to vendors by NEHTA's Clinical Usability Programme, following user feedback

Clinical Information System (CIS) screens are generic mock-ups and are not representative of any software vendor system

Contact your software vendor for information on how these enhancements will be incorporated in the software that you are using

The following mockups are a visual representation of CUP recommendations relating specifically to the Shared Health Summary. The enhancements demonstrated are:

1. Curating a shared health summary
2. Attesting a shared health summary

These example mockups have been updated to include the latest CUP R3 recommendations.

Clinical Scenario

A patient, Robert Smith, is visiting his GP, Dr Roger Harris. Robert has a digital health record and requests Dr Harris to upload a Shared Health Summary to the My Health Record system.

- Select Patient
- Patient Record
- My Health Record**
- Appointments
- Requests
- Forms
- Settings
- Quick Links
- Messages
- Log out
- Help

SMITH, Robert (Mr)

My Health Record page
 My Health Record system admin

46y

Gender Male

Home Address: 111/222 ABC Street, Sydney NSW 2000

Home Phone: (02) 22 33 44 55

Work Phone: (02) 55 66 77 88 99

Mobile: 0404 123 456

[View previous](#) [edit](#)

- Send Shared Health Summary**
- Send Event Summary
- Send eReferral
- View Documents
- Gain Access
- Emergency Access

Allergies and Adverse Reactions

Item	Reaction	Onset	Severity
Penicillin	Rash	1997	Severe
Ibuprofen	Urticarial	2000	Mild



My Health Record
 5 new clinical documents
 (since 03-Apr-2014)

In the My Health Record menu, doctor selects 'Send Shared Health Summary'

Note: vendors may provide users with other entry points to author and upload a Shared Health Summary e.g. by including a 'Send Shared Health Summary' link or button on the My Health Record page

- Notes
- Past Medical Hx
- Medicines
- Investigations
- Immunisation
- Correspondence
- Social History

Current Visit Progress Notes

Paragraph

B *I* U A ³A

Follow up painful left foot with an open wound.

Previous diagnosis: History of diabetes type 1, peripheral neuropathy and osteomyelitis left tibia. The wound on the left foot has been previously debrided. Report negative MRSA.

Current medications: Patient currently on EES 400mg twice daily. Silver alginate wound dressings.

Management: Discussed with patient the need for wound management with dressings, importance to complete the course of EES as prescribed, danger of infection and compromise on his peripheral circulation. Arrange GPMP and TCA for podiatry services. Review in a week.

Intensive Health, 15-Sep-2014

- Observations / Examination**
- General
 - Cardiovascular
 - Gastrointestinal
 - Respiratory
 - Genitourinary
 - Musculoskeletal
 - ENT
 - Eye
 - Skin
 - Psychiatric
- Previous Progress Notes**

- Reason for Visit
- Diagnosis
- Management
- Reminder

Close

1. Curating a shared health summary

Select Patient

Shared Health Summary – SMITH, Robert

SMITH

Home Address
Home Phone
Work Phone
Mobile

Notes

Past Medical Hx

Medicines

Investigations

Immunisation

Corre

Soci

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Novorapid inj 100/1ml	1 inj	Daily	Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Silver oxide cream 1%	1ml	Daily	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Frusemide 40mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Review Cancel

Psychiatric
Previous Progress Notes

Close

Software displays four lists of data sourced from the local patient record: *Medical History, Medications, Allergies/Adverse Reactions, Immunisation*

Note: If this is the first Shared Health Summary created, all items would be automatically selected for inclusion (unless specifically identified by user as not to be shared). By default, no items marked as confidential are shown on the Shared Health Summary.

SHS.04 (Mandatory); SHS.05 (Conditional); SHS.06 (Conditional)

Select Patient

Shared Health Summary – SMITH, Robert

SMITH

Home Address
Home Phone
Work Phone
Mobile

Notes

Past Medical Hx

Medicines

Investigations

Immunisation

Correspondence

Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Combined medical history list, with each row corresponding to one entry item in the local health record that corresponds to either a:

- procedure;
- problems/diagnosis ; or

SHS.09 (Mandatory); SHS.10 (Mandatory)

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Preview Cancel

Psychiatric
Previous Progress Notes

Reason for Visit Diagnosis Management Reminder

Close

Select Patient

Shared Health Summary – SMITH, Robert

SMIT

Home Address
Home Phone
Work Phone
Mobile

Notes

Past Medical Hx

Medicines

Investigations

Immunisation

Correspondence

Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Novorapid inj 100/1ml	1 inj	Daily	Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Silver oxide cream 1%	1ml	Daily	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Frusemide 40mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Immunisation

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	None K			

Only current medications are displayed (including ongoing medications).
 Medications are not displayed for inclusion if either they have been ceased (i.e. course completed) OR if they are linked to a confidential medical history item.

Reason for Visit Diagnosis Management Reminder [Psychiatric](#) [Previous Progress](#) [Notes](#) Close

Select Patient

Shared Health Summary – SMITH, Robert

- SMIT
- Home Address
- Home Phone
- Work Phone
- Mobile
- Notes
- Past Medical Hx
- Medicines
- Investigations
- Immunisation
- Correspondence
- Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Novorapid inj 100/1ml	1 inj	Daily	Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Silver oxide cream 1%	1ml	Daily	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Frusemide 40mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Reason for Visit: Diagnosis:

Preview Cancel

Automatic **selection** of items for inclusion in the shared health summary:

1. All new items are automatically selected (unless specified otherwise by the user not to share); OR
2. All items with a 'share to My Health Record' flag set to 'yes' (if applicable); OR
3. All items from the previously uploaded Shared Health Summary are automatically selected

Note: The user is able to de-select the items for inclusion in the shared health summary.

SHS.06 (Conditional); SHS.07 (Conditional); SHS.08 (Mandatory); SHS.21 (Mandatory)



Select Patient

Shared Health Summary – SMITH, Robert

SMIT

Home Address

Home Phone

Work Phone

Mobile

Notes

Past Medical Hx

Medicines

Investigations

Immunisation

Correspondence

Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Novorapid inj 100/1ml	1 inj	Daily	Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Silver oxide cream 1%	1ml	Daily	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Frusemide 40mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Reason for Visit

Diagnosis

Preview

Cancel

Automatic **de-selection** of items for inclusion in the shared health summary:

1. The item has a 'share to My Health Record' flag set to 'no' (if applicable); OR
2. The item was not included in the previous shared health summary.

Note: The user is able to select the items for inclusion in the shared health summary.

SHS.06 (Conditional); SHS.08 (Mandatory); SHS.21 (Mandatory)

Select Patient

Shared Health Summary – SMITH, Robert

SMIT

Home Address
Home Phone
Work Phone
Mobile

Notes

Past Medical Hx

Medicines

Investigations

Immunisation

Correspondence

Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>				Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Items are listed in reverse chronological order based on Date field. Items without a date are displayed at the top of the list.
SHS.15 (Mandatory)

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Preview Cancel

Psychiatric
Previous Progress Notes

Reason for Visit Diagnosis Management Reminder

Close

2. Attesting a shared health summary

Select Patient

Shared Health Summary – SMITH, Robert

- SMIT
- Home Address
- Home Phone
- Work Phone
- Mobile
- Notes
- Past Medical Hx
- Medicines
- Investigations
- Immunisation
- Correspondence
- Social History

Medical History

Add	Diagnosis/Procedure	Onset Date
<input checked="" type="checkbox"/>	Diabetes Mellitus Type 1	
<input checked="" type="checkbox"/>	Infection of foot associated with Diabetes Mellitus Type 1	22-Mar-2014
<input checked="" type="checkbox"/>	Wound Debridement	22-Mar-2014
<input type="checkbox"/>	Hypertension	15-Feb-2013
<input checked="" type="checkbox"/>	Hypertension	20-Jan-2013
<input checked="" type="checkbox"/>	Peripheral Neuropathy	15-Oct-2012
<input checked="" type="checkbox"/>	Right heart catheterisation	25-Jan-2010

Medications

Add	Drug	Dosage	Duration	Clinical Indication
<input checked="" type="checkbox"/>	Erythromycin ethyl succinate 400mg	1 tablet	Twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Novorapid inj 100/1ml	1 inj	Daily	Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Silver oxide cream 1%	1ml	Daily	Infection of foot in Diabetes Mellitus Type 1
<input checked="" type="checkbox"/>	Frusemide 40mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Atenolol 200mg	1 tablet	Daily	Hypertension
<input checked="" type="checkbox"/>	Lyrica 75mg	1 tablet	Twice daily	Peripheral Neuropathy

Allergies/Adverse Reactions

Add	Item	Reaction	Onset	Severity
<input checked="" type="checkbox"/>	Penicillin	Rash	1997	Severe
<input checked="" type="checkbox"/>	Ibuprofen	Urticaria	2000	Mild

Immunisation

Add	Vaccine	Date	Sequence Number
<input checked="" type="checkbox"/>	None Known		

Doctor selects Preview

Reason for Visit Diagnosis Management Reminder Psychiatric Previous Progress Notes Close

Shared Health Summary

PATIENT: SMITH, Robert (Mr) DOB 12-Dec-1967 (46y) SEX Male IHI 1111 2222 3333 4444

START OF DOCUMENT

PATIENT DETAILS

Name Mr Robert Smith
Sex Male
Date of Birth 12-Dec-1967 (46y)
IHI 8003614455667788
Address
Home Address:
 111/222 ABC Street, Sydney
 NSW 2000
Contact
Phone:
 0404123456 (mobile)

City Health Medical Practice

Document Type Shared Health Summary
Creation Date/Time 05-Jun-2014 12:12
Date/Time attested 05-Jun-2014 12:12
Document ID 15161800
Completion Code Final
Author Dr Roger Harris (General Medical Practitioner)
 (HPI-I: 8003612033304440)
Author Organisation City Health Medical Practice
 (HPI-O: 80036266077708880)
Author Department City Health Medical Practice

Adverse Reactions

Adverse Reactions

Agent	Adverse Reactions
Penicillin	• Rash
Ibuprofen	• Urticarial

Medications

Medications

Medicine	Dose	Reason
Erythmycin ethyl succinate 400mg	1 tablet twice daily for 2 weeks	Infection of foot in Diabetes Mellitus Type 1
Novorapid inj 100/1ml	1 inj daily	Diabetes Mellitus Type 1
Silver oxide cream 1%	1ml daily	Infection of foot in Diabetes Mellitus Type 1
Frusemide 40mg	1 tablet daily	Hypertension
Atenolol 200mg	1 tablet daily	Hypertension
Lyrica 75 mg		Pain

Medical History

Medical History - Procedures

Date of Onset	Procedure
22-Mar-2014	Intercourse
20-Jan-2013	From Right heart catheterisation (25 Jan 2010)

The acknowledgement statement is prominently displayed
SHS.01 (Mandatory)

Single explicit confirmation by clicking on Upload button.
 Note: A generic keystroke i.e. pressing Enter is liable to be automatically pressed by the user and would not count as an explicit confirmation.
SHS.02 (Mandatory); SHS.03 (Mandatory)

I am the patient's nominated healthcare provider in accordance with the *Personally Controlled Electronic Health Records Act 2012*.
 I am providing ongoing care to this patient.
 I have prepared this Shared Health Summary in consultation with the patient.

Back Print Cancel **Upload**

- Select Patient
- SMITH
- Home Address
- Home Phone
- Work Phone
- Mobile
- Notes
- Past Medical Hx
- Medicines
- Investigations
- Immunisation
- Correspondence
- Social History

- Log out
- Help
- Record
- documents
- pr-2014)
- h, 15-Sep-2014
- Observations /
- mination
- General
- Cardiovascular
- Gastrointestinal
- Respiratory
- Psychiatric
- Previous Progress
- Notes
- Close

Name	Version Release Date
Clinical Document – PCEHR Usability Recommendations v1.2 [NEHTA-1923:2014]	31-Dec-2014
Shared Health Summary – PCEHR Usability Recommendations v1.2 [NEHTA-1922:2014]	31-Dec-2014
Event Summary – PCEHR Usability Recommendations v1.1 [NEHTA-1921:2014]	31-Dec-2014