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EXTENSIA

RecordConnect

Clinical Desktop Integration

Installation and User Guide

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1 Overview

This user guide is intended to provide the reader with the knowledge necessary to install and use RecordConnect. RecordConnect is the interface between RecordPoint and the following 3rd party clinical applications:

- Medical Director
- Best Practice
- practiX
- Stat Health
- Communicare
- Zedmed

RecordConnect includes the ability to:

- Register New Patients
- Link to Existing Patients
- View Shared Health Records
- Upload clinical data to Shared Health Records

The main sections in this document are:

Installation	Includes installing the RecordConnect software.
Configuration	Includes configuring the RecordConnect software for use with local clinical applications and RecordPoint.
Usage	Includes Registering and Linking Patients, viewing their Shared Health Records, and uploading Event Summaries.

RecordConnect is designed to make it easy for Health Care Professionals using their favourite local clinical application to interact with a Shared Health Record community. Primarily the user will be interacting with their chosen clinical application to provide care to patients. The RecordConnect interface automatically monitors activity to assist the user to link patient records, share demographics, and share clinical data between the local record and the shared record, namely RecordPoint.

See the **Shared EHR Clinical User Guide** for an overview of the Shared Health Record concept and use of RecordPoint.

1.1 User Guide Map

The following diagram maps which RecordPoint and RecordConnect User guides are applicable for different users undertaking different activities. For example a GP wishing to access the Shared Health Record via their local system would use the RecordConnect Installation and Configuration User Guide.

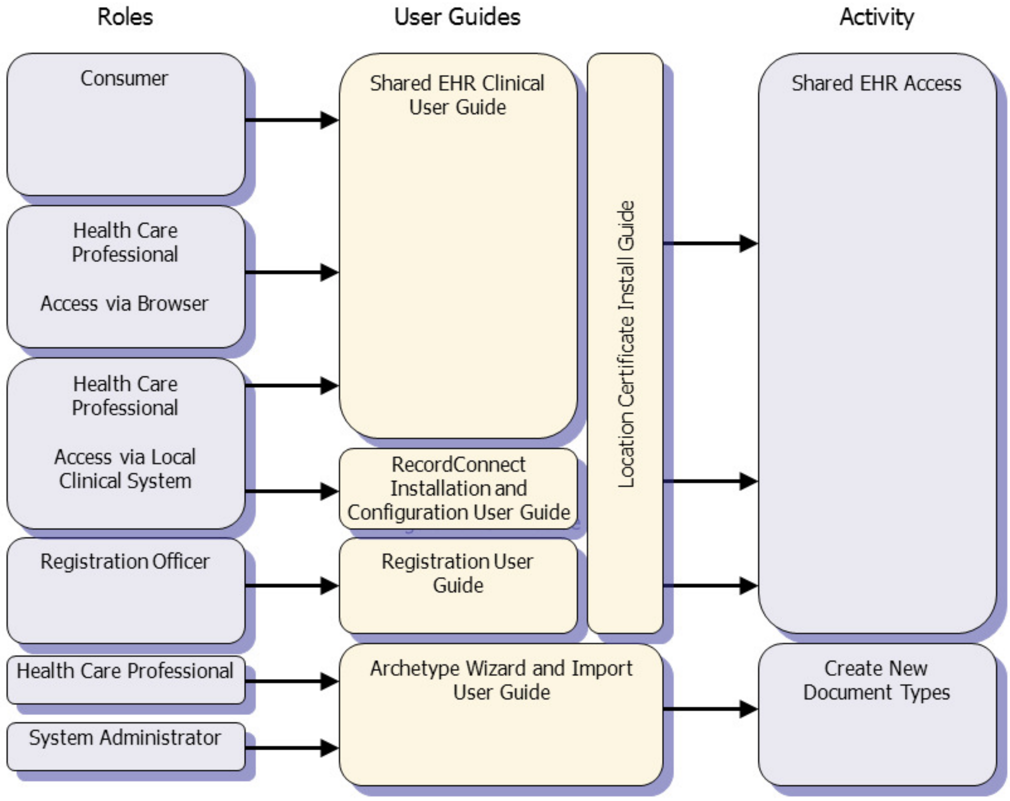

Figure 1 – User Guide Map

1.2 Instructions Used in this Guide

Within this user guide, text in bold computer lettering relates to keys on the keyboard, for example, 'Press **↵ENTER**'. Text in the bold, italic, verdana font face refers to text found within the application and is generally highlighted with a red circle on the screen shots, for example, click on the ***Test Connection*** button.

2 Installation

2.1 System Requirements

The RecordConnect software is currently supported on Microsoft Windows XP, 7, 8 and 10 with .Net Framework 4.0 or above.

The optional RecordPoint module requires a Medicare Australia Location certificate for authentication purposes. RecordConnect needs to be configured with the Agent's authentication credentials, including the Medicare Australia Location certificate to allow it to access the Shared Health Record.

2.2 Installation

RecordConnect supports user specific preferences and is therefore installed and configured for each user.

It is recommended that RecordConnect is installed via the internet to ensure that the latest version is installed and that software updates can be automatically distributed to keep each install up-to-date.

The following steps will install the RecordConnect software:

1. Log in to Windows using the account which is used to run the local clinical application, for example Best Practice. If multiple accounts are used, RecordConnect must be installed in each account.
2. Use a browser and access the RecordConnect download address provided with the RecordPoint service.
3. If asked to run the `setup.exe` program, respond to allow the program to run. For example, click the ***Run*** button as shown in Figure 2.

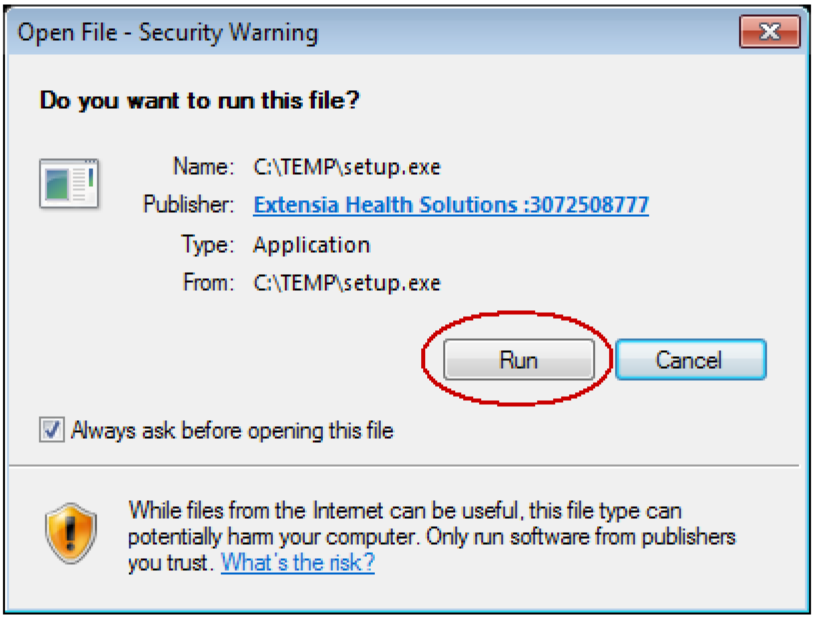

Figure 2: Install – Example Run Prompt

Note: Some browsers may only allow the `setup.exe` program to be downloaded locally, others may automatically open it, and others may allow the user to select either option. Either option is ok as long as the `setup.exe` program is eventually run. If the download option is the only option available, take note of the location where it is locally stored and run it manually.

4. The window shown in Figure 3 may appear temporarily as the installer prepares to install RecordConnect.

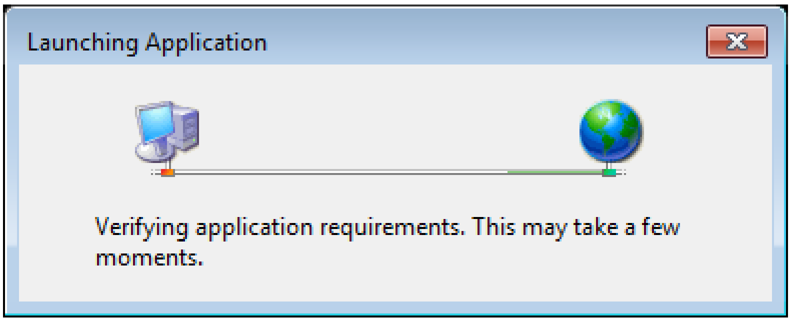

Figure 3: Install – Preparation

5. When asked to install RecordConnect, respond to allow the install to proceed. For example, click the ***Install*** button as shown in Figure 4.

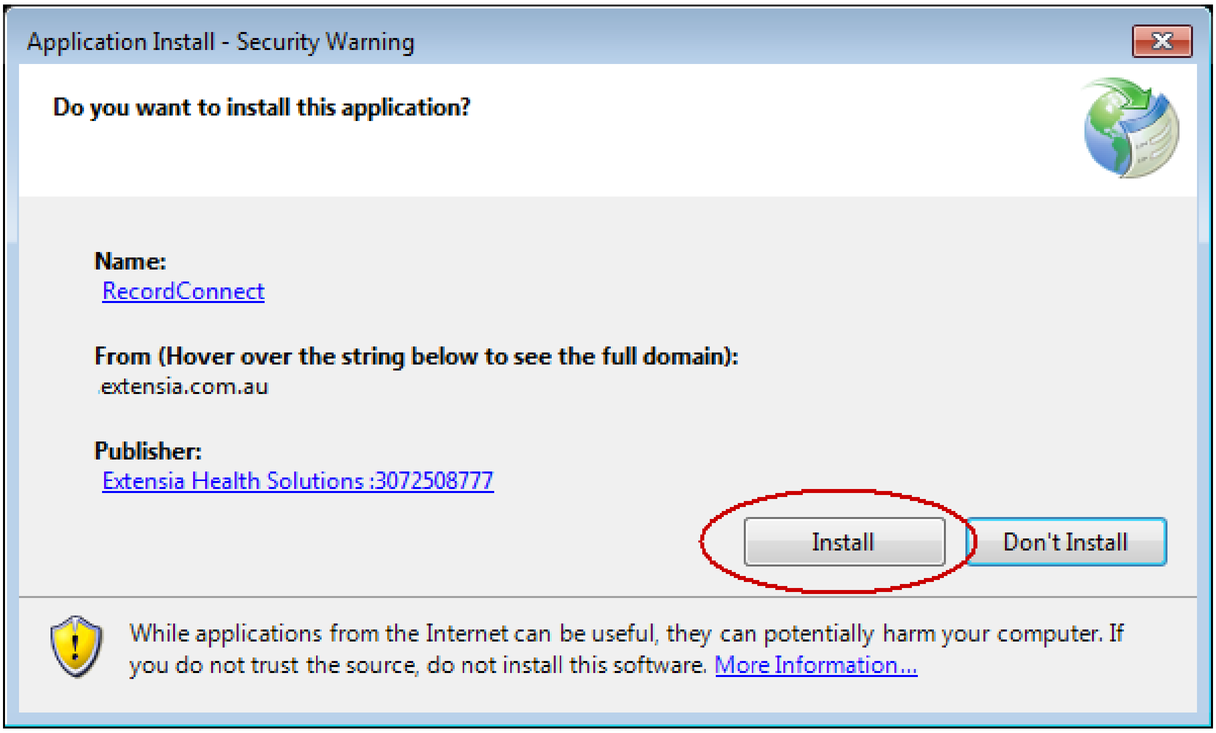

Figure 4: Install – Example Install Prompt

6. The download progress window, as shown in Figure 5, will be displayed.

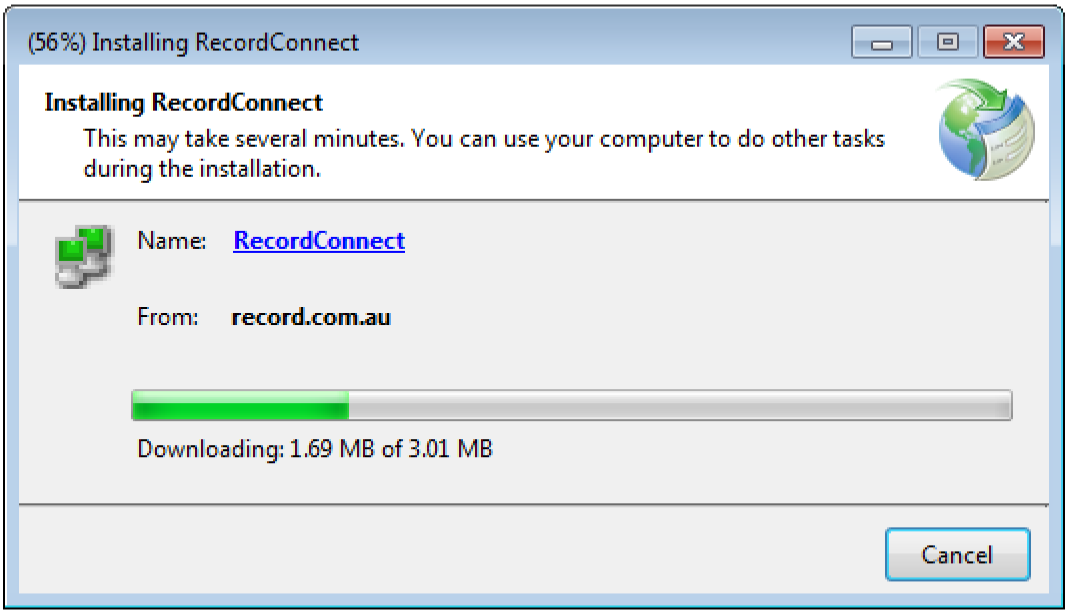

Figure 5: Install – Download Progress

7. Once the download has successfully completed, RecordConnect will be automatically installed into the local Windows account and started for the first time.
8. RecordConnect will automatically open the settings window so the initial configuration can be completed. See section 3 for details on the RecordConnect configuration.

9. A menu item entry, called ***RecordConnect***, will be added to the Windows ***Start*** menu under the ***Programs -> Extensia*** submenu. This can be used to start RecordConnect as needed.
10. To set the RecordConnect application to be auto-started when the user logs in, change the auto start user preference under settings. See section 3.4 for details on setting user preferences.
11. After RecordConnect is started, an icon will be displayed in the Windows icon tray as shown in Figure 6.

Figure 6: Install – RecordConnect Tray Icon

12. Windows will automatically hide this icon when not in use. It is important to set this icon to always be visible. Once the icon has been hidden by windows, drag it back into the icon tray as shown in Figure 7.

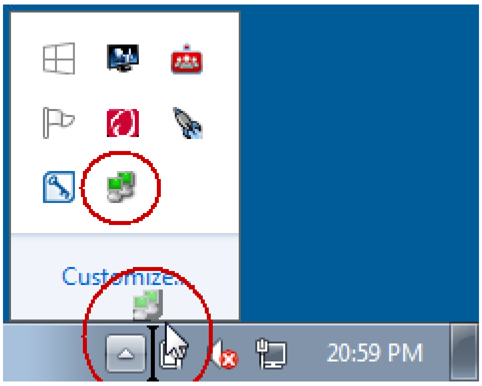

Figure 7: Install – Set Icon Always Visible

To show the hidden icons, click the up arrow to the left of the icons in the icon tray. Grab the RecordConnect icon as shown and drag it onto the visible icon tray. It will be positioned where the black vertical bar is shown. Release the mouse button when the desired position is indicated.

2.3 Automatic Updates

Each time RecordConnect is started it will check to see if an update is available. The window shown in Figure 8 may appear temporarily as RecordConnect checks to see if a newer version is available.

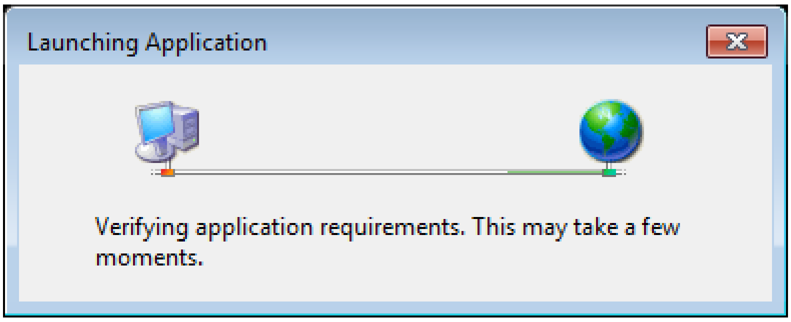

Figure 8: Update – Check for newer versions

If there is an update available, a prompt, as shown in Figure 9, will be displayed.

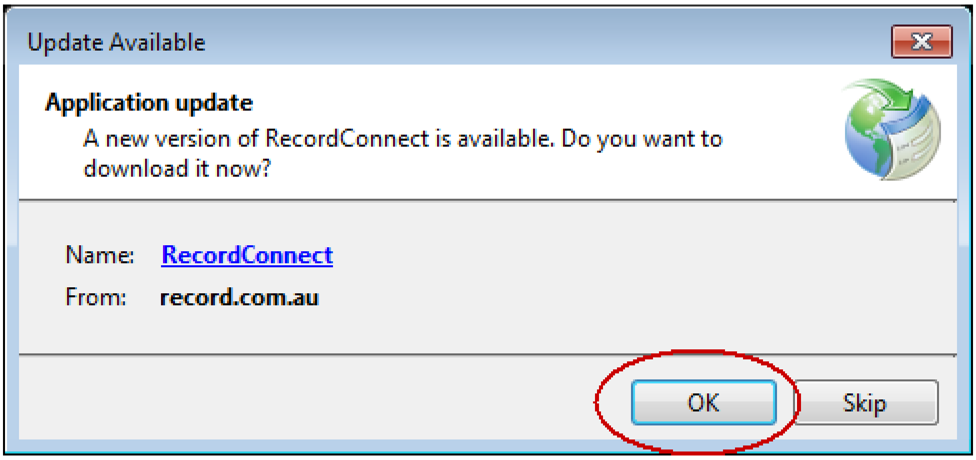

Figure 9: Update – Automatic Update Prompt

Click the ***OK*** button to download and install the new update. Click the ***Skip*** button to ignore the update and start the currently installed version of RecordConnect.

The download progress window, as shown in Figure 10, will be displayed.

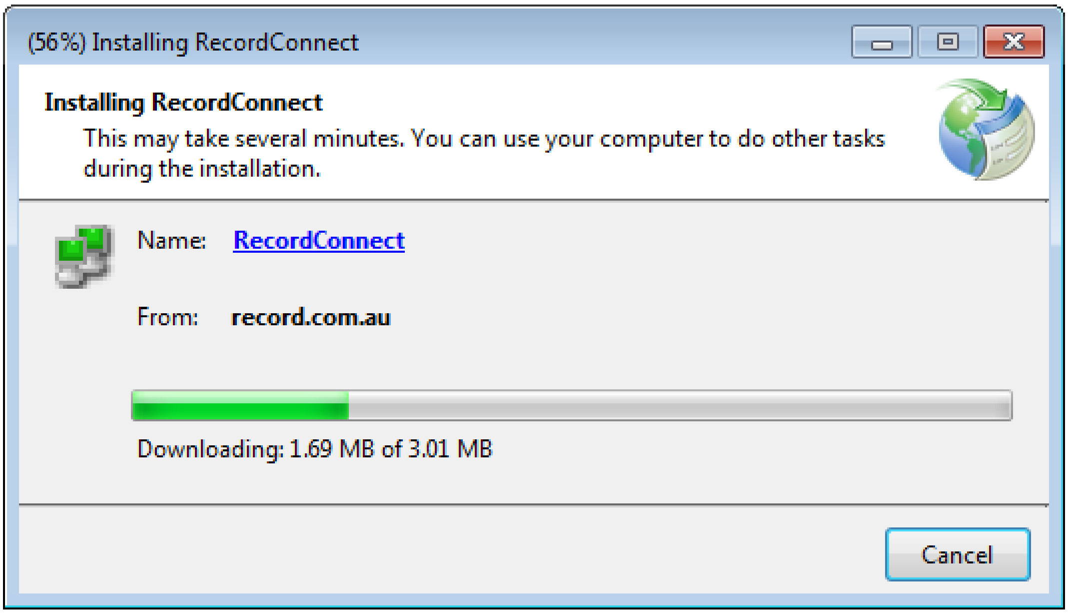

Figure 10: Update – Download Progress

Once the download has successfully completed, the new version will be automatically installed and the updated version of RecordConnect will be automatically started ready for use.

3 Configuration

Configuration is done while RecordConnect is started. See section 4 for details on starting RecordConnect. The ***Settings*** window contains the configuration and preference settings, as shown in Figure 11.

To open the ***Settings*** window, right-click on the tray icon, and click on the ***Settings*** menu item in the context menu. See Section 4.2 for more details on opening the RecordConnect context menu.

3.1 Local EHR Tab

The ***Local EHR*** tab contains a segment, as shown in Figure 11, for configuring the interface with the Local Clinical System.

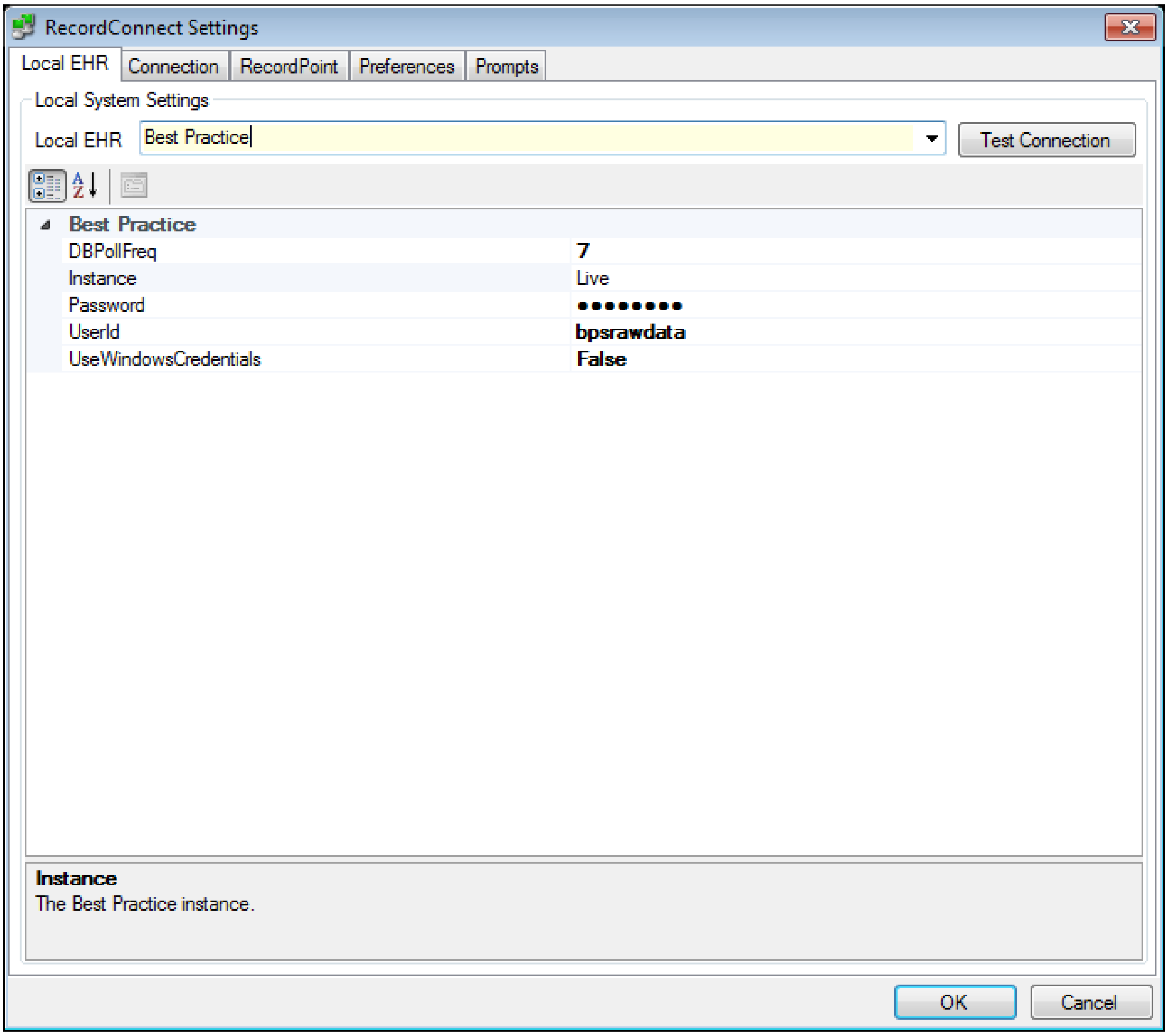

Figure 11: Settings – Local EHR tab

3.1.1 Local System Settings

This segment configures how RecordConnect will connect to the Local Clinical System. The values in this segment change based on the Local Clinical System selected and are specific to that Local Clinical System.

At the time of writing this document, the following values were supported for the ***Local EHR*** field:

- ***Medical Director V3***
- ***Best Practice***
- ***Practix V1***
- ***Stat Health***
- ***Communicare***
- ***Zedmed***

Once the Local Clinical System in use on the workstation has been selected, the segment will change to display the system specific values.

For ***Medical Director V3***, enter the values for the following fields in this segment:

- ***Configuration Name*** - The name of the Medical Director configuration that RecordConnect should use. This should normally be left as “HCN Live Data”. For testing, “HCN Sample Data” may also be available.
- ***ConsultCheckDelay*** – Specifies the delay in milliseconds for RecordConnect to wait before checking the consult for an opened patient. This should only be lengthened if RecordConnect is selecting an incorrect provider. The longer it is set, the longer it will take for RecordConnect to identify the provider. This setting only affects users without a provider number.
- ***ConsultCurrency*** – Specifies the age in minutes for a consult to be used to identify the provider. This should only be shortened if old consults are causing an incorrect provider to be selected by RecordConnect. If it is set too short then RecordConnect will not be able to detect the correct provider. This setting only affects users without a provider number.
- ***Password*** – This field is only applicable if ***UseWindowsCredentials*** is false. This field is the password that will be used to connect to the Medical Director V3 database. This will need to be provided by the administrator of the Medical Director V3 server.
- ***UserId*** - This field is only applicable if ***UseWindowsCredentials*** is false. This field is the user identifier that will be used to connect to the Medical Director V3 database. This will need to be provided by the administrator of the Medical Director V3 server.
- ***UseWindowsCredentials*** – Specifies if the windows login is used to access the Medical Director V3 database. This should normally be left as ***True***. If ***False*** is selected, the credentials must be manually specified via the ***UserId*** and ***Password*** fields above. These will need to be provided by the administrator of the Medical Director V3 server.

For ***Best Practice***, enter the values for the following fields in this segment:

- ***DBPollFreq*** – This field defines how frequently polling checks directly access the database. The more frequently the database is accessed, the more computer resources

RecordConnect will consume. The less frequently the database is accessed, the less responsive RecordConnect will be in detecting changes. This field should be left as the default unless otherwise instructed by support.

- ***Instance*** - The name of the Best Practice database instance that RecordConnect should use. This should normally be left as "Live". For testing, "Sample" may also be available.
- ***Password*** – This field is only applicable if ***UseWindowsCredentials*** is false. This field is the password that will be used to connect to the Best Practice database. This will need to be provided by the administrator of the Best Practice server. It is strongly recommended by Best Practice support that the "bpsrawdata" user account is used. The password for this account is the same as for the "bpsbrowser" user account.
- ***UserId*** - This field is only applicable if ***UseWindowsCredentials*** is false. This field is the user identifier that will be used to connect to the Best Practice database. This field should be left as its default value. It is strongly recommended by Best Practice support that the "bpsrawdata" user account is used.
- ***UseWindowsCredentials*** – Specifies if the windows login be used to access the Best Practice database. This should normally be left as ***False***. If ***True*** is selected, the ***UserId*** and ***Password*** fields are ignored. It is strongly recommended by Best Practice support that this field is left as ***False*** and the "bpsrawdata" user account is used.

For ***Communicare***, enter the values for the following fields in this segment:

- ***ConnectionString*** – The connection string to use for connecting to the Communicare database. If the default connection string is not suitable for local environments, it may be overridden by this field. This field should be left as the default (blank) unless otherwise instructed by support.
- ***DBPollFreq*** – This field defines how frequently polling checks directly access the database. The more frequently the database is accessed, the more computer resources RecordConnect will consume. The less frequently the database is accessed, the less responsive RecordConnect will be in detecting changes. This field should be left as the default unless otherwise instructed by support.
- ***InstallPath*** - The absolute directory path of the local Communicare client install. This field should be left as the default unless otherwise instructed by support.
- ***Password*** – This field is the password that will be used to connect to the Communicare database. Any standard Doctor or Administrator user login credentials can be used here.
- ***UserId*** - This field is the user identifier that will be used to connect to the Communicare database. Any standard Doctor or Administrator user login credentials can be used here.

For ***Practix V1***, enter the values for the following fields in this segment:

- ***DataSourceName*** - The name of the data source used to connect to the Practix V1 database. The pull down list provides a list of the available options on the network connected to the workstation. If a candidate is not an obvious choice, this name will need to be provided by the administrator of the Practix V1 server.

  Note: it may take a while for the pull down list to appear while the network is being searched.

- ***DocumentLocation*** – Specifies the absolute path of the directory containing the practiX Outgoing Document files. This will commonly be a network location.
- ***DocumentPassword*** – Specifies the password used to unzip the practiX Outgoing Document files. This is a local practice specific password.
- ***Password*** – This field is only applicable if ***UseWindowsCredentials*** is false. This field is the password that will be used to connect to the Practix V1 database. This will need to be provided by the administrator of the Practix V1 server.
- ***TreeNodesDocuments*** – Specifies a comma separated list of tree node identifiers that represent Incoming Documents for this site. A verbose trace of a Test Connection to Practix will log the available tree nodes.
- ***TreeNodesPathology*** – Specifies a comma separated list of tree node identifiers that represent Pathology reports for this site. A verbose trace of a Test Connection to Practix will log the available tree nodes.
- ***UserId*** - This field is only applicable if ***UseWindowsCredentials*** is false. This field is the user identifier that will be used to connect to the Practix V1 database. This will need to be provided by the administrator of the Practix V1 server.
- ***UseWindowsCredentials*** – Specifies if the windows login is used to access the Practix V1 database. This should normally be left as ***True***. If ***False*** is selected, the credentials must be manually specified via the ***UserId*** and ***Password*** fields above. These will need to be provided by the administrator of the Practix V1 server.

For ***Stat Health***, enter the value for the following field in this segment:

- ***StatHealthDll*** - The location of the library that manages the connection to the StatHealth database. This value should not need to be changed, unless the default install location of the StatHealth application was changed. In this case, browse the workstation for the correct location of the ***GpxStat.dll*** file.

For ***Zedmed***, enter the values for the following fields in this segment:

- ***ZedmedDBPathClinical*** - The fully qualified address of the Zedmed Clinical Database. The default value is simply an example and is unlikely to be the correct value required. This will need to be provided by the administrator of the Zedmed server.
- ***ZedmedDBPathICPC*** - The fully qualified address of the Zedmed ICPC Database. The default value is simply an example and is unlikely to be the correct value required. This will need to be provided by the administrator of the Zedmed server.
- ***ZedmedDBPathMIMS*** - The fully qualified address of the Zedmed MIMS Database. The default value is simply an example and is unlikely to be the correct value required. This will need to be provided by the administrator of the Zedmed server.
- ***ZedmedDBPathOffice*** - The fully qualified address of the Zedmed Office Database. The default value is simply an example and is unlikely to be the correct value required. This will need to be provided by the administrator of the Zedmed server.
- ***ZedmedDll*** - The location of the library that manages the connection to the Zedmed database. This value should not need to be changed, unless the default install location of the Zedmed application was changed. In this case, browse the workstation for the correct location of the ***GpxZedmed.dll*** file.
- ***ZedmedINIPath*** - The location of the directory that contains the Zedmed ini files. This value should not need to be changed, unless the default install location of the

Zedmed application was changed. In this case, browse the workstation for the correct location of the Zedmed ini files.

- ***ZedmedPassword*** – This field is the password that will be used to connect to the Zedmed database. This will need to be provided by the administrator of the Zedmed server.
- ***ZedmedUserId*** - This field is the user identifier that will be used to connect to the Zedmed database. This will need to be provided by the administrator of the Zedmed server.

After the values in the ***Local System Settings*** segment have been entered, click the ***Test Connection*** button to verify if RecordConnect can interface successfully with the Local Clinical System.

3.2 Connection Tab

The ***Connection*** tab contains a segment, as shown in Figure 12, for configuring access to the internet.

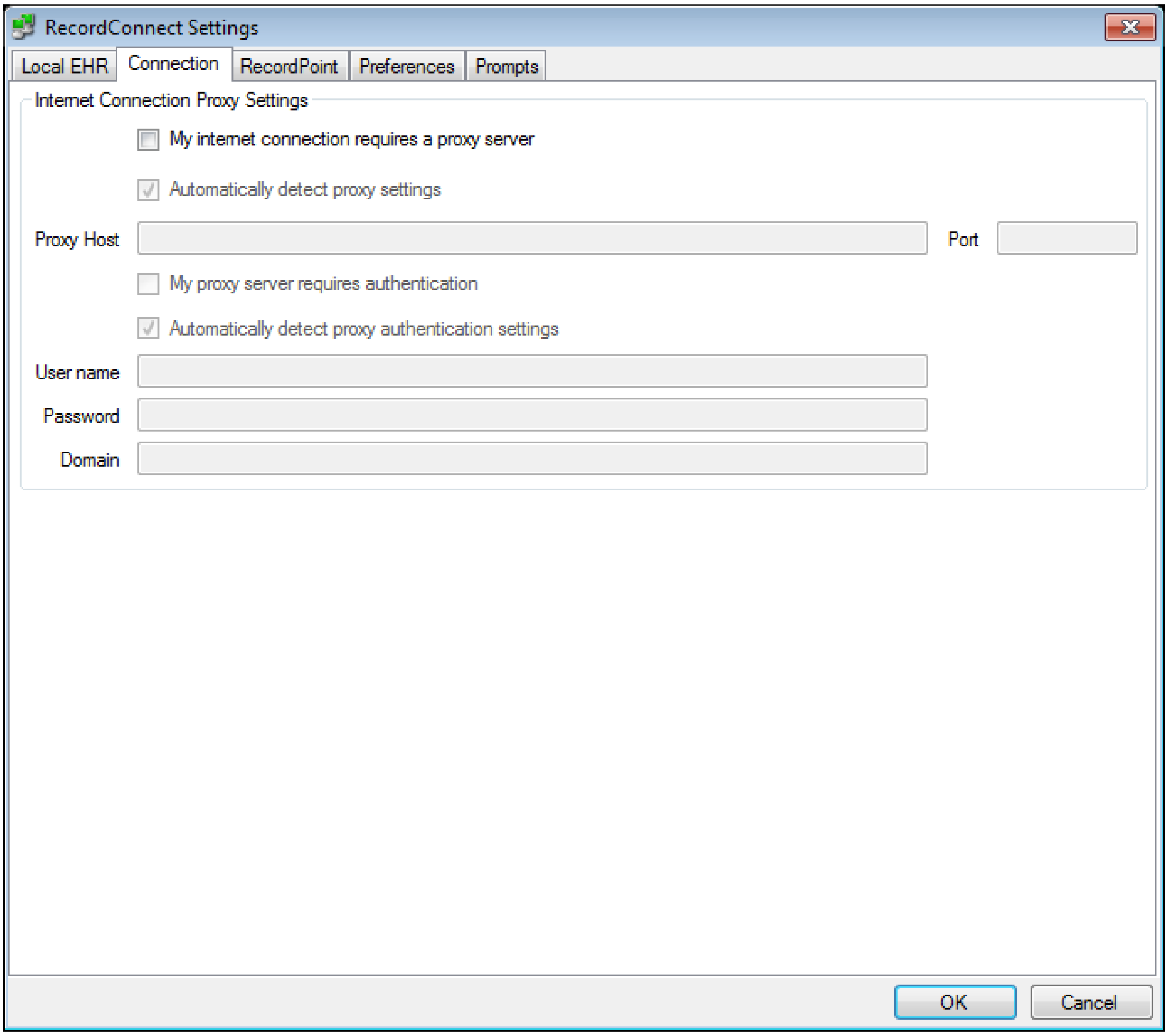

Figure 12: Settings - Connection tab

3.2.1 Internet Connection Proxy Settings

Internet proxies are normally only used in larger organisations and networks, for example in hospitals. For smaller organisations, for example a GP practice, a proxy will not normally be in use.

The administrator of the network will be able to provide the proxy settings if required.

Enter the values provided by the network administrator for the following fields in this segment:

- ***My internet connection requires a proxy server*** – Check this box if a proxy server used to connect to the internet?

- ***Automatically detect proxy settings*** – Check this box if the default proxy settings for the current workstation login should be used.
- ***Proxy Host/Port*** – If the required settings are different from the default settings, enter the required host name and port of the proxy server.
- ***My proxy server requires authentication*** – Check this box if the proxy server requires authentication.
- ***Automatically detect proxy authentication settings*** – Check this box if the default proxy authentication settings for the current workstation login should be used.

  If the required settings are different from the default settings automatically detected, uncheck this option and enter the required username, password and domain in the following fields.

- ***User name*** - Enter the required user name for authentication with the proxy server.
- ***Password*** - Enter the required password for authentication with the proxy server.
- ***Domain*** - Enter the required domain for authentication with the proxy server.

3.3 RecordPoint Tab

The ***RecordPoint*** tab contains a top section and 3 sub-tabs, as shown in Figure 13, for configuring the interface with the RecordPoint Shared Health Record server.

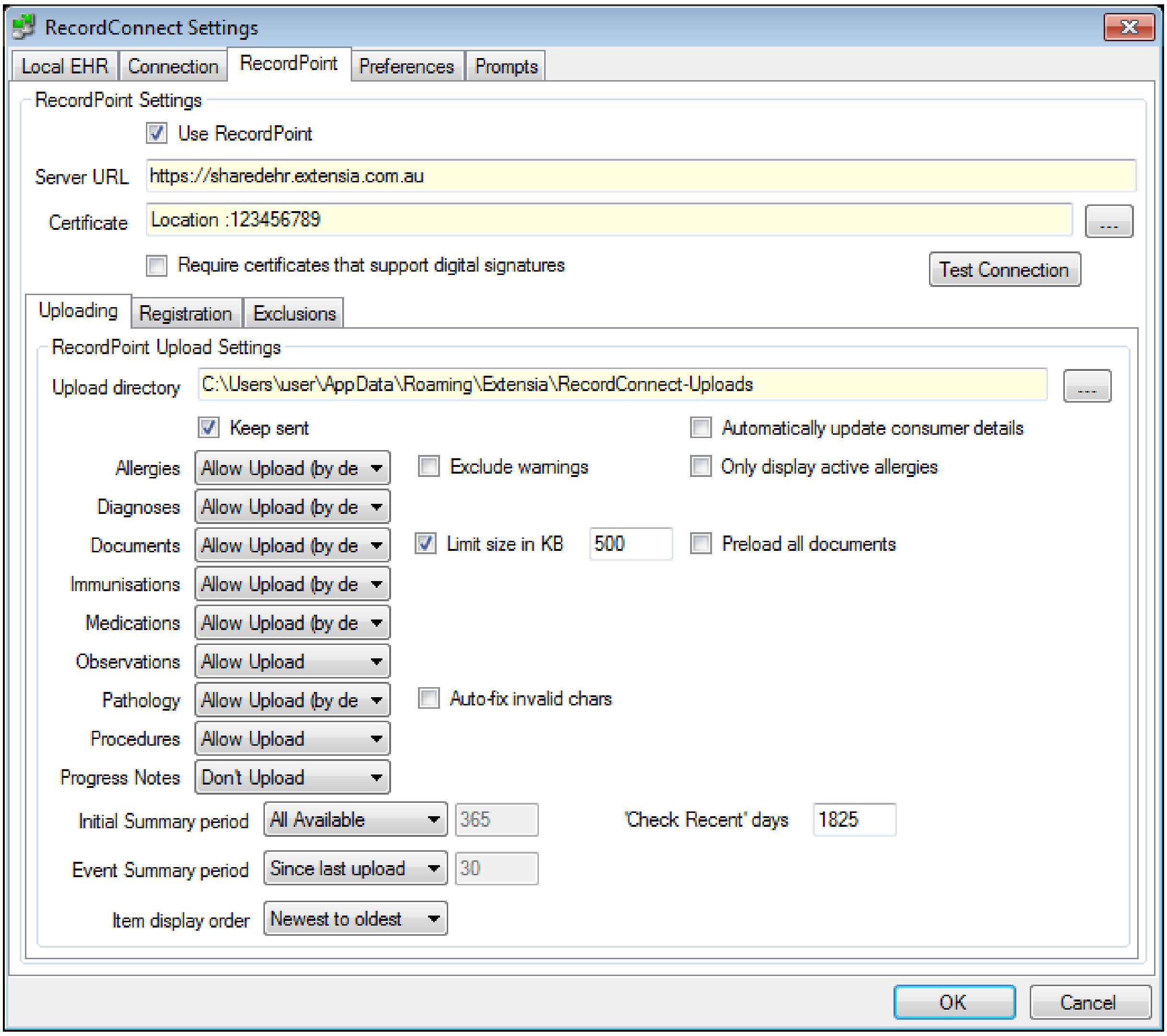

Figure 13: Settings – RecordPoint tab, Uploading sub-tab

3.3.1 RecordPoint Settings

Enter the values for the following fields in this segment:

- ***Use RecordPoint*** – Check this box if a connection to the RecordPoint shared health record is required for this workstation.
- ***Server URL*** - The internet address of the RecordPoint server. If RecordConnect has been installed over the internet, this URL will normally be defaulted to the correct value. Otherwise this value will be provided by the provider of the RecordPoint service.

Notes:

- The URL must use the “https” (secured HTTP) protocol as a mutually-authenticated SSL/TLS encrypted connection is used to communicate with the server.
- Do not append a forward slash “/” at the end of the URL.

- ***Certificate*** - The name of the Medicare Australia location certificate for the practice. This PKI certificate must be installed before it can be chosen. The pull down list will show the available certificates installed on the workstation. See the **Location Certificate Install Guide** for directions on installing PKI certificates.
- ***Require certificate support for digital signatures*** - Check this box if multiple certificates of the same name appear. This will filter the list to show the required certificate. This can normally be left unchecked.

After the values in the ***RecordPoint Settings*** segment have been entered, click the ***Test Connection*** button to verify if RecordConnect can connect successfully with the RecordPoint server.

3.3.2 Uploading Sub-Tab

The ***Uploading*** sub-tab contains a segment, as shown in Figure 13, for configuring the defaults and preferences for the data that is uploaded from the Local Clinical System to the RecordPoint shared health record.

Enter the values for the following fields in this segment:

- ***Upload directory*** – The name of the directory where the HL7 messages will be created before being uploaded to the RecordPoint server. Only change the default if local preferences require these files to be stored in another location.
- ***Keep sent*** – Check this box to keep a copy of events that have been successfully uploaded to the RecordPoint server. A copy of successfully uploaded events will be kept as a file, in HL7 format, in the ***success*** sub-directory of the Upload Directory. Events that fail to upload are always kept in the ***failure*** sub-directory.
- ***Automatically update consumer details*** – Check this box to automatically update the patient demographics every time a clinical event is uploaded. Only check this box if the patient demographics stored in the Local Clinical System are more likely to be up-to-date than the patient demographics stored in the RecordPoint shared health record.

RecordConnect can upload Initial Health Summaries, see section 5.7, and Event Summaries, see section 5.8, to the Shared Health Record. Both of these summaries are made up of data from the Local Clinical System according to the following data groups:

- Allergies
- Diagnoses
- Documents
- Immunisations
- Medications
- Observations
- Pathology

- Procedures
- Progress Notes (not available for the Initial Health Summary)

For each data group available for upload to the Shared Health Record, one of the following settings may be selected:

- ***Don't Upload*** – the data in this group will not be available for upload.
- ***Allow Upload*** – the data in this group will be available for upload but must be manually checked to be uploaded.
- ***Allow Upload (by default)*** – the data in this group will be available for upload and will be automatically checked to be uploaded. This may be manually overridden during upload.

Several data group have additional settings that may be selected.

The following settings apply to the ***Allergies*** data group:

- ***Exclude Warnings*** – Check this box to exclude warnings from the upload form. This means only allergies will be available for upload.
- ***Only display active allergies*** – Check this box to exclude inactive allergies from the upload form. This means only active allergies will be available for upload.

The following settings apply to the ***Documents*** data group:

- ***Limit size in KB*** – Check this box to enable the automatic resize of images. The required maximum size in kilobytes is specified to the right of the checkbox label and defaults to 500 kilobytes. Any images over this size will be automatically reduced to less than this size. Not all image formats are supported.
- ***Preload all documents*** – Check this box to preload all documents before displaying the upload form.

  To improve the response of the upload form when all documents are extracted, it will only retrieve the details about the document and not the actual document itself. The document contents can then be manually retrieved by the user on the upload form or any document selected for upload will be automatically retrieved before the upload.

  If this option is selected then the contents of the documents will be initially retrieved even if they are not being uploaded. This can cause significant delay if the patient has a lot of documents.

The following setting applies to the ***Pathology*** data group:

- ***Auto-fix invalid chars*** – Check this box to automatically replace invalid characters in pathology reports and results.

  The upload form will not allow affected pathology to be selected for upload. Otherwise the entire upload would be rejected by the RecordPoint server. Affected pathology can be manually corrected via a right-click menu option on the upload form.

  However, due to the frequency of invalid characters present in pathology reports and results the user may wish to select this option to automatically correct them before the upload form is displayed.

At the bottom of the segment on the ***Uploading*** sub-tab are fields that control the default dates used for extracting data and the sort order of that data. These settings are:

- ***Initial Summary period*** – Select whether all available data is extracted for the Initial Health Summary or whether only data since the specified number of days is extracted. This defines the default period of data that will be displayed on the upload form. The user can override this default after the upload form is displayed to filter a more useful list if required. This setting should match what is likely to be most useful for most patients.
- ***'Check Recent' days*** – Enter the number of days that will apply to the ***Check Recent*** button on the upload form. When the ***Check Recent*** button is pressed, the upload form will select all items that are dated within the previous number of days specified.
- ***Event Summary period*** – Select from one of the following options to define the default period of data that will be extracted for an Event Summary and displayed on the upload form:

    - ***All Available*** – This option will extract and populate all available data on the upload form for an Event Summary.
    - ***Since # of days*** – This option will extract and populate only data since the specified number of days on the upload form for an Event Summary.
    - ***Since last upload*** – This option will extract and populate only data since the date and time of the last upload from this location to the patients Share Health Record. It is expected that this option will be the most useful.

- ***Item display order*** – Select whether the data on the upload form is sorted in ascending or descending order within each data group.

3.3.3 Registration Sub-Tab

The ***Registration*** sub-tab contains a segment, as shown in Figure 14, for configuring the defaults and preferences for the registration of new Patient's in the RecordPoint server.

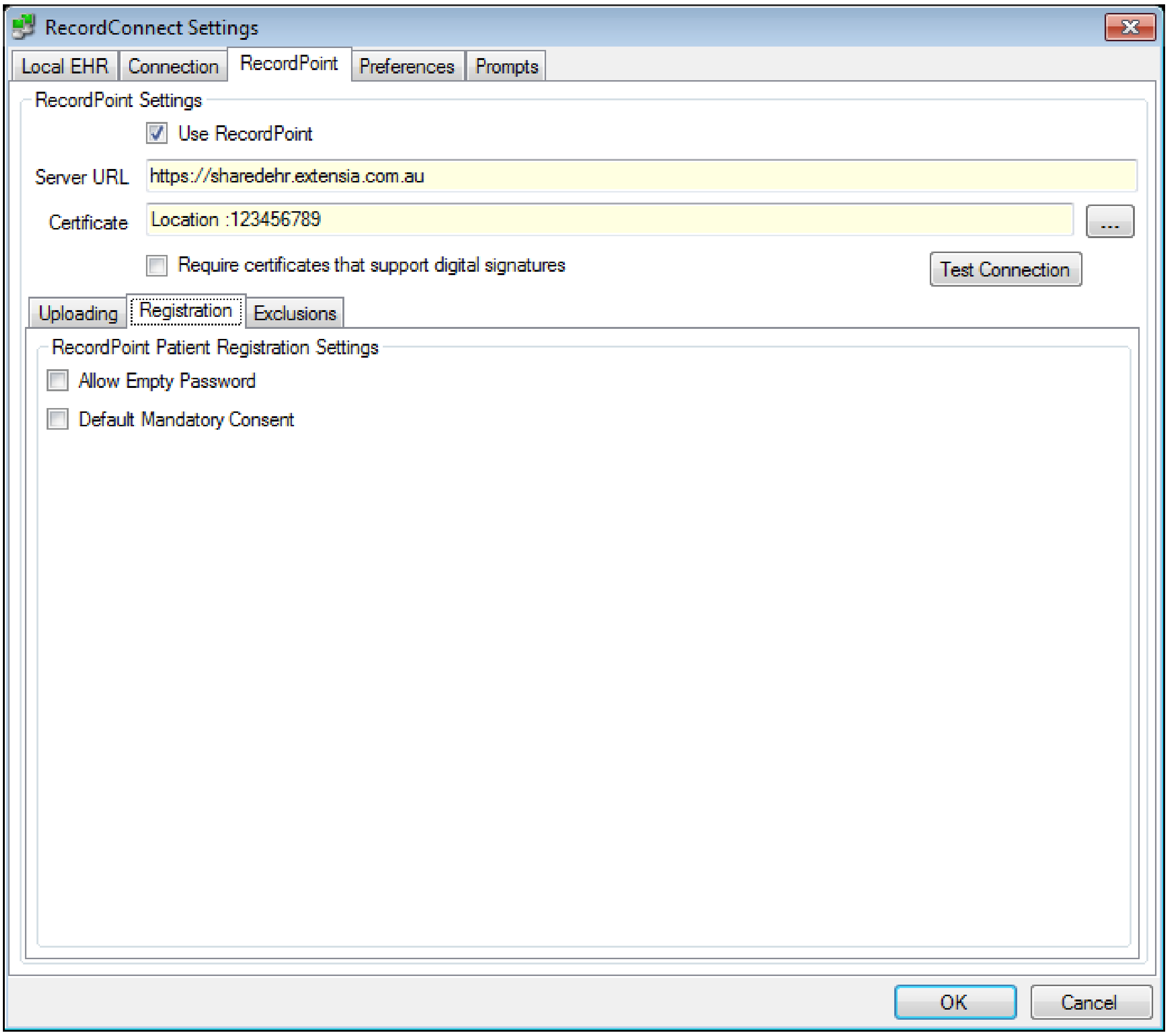

Figure 14: Settings - RecordPoint tab, Registration sub-tab

Enter values for the following fields in this segment:

- ***Allow Empty Password*** – Check this option to allow registration of a patient without assigning an initial password.

  The Patient will be unable to login until an initial password has been assigned. This can be useful for communities that do not allow Patient access to their own Shared Health Record or for registration processes that will assign an initial password at a later time.

- ***Default Mandatory Consent*** – Check this option to automatically check the mandatory consent items on the registration form. The user will still need to provide proof that the patient has provided this consent.

3.3.4 Exclusions Sub-Tab

The ***Exclusions*** sub-tab contains a segment, as shown in Figure 15, for managing the list of Patients that will be ignored by RecordConnect.

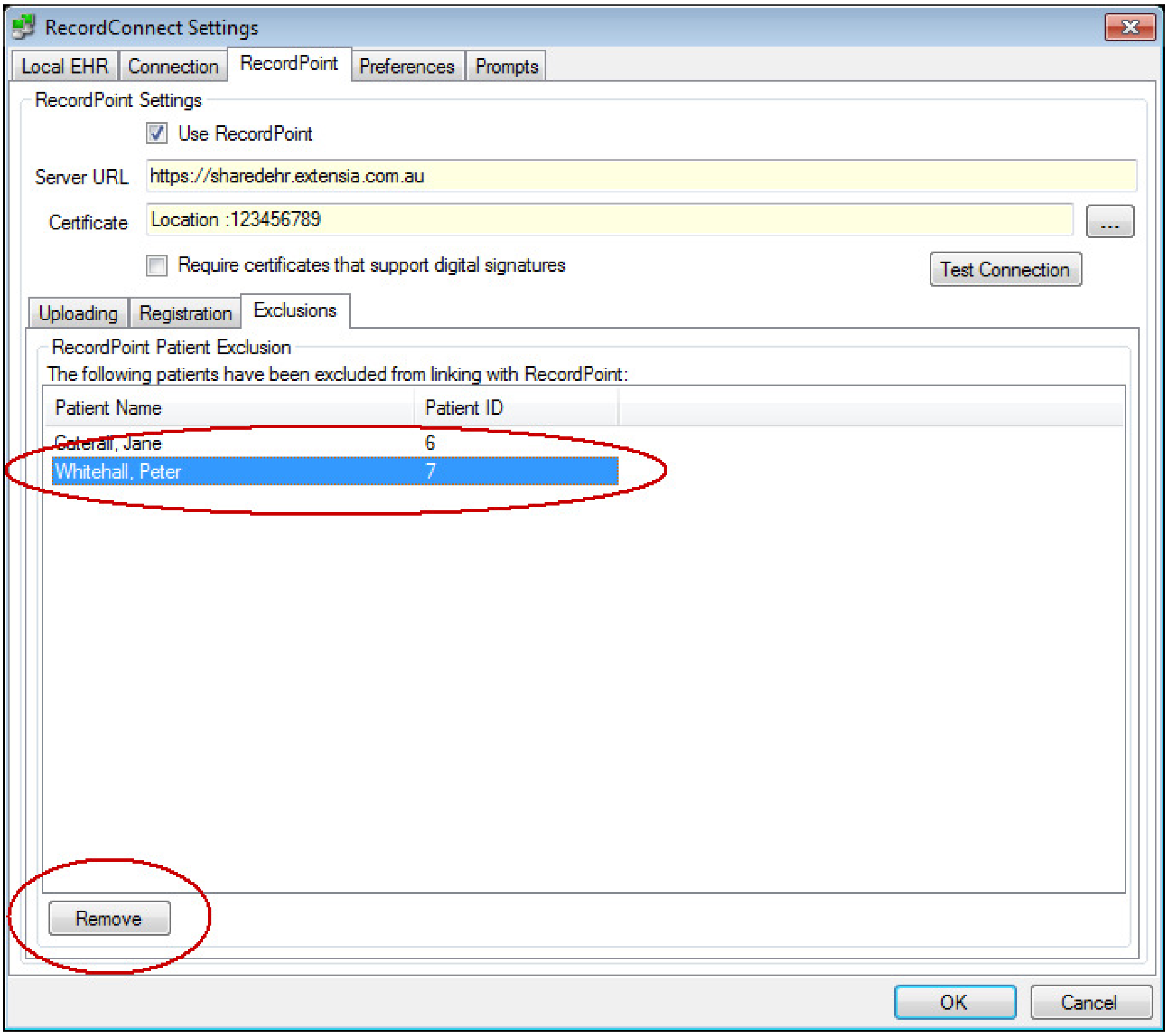

Figure 15: Settings - RecordPoint tab, Exclusions sub-tab

These are the names and patient identifiers of Patients who will be excluded from Shared Health Record processing. The identifiers are taken from the Local Clinical System. RecordConnect will not provide the normal registration prompts for these Patients and their clinical data will not be uploaded to the RecordPoint server. When their record is opened in the Local Clinical System, a balloon will be displayed as a reminder that the patient has been excluded from Shared Health Record processing.

The reasons for excluding Patients is commonly because they have not consented to have a Shared Health Record or they have not consented for the Provider's location to have access to their record. This is simply to remove the normal RecordConnect prompts which may be inappropriate after the Patient has decided to not participate in the Shared Health Record (or no longer wishes to participate).

Any Patient may be marked as excluded, irrespective of whether they have a Shared Health Record or not, or even after they have been linked to this location.

To add the current Patient to this exclusion list, use the ***Exclude Patient*** menu item (see Section 5.5) when it is enabled, or the ***Exclude*** button on the register and/or link patient search screen (see Section 5.2 or 5.3).

To remove a Patient from the exclusion list, select the Patient from the list as shown in Figure 15, and click the ***Remove*** button.

3.4 Preferences Tab

The ***Preferences*** tab contains 4 segments, as shown in Figure 16, for configuring the user preferences for RecordConnect.

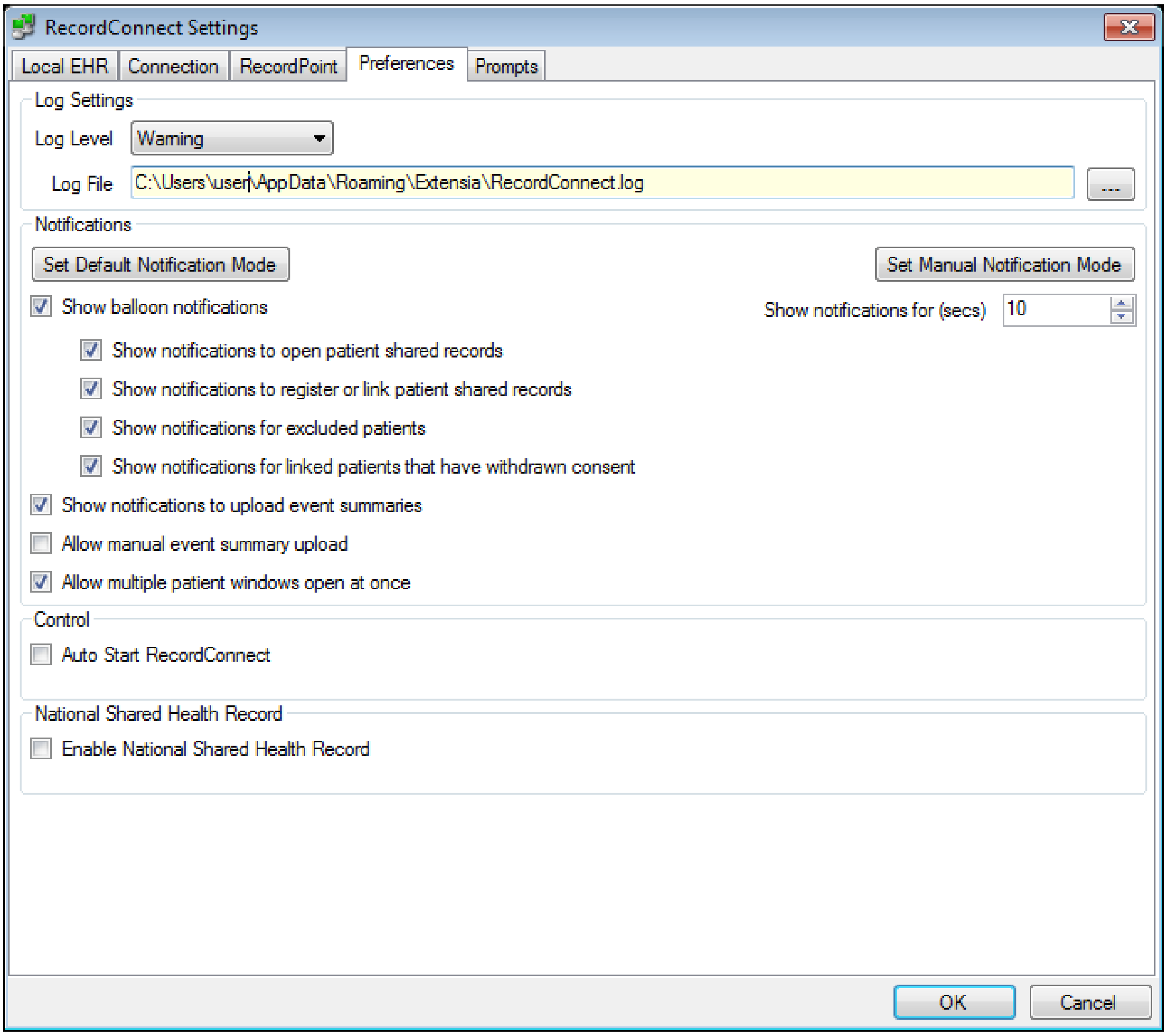

Figure 16: Settings – Preferences tab

3.4.1 Log Settings

Enter the values for the following fields in this segment:

- ***Log Level*** - Defines the quantity of application logging, from ***Verbose*** (most messages) to ***Error*** (least messages). Normally this value should be set to ***Warning***. If disk space is critical, it may be set to ***Error*** instead. It should only be set to ***Info*** or ***Verbose*** for a short period of time for tracing purposes.
- ***Log File*** - The name and location of the log file. Only change the default if local preferences require the log file to be stored in another location.

3.4.2 Notifications

The ***Set Default Notification Mode*** and ***Set Manual Notification Mode*** buttons set the notification preference to preset values.

The ***Set Default Notification Mode*** button presets the preferences to notify the user of all normal notifications. This mode is the normal mode and specifically suited to interacting with the Shared Health Record as each local patient record is opened and closed.

The ***Set Manual Notification Mode*** button presets the preferences to stop notifying the user. This mode is suited to bulk interactions with the Shared Health Record which are not related to consultations, for example uploading Initial Health Summaries for a large number of patients.

Enter the values for the following fields in this segment:

- ***Show balloon notifications*** – While the Local Clinical System is in use, RecordConnect can display balloon tip notifications from the icon tray (normally in the bottom right corner of the screen) to assist with the Shared Health Record functions. Un-checking this check box will disable all of these notifications.
- ***Show notifications for (secs)*** - Specifies the approximate time in seconds that balloon tip notifications will be displayed before automatically being removed.
- ***Show notifications to open patient shared records*** – Check this box to receive a notification when a local patient record is opened and a Shared Health Record is available for viewing.
- ***Show notifications to register or link patient shared records*** – Check this box to receive a notification when a local patient record is opened and a Shared Health Record is **not** available for viewing. The patient may not already have a Shared Health Record or the patient's Shared Health Record has not been previously linked to this location.
- ***Show notifications for excluded patients*** – Check this box to receive a notification when a local patient record is opened and they are on the RecordConnect excluded list.
- ***Show notifications for linked patients that have withdrawn consent*** – Check this box to receive a notification when a local patient record is opened and this location had previously had access to their Shared Health Record, but no longer have access due to the patient withdrawing consent.
- ***Show notifications to upload event summaries*** – Check this box to receive a notification when a local patient record is closed and clinical information is available for upload to the Shared Health Record.
- ***Allow manual event summary upload*** – Check this box to add an option to the context menu so an Event Summary can be trigger manually at any time, ie not just when the local patient record is closed.
- ***Allow multiple patient windows open at once*** – Check this box to improve RecordConnect handling of Patient open and close when multiple windows are open at once. When multiple local patient records are open at the same time it is very difficult for RecordConnect to determine which patient to focus on. This option enables additional processing for supported systems (currently only Best Practice) to manage multiple patient windows.

3.4.3 Control

Enter the value for the following field in this segment:

- ***Auto Start RecordConnect*** – Check this box to automatically start RecordConnect every time the user logs into the workstation. Otherwise RecordConnect must be manually started by the user when required.

3.4.4 National Shared Health Record

Enter the value for the following field in this segment:

- ***Enable National Shared Health Record*** – Check this box to display the option to upload event summaries to the National Shared Health Record system.

  The option will appear on the upload form if the Patient and User have their national identifiers setup in RecordPoint. The user selects the items to upload in the Initial Health Summary or the Event Summary as normal. The event will be uploaded to RecordPoint with the selected items. If the user also selects this option on the upload form, any of those items that are supported by the National Shared Health Record will then be submitted as an Event Summary to the national system.

  This option is only applicable if the RecordPoint server has been setup to upload to the National Shared Record system.

3.5 Prompts Tab

The ***Prompts*** tab contains 5 segments, as shown in Figure 17, for configuring the Prompts module in RecordConnect.

The Prompts module analyses the local patient record and shows prompts to the user to highlight findings and provide links to additional information. The prompt and analysis logic is downloaded, and kept up to date, from a pre-configured server.

The Prompts module is optional and dependent on the service being provided and available. To enquire on the availability of the Prompts module, please contact the organisation who provided access to RecordConnect or Extensia on 07 3292 0222, or enquiries@extensia.com.au.

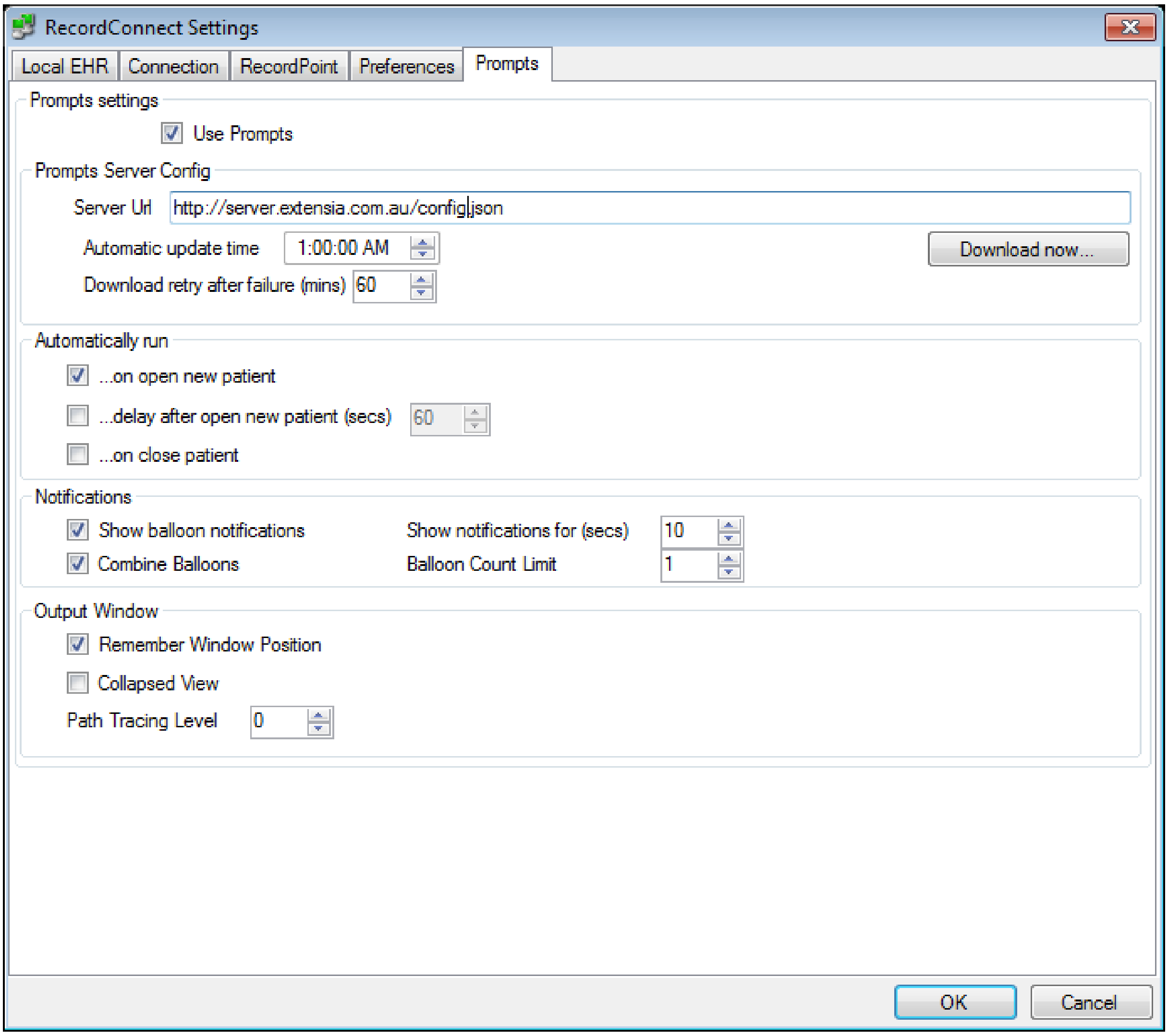

Figure 17: Settings – Preferences tab

3.5.1 Prompts Settings

Select the value for the following field in this segment:

- ***Use Prompts*** – Check this box to use the Prompts module on this workstation.

3.5.2 Prompts Server Config

Enter the values for the following fields in this segment:

- ***Server URL*** - The internet address of the Prompts config file containing the logic to be applied on this workstation. If RecordConnect has been installed over the internet, this URL will normally be defaulted to the correct value. Otherwise this value will be provided by the provider of the Prompts service.
- ***Automatic update time*** – Specifies the time each day that RecordConnect (if left running) will check for an updated config file on the server. RecordConnect will also check for an updated config file each time it is started. Only change the default if local preferences require the file to be checked at an alternative time.
- ***Download retry after failure (mins)*** - Specifies the number of minutes that RecordConnect will wait before retrying an automatic update. If for any reason the check for an updated config file fails at the appointed time, RecordConnect will continue to retry until it is successful. The check is deemed successful if it is determined that this workstation already has the latest config file or the update is successfully downloaded. To disable retries set this value to zero. It is recommended that this field is kept at the default value.

3.5.3 Automatically run

Enter the values for the following fields in this segment:

- ***… on open new patient*** – Check this box to automatically analyse the prompt logic when a local patient record is opened in the Local Clinical System. Otherwise the prompt module will not do anything when the patient is opened.
- ***… delay after open new patient (secs)*** – Check this box to automatically analyse the prompt logic for the specified number of seconds after a local patient record is opened in the Local Clinical System. Otherwise the prompt module will not do anything after the patient is opened.
- ***… on close patient*** – Check this box to automatically analyse the prompt logic when a local patient record is closed in the Local Clinical System. Otherwise the prompt module will not do anything when the patient is closed.

Note: If none of these options are selected then RecordConnect will not automatically analyse the prompt logic. The user may then select if and when they would like to analyse the patient’s local record by manually selecting the ***Run Paths*** menu option, see Section 6.

3.5.4 Notifications

Enter the values for the following fields in this segment:

- ***Show balloon notifications*** – While the Local Clinical System is in use, the Prompts module will display balloon tip notifications when a patient is analysed if this option is checked. The balloons will be opened from the icon tray (normally in the bottom right corner of the screen).

The prompt logic determines which balloons are shown for a particular patient. If a balloon is clicked while it is visible a window will be opened showing more details on the analysis performed and further actions that can be taken.

Un-checking this option will disable these balloon notifications. The user can open the details window at any time by manually selecting the ***Open Prompts*** menu option, see Section 6.

- ***Show notifications for (secs)*** – Specifies the approximate time in seconds that balloon tip notifications will be displayed before automatically being removed.
- ***Combine Balloons*** – Check this box to combine multiple notifications into a single balloon. The prompt logic may display multiple balloon notifications for a single patient. If this option is unchecked multiple balloon notifications will be queued and shown one after the other (ie as the previous balloon is dismissed by the user or expires after the above number of seconds).

  Note: A single balloon has a limit of approximately 170 characters, so any text over the limit from combining notifications will not be visible until the details window is opened.

- ***Balloon count limit*** – Specifies the maximum number of balloons that will be output per patient. If this value is set to 1, then the ***Combine Balloons*** option has no effect.

Note: Aside from local preferences and specific types of analysis, it is expected that normally outputting multiple notifications per patient and combining them or queuing them will cause nuisance to the user. It is therefore recommended that the prompt logic is setup to output a single balloon notification per patient that directs the user to the details window if applicable for more information. In this case the settings for the ***Combine Balloons*** and ***Balloon count limit*** options can be ignored.

If prompt logic is being used that does output multiple balloon notifications per patient then these settings will need to be adjusted according to user preferences. Leaving them at their default values will only ever show the first notification for each patient regardless of the prompt logic.

3.5.5 Output Window

Enter the values for the following fields in this segment:

- ***Remember Window Position*** – Check this box to automatically remember the last position and size of the details window relative to the computer desktop. In this case the window will always be restored to the remembered settings. If the remembered settings cannot be displayed on the current desktop (ie if the screen changes or when using remote desktop) then the window will be shown as closed as possible to the remembered settings. Unchecking this option will always open the details window with a minimum size towards the top left of the desktop.

- ***Collapsed View*** – Check this box to open the details window in the collapsed 'contents page' view. Each path heading will be displayed with a plus icon that when clicked will open the details for the selected path. Unchecking this option will open the details window showing all of the details at once. If the output is too large for the size of the window the user will need to scroll down in the window to see all of the output.
- ***Path Tracing Level*** – Specifies the level of tracing output that is included in the details window. The normal output is shown when the level of tracing is set to zero – which is the default value of this option. This value should not be changed unless the user is specifically asked to change it to assist in analysing an issue with the Prompts module. A value of 10 will show the most verbose tracing output.

4 Usage - Getting Started

4.1 Starting RecordConnect

The RecordConnect application can be set to automatically start when logging into windows, see section 2.2. This is the most convenient way to start the application.

To start RecordConnect manually, click the ***RecordConnect*** menu item from the ***Programs -> Extensia*** submenu in the main Windows ***Start*** menu.

Once started, an icon will be displayed in the Windows icon tray as shown in Figure 18.

Figure 18: RecordConnect Tray Icon

The colour of the two displays indicates the connectivity status with the Local Clinical System (bottom-left) and the RecordPoint server (top-right). Green indicates successful connection and red indicates not connected. Yellow indicates that the connection has not been configured (or is not enabled) in the settings and that a connection will not be attempted.

The most likely cause of the Local Clinical System not being connected (bottom-left is red) is that the Local Clinical System has not yet been started or the user has not logged into it yet.

The most likely cause of the RecordPoint server not being connected (top-right is red) is not entering the RecordPoint account password correctly. However, it may be necessary to change configuration settings to obtain successful connections as described in Section 3.

After a successful login has been completed with the Local Clinical System, RecordConnect will establish a connection to the Local Clinical System. When the connection to the Local Clinical System is successful, the modules in RecordConnect are then activated based on their settings.

If the RecordPoint module is enabled, RecordConnect will establish a second connection with the RecordPoint server. The RecordPoint Agent login credentials will be required to complete the connection. A pop-up window will be displayed to request the password for the RecordPoint account, as shown in Figure 19.

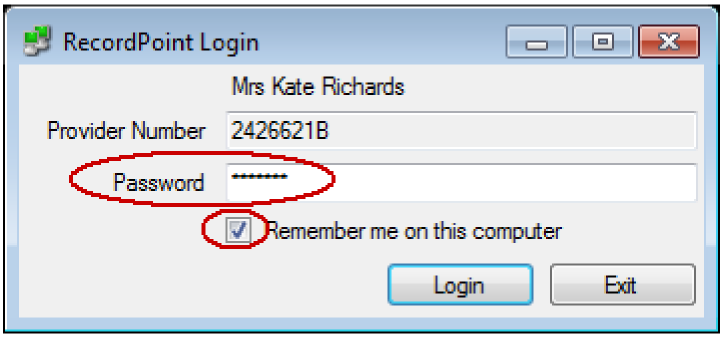

Figure 19: RecordPoint Login

Check the ***Remember me on this computer*** option to allow RecordConnect to automatically connect to the RecordPoint server without prompting.

The ***Provider ID*** will be automatically retrieved from the Local Clinical System. If the user does not have a suitable identifier in the Local Clinical System, the pop-up window will allow entry of a RecordPoint Agent identifier.

If the provider has not been correctly registered in the RecordPoint server or the incorrect password is entered the connection to the RecordPoint server will fail.

If a connection cannot be successfully established with the RecordPoint server, click the Exit button to end RecordConnect. To start RecordConnect again, after the issue has been resolved, simply follow the manual start instructions at the beginning of this section.

If the Prompts module is enabled, RecordConnect will check the configured service to see if the prompt logic configuration is up to date. If a new version is available it will automatically download the new configuration.

4.2 RecordConnect Context Menu

By right-clicking on the RecordConnect icon in the Windows icon tray, a context menu will be displayed as shown in Figure 20.

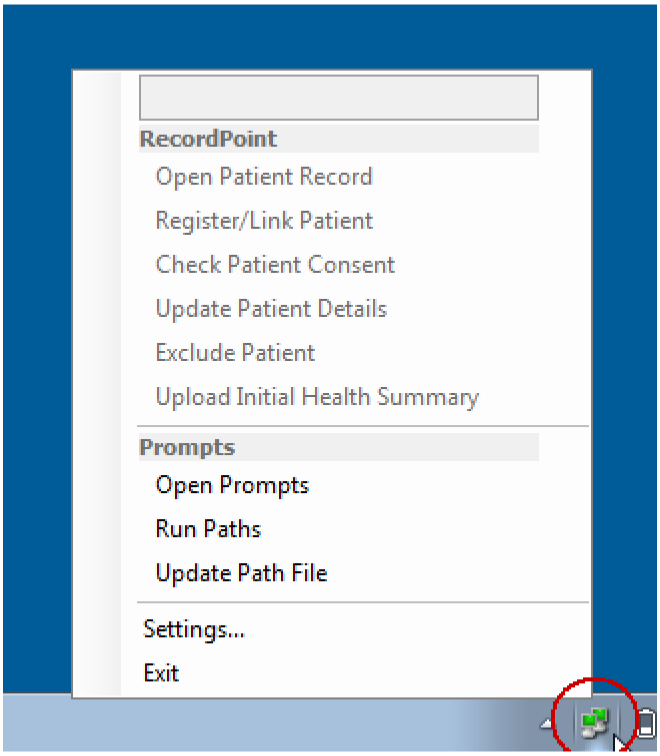

Figure 20: RecordConnect Context Menu

The context menu will grey out options that are not currently available. For example, most menu options will be greyed out when there is no Patient open in the Local Clinical System.

4.3 Stopping RecordConnect

RecordConnect will be automatically stopped when logging off or shutting down Windows.

To manually stop RecordConnect, right-click the RecordConnect icon in the Windows icon tray and select ***Exit*** from the context menu, as shown in Figure 21.

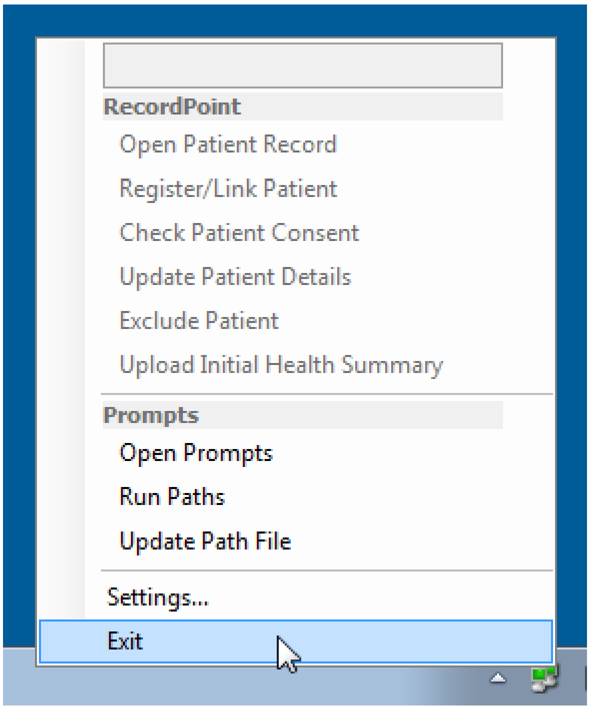

Figure 21: Exit RecordConnect

To start RecordConnect again, see Section 4.1.

5 Usage - RecordPoint

5.1 Opening Patient's Shared Health Record

When a Patient record is opened in the Local Clinical System that has been registered and linked to the Shared Health Record, a balloon tip is displayed offering to view the Shared Health Record as shown in Figure 22.

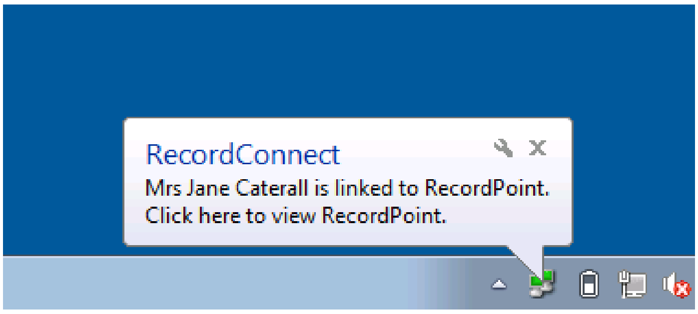

Figure 22: View Shared Health Record Balloon

Click on the balloon to open the Patient's Shared Health Record. Alternatively, to open the Patient's Shared Health Record at any time, choose the ***Open Patient Record*** menu item from the context menu as shown in Figure 23.

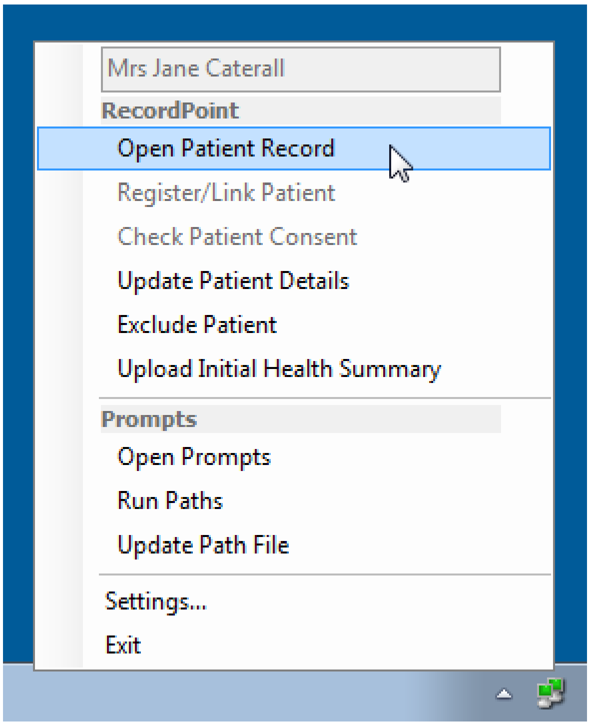

Figure 23: RecordConnect - Open Patient Record

The default web browser will be opened and the Overview page for the Patient will be displayed, as shown in Figure 24.

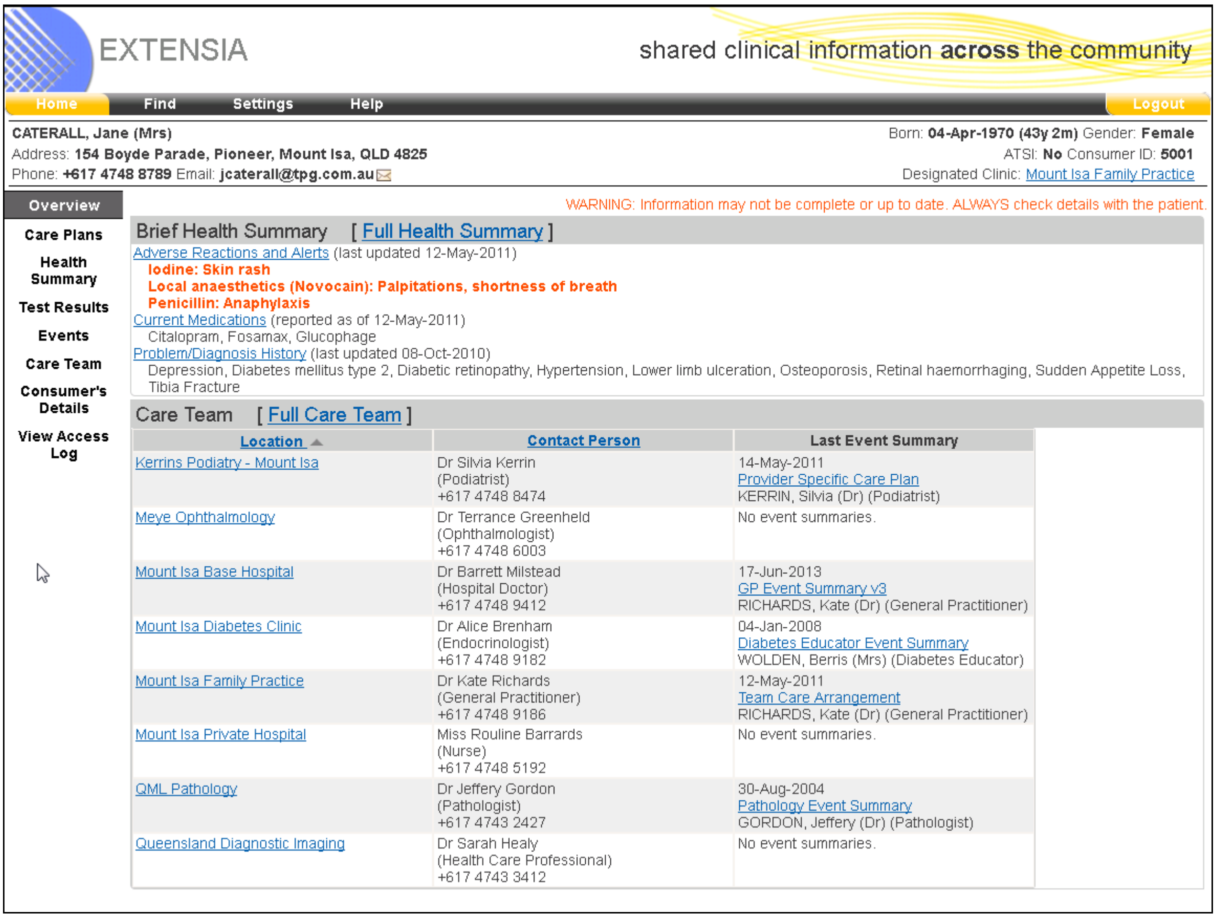

Figure 24: Shared Health Record – Consumer Overview

5.2 Registering Shared Health Record for Patient

Registering a Patient will create a new Shared Health Record for the Patient. This process requires informed Patient consent and the collection of Patient details which are stored in the Shared Health Record.

It is important that the registration process is not completed multiple times for the same Patient, otherwise they will end up with multiple fragmented records, each containing only parts of their Shared Health Record.

RecordConnect will automatically search for an existing registration for the Patient. If an existing shared record is found, the Link process should be used to link the local record to the existing shared record, see Section 5.3. If the Patient is not already registered, the registration process described below will create a new Shared Health Record for the Patient.

When a Patient is opened in the Local Clinical System that has not been previously registered in the Shared Health Record (or previously excluded, see section 3.3.4), a balloon tip will appear as shown in Figure 25.

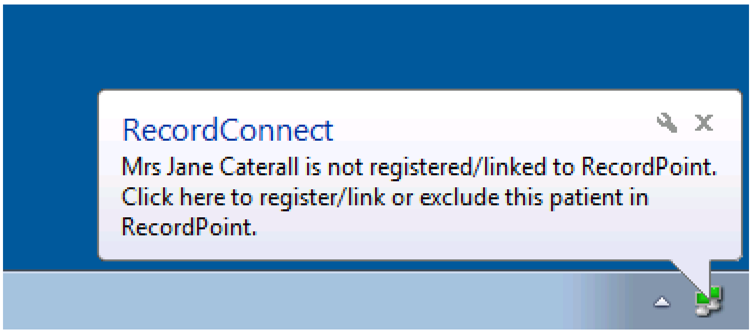

Figure 25: Registration Balloon

Click on the balloon to begin the registration process. Alternatively, choose the ***Register/Link Patient*** menu item from the context menu as shown in Figure 26.

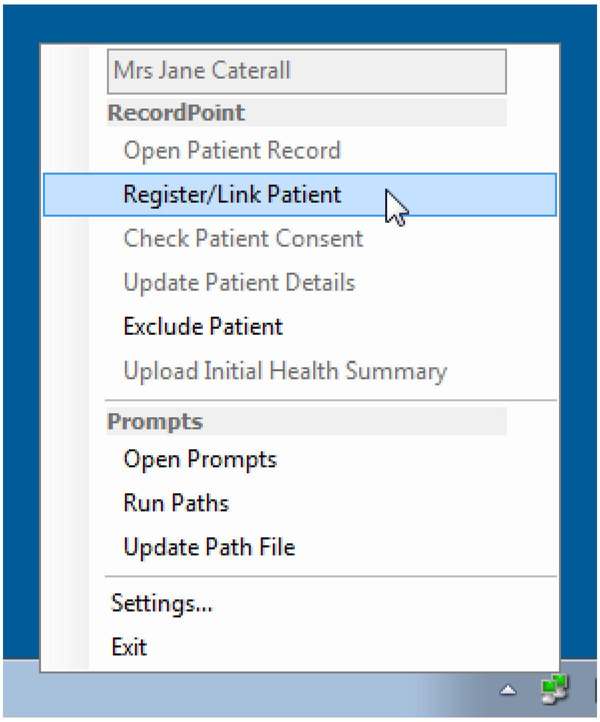

Figure 26: Register Patient Menu Item

The first stage of the registration process involves searching for Shared Health Records of Patients with a similar name, as shown in Figure 27.

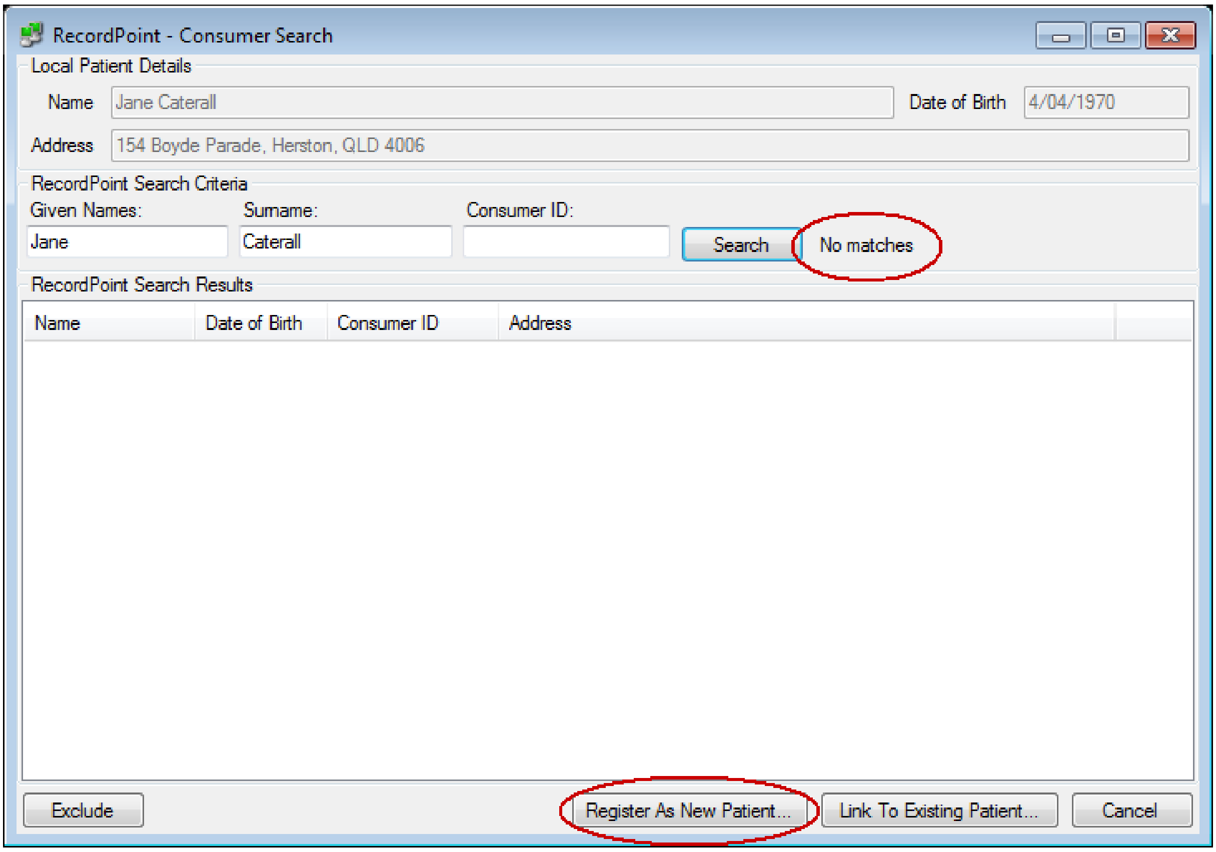

Figure 27: Registration Stage 1: Patient Search

It is possible that the patient has already been registered by another location. If one is found, the Link process should be used to link the local record to the existing shared record, see Section 5.3.

If no matches can be found, as shown in Figure 27, it is likely that the patient has not previously been registered and a new registration in the Shared Health Record is needed.

Click the ***Register As New Patient*** button to begin the second stage of the registration process.

The ***RecordPoint Patient Registration*** form is displayed as shown in Figure 28.

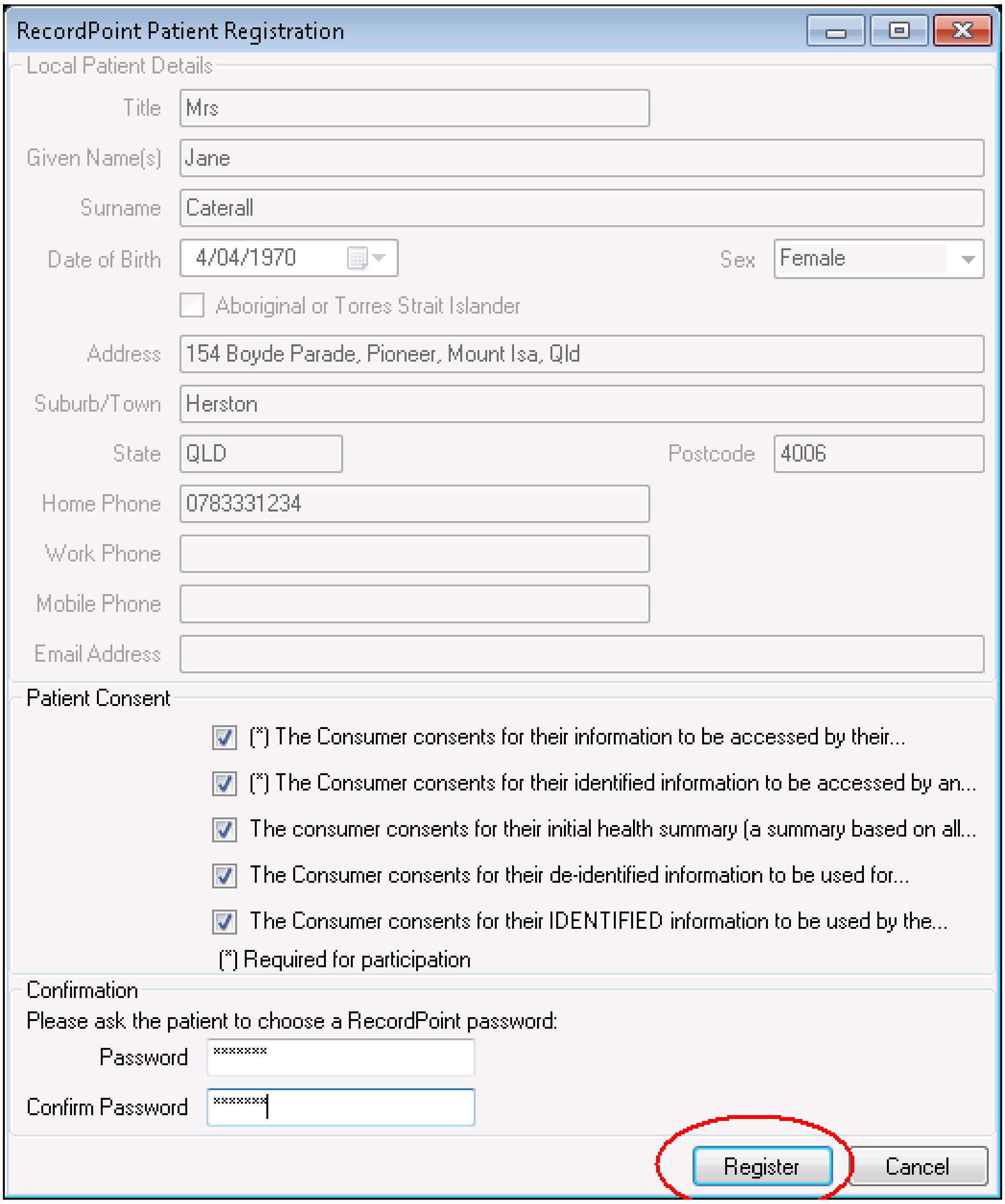

Figure 28: Registration Stage 2: Collect Details

The patient's demographic details are automatically extracted from the Local Clinical System. These details should be confirmed with the Patient. If they need to be corrected, they should be corrected directly in the Local Clinical System and the registration process restarted.

The Patient must provide informed consent to create a Shared Health Record. There are mandatory consent statements, marked by ***(*)***, and optional consent statements. The Patient's consent is recorded using the tick boxes. The Patent cannot be registered unless they consent to all the mandatory consent statements.

For the Patient to access their Shared Health Record they must be assigned an initial temporary password which must then be changed when the patient first logs in. This password can be assigned for the Patient and given to them, or entered directly by the Patient.

If the patient is not being given direct system access, or will be assigned an initial password at a later stage, the password entry can be skipped. See the ***Allow Empty Password*** preference described in section 3.3.3.

Once demographic, consent and password details have been verified/entered, click the ***Register*** button to complete the registration process.

The Register button will not be enabled if mandatory fields do not have values, as shown in Figure 29. Any mandatory fields that have not been completed will be highlighted in red.

The patient's demographic details are automatically extracted from the Local Clinical System. If any of these mandatory fields are missing they will need to be updated directly in the Local Clinical System and the registration process restarted.

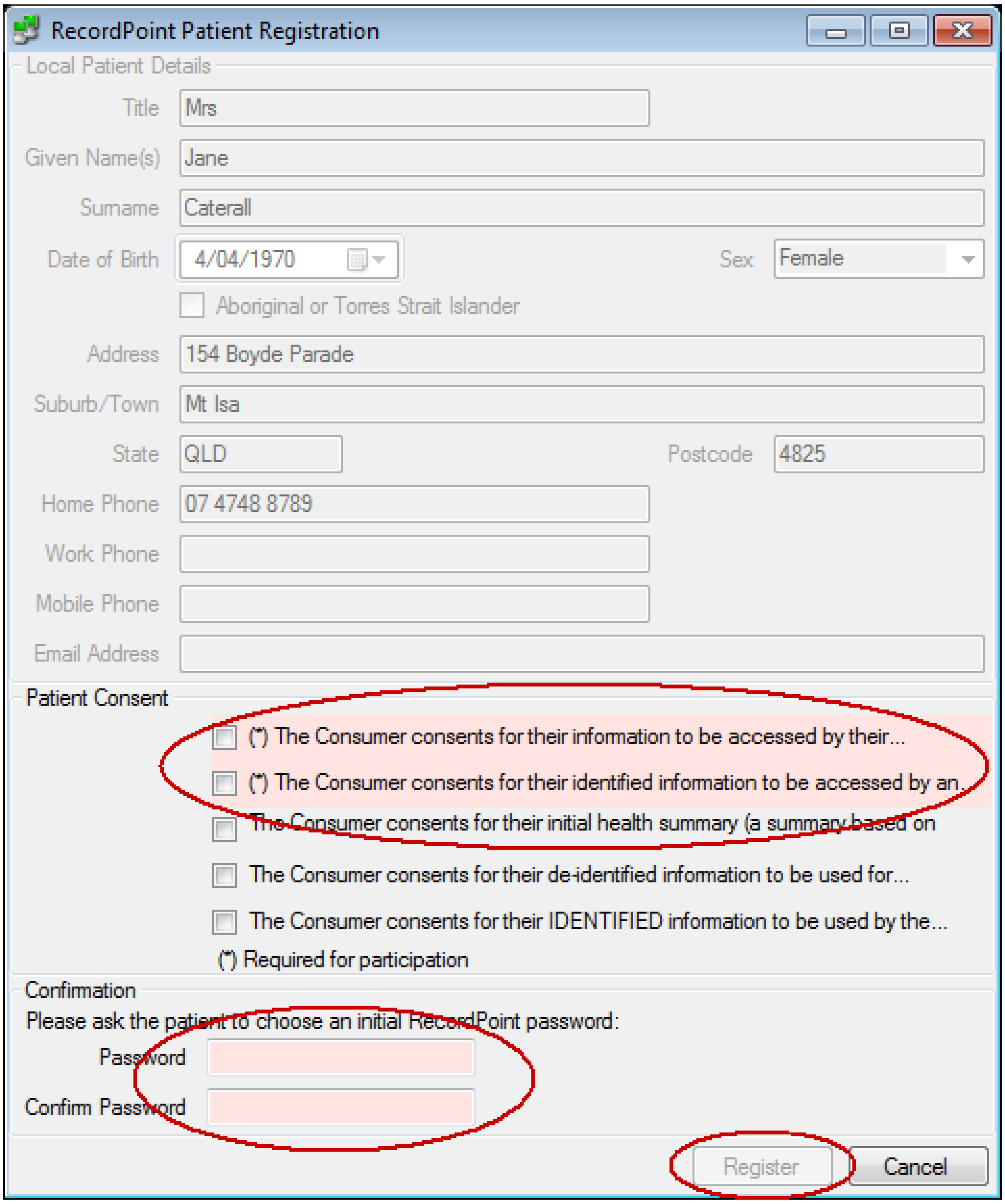

Figure 29: Registration Mandatory Fields

Once all the mandatory fields have been completed the ***Register*** button will be enabled. Click the ***Register*** button to complete the registration process.

A balloon tip will be displayed indicating that the Patient has now been registered in the RecordPoint system and their Shared Health Record has been linked to the Local Clinical System, as shown in Figure 30.

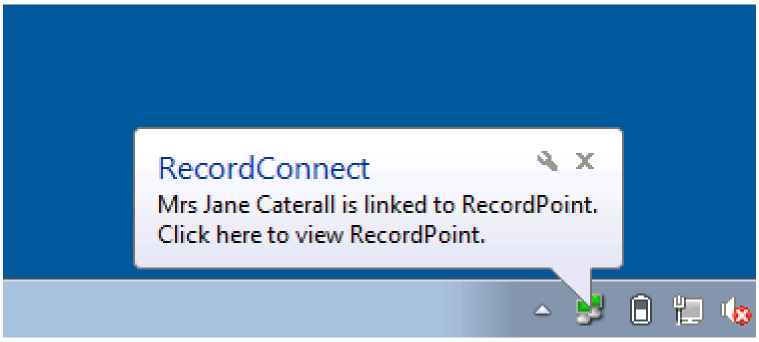

Figure 30: Registration Success

Click on this balloon to view the Patient's Shared Health Record. As this is a newly registered Patient, their Shared Health Record will be empty. Follow the process to upload an Initial Health Summary as described in Section 5.7. This will pre-populate the Shared Health Record with data from the Local Clinical System.

Notes:

- Updating the consent statements requires a specific privilege. The consent statements will not be available for selection if this privilege has not been granted to the user. If this is the case, the registration process will need to conclude by following the Check Patient Consent process, see Section 5.6.
- Registering a Patient automatically adds the registering Location to the Patient's Care Team. The Patient will need to consent to their Care Team containing the Location performing the registration.

5.3 Linking Patient to Existing Record

It is assumed that patients will attend multiple health care locations that upload patient event summaries to their Shared Health Record. It is therefore possible for Patients to already be registered in the RecordPoint system, but the patient record in the Local Clinical System is not linked to their Shared Health Record.

In this case, it is important that the existing Shared Health Record is linked to the Local Clinical System following the linking process. If the registration process is followed multiple times for the same Patient, they will end up with multiple fragmented records, each containing only parts of their Shared Health Record.

RecordConnect will automatically search for an existing registration for the Patient so the correct process can be followed.

The process of linking the local record to an existing shared record begins in the same way as the new registration process, see Section 5.2.

When a Patient is opened in the Local Clinical System that has not been previously linked in the RecordPoint system (or previously excluded, see section 3.3.4) a balloon tip will appear as shown in Figure 31.

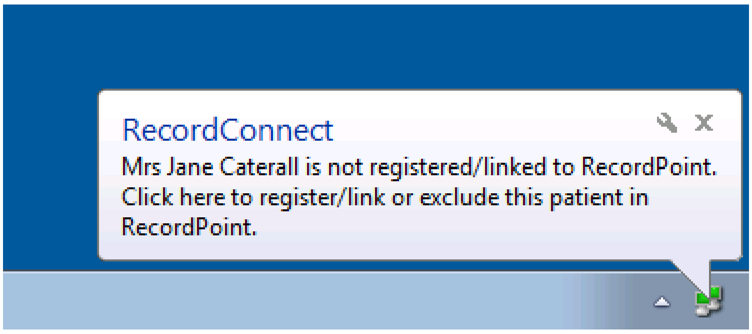

Figure 31: Link Balloon

Click on the balloon to begin the linking process. Alternatively, choose the ***Register/Link Patient*** menu item from the context menu as shown in Figure 32.

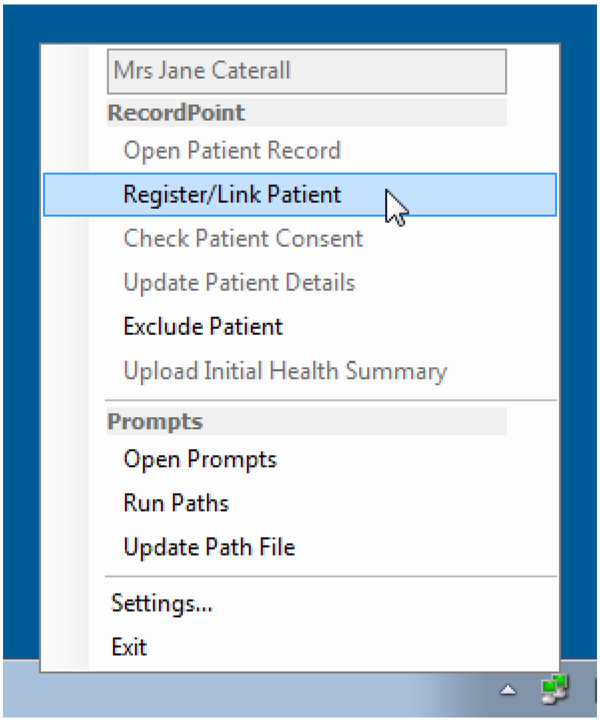

Figure 32: Link Patient Menu Item

The first stage of the linking process involves searching for Shared Health Records of Patients with a similar name and date of birth. Assuming the patient already has a Shared Health Record, at least one likely match will be found as shown in Figure 33.

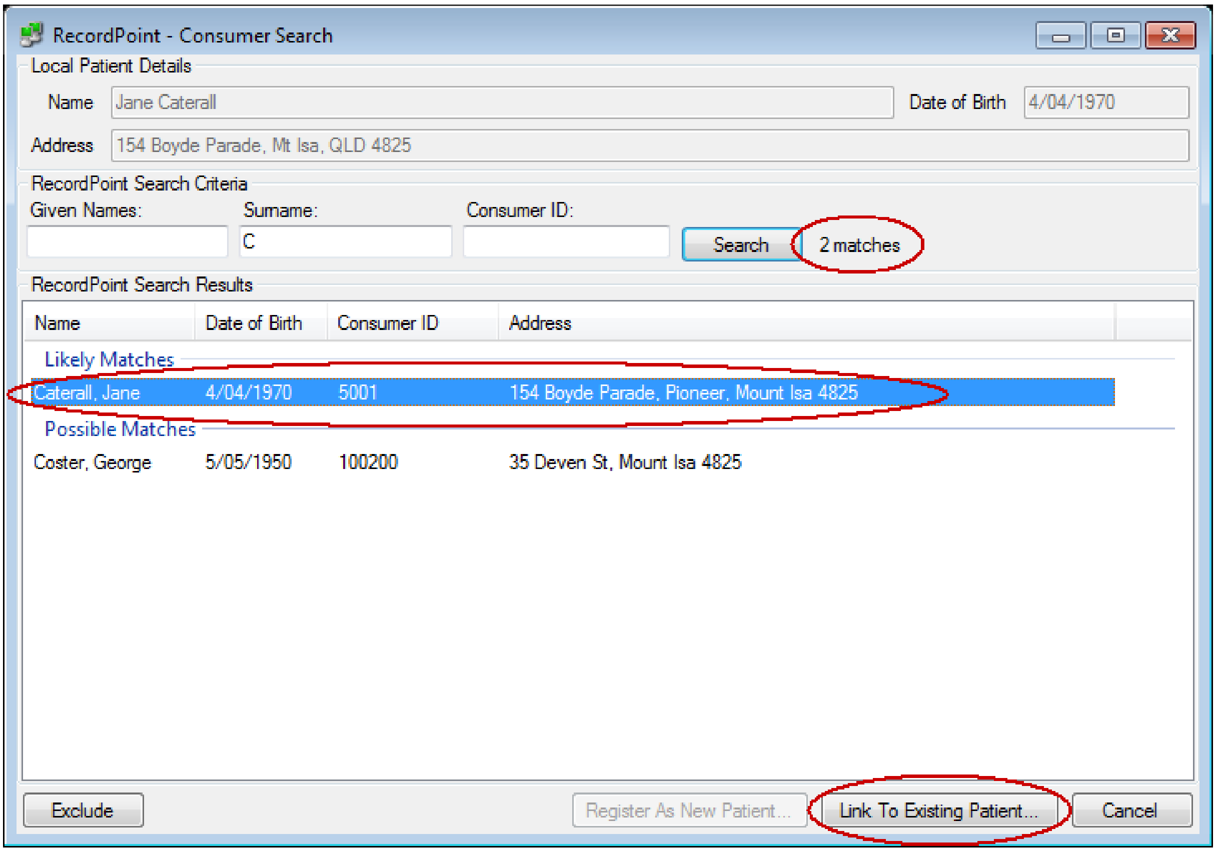

Figure 33: Link - Patient Search

In addition, possible matches may also be found. If the correct patient Shared Health Record cannot be found in the likely matches, check the possible matches list.

Notes:

- To find the correct patient's Shared Health Record, change the search criteria and click the search button. For example search for the patient's initial instead of their full name.
- If the patient knows their consumer id, this can be used to easily find the correct Shared Health Record.

Select the row containing the correct Patient in the Search Results list and click the ***Link To Existing Patient*** button to link the selected shared record with the local record. A confirmation page will be displayed as shown in Figure 34.

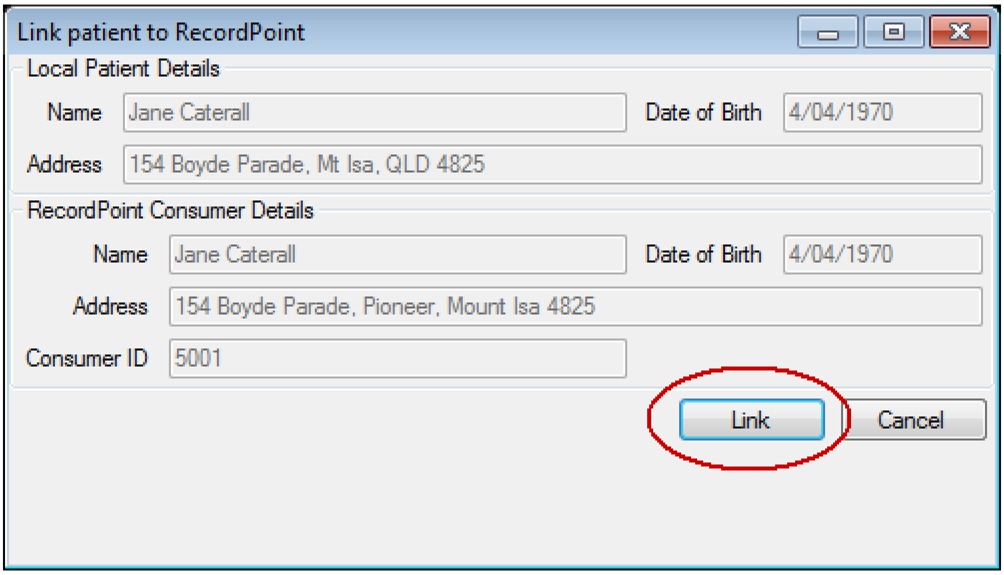

Figure 34: Link Confirmation

The details of the Patent open in the Local Clinical System will be displayed following the RecordPoint Patient details selected from the Search Results list. Verify that that the correct local record is being linked to the correct shared record and click the ***Link*** button to complete the link.

A balloon tip will be displayed indicating that the local record has now been linked with the shared record, as shown in Figure 35.

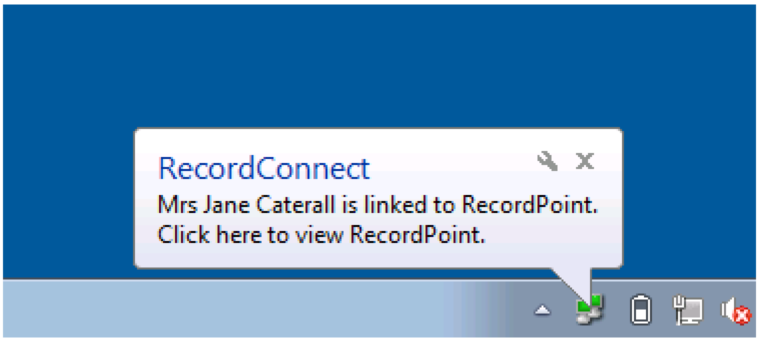

Figure 35: Link Success

Click on this balloon to view the Patient's Shared Health Record.

Notes:

- Patients who have not consented to use the system cannot complete the linking process. RecordConnect will present an error in response to a linkage attempt. In this case it is recommended to exclude the Patient, see Section 5.5, until the Patient changes their consent to participate in the system.
- The Patient must consent for the Location performing the link to be on the Patient's Care Team. RecordConnect allows this consent to be gained by the Patient Entering their password on the Link Confirmation page. If the Patient does not remember (or has not been given) their password, the Care Team consent must be recorded separately and the Care Team updated via the registration system.

5.4 Updating Patient Details

RecordConnect supports the update of demographic details from the Local Clinical System to the Shared Health Record. This is useful for keeping the details up-to-date in the Shared Health Record after they have been updated in the Local Clinical System. For users with the appropriate privileges, the update function also supports the maintenance of the Patient consent statements in the Shared Health Record.

Updating the patient details is possible while the Patient record is open in the Local Clinical System. Choose the ***Update Patient Details*** menu item from the context menu as shown in Figure 36.

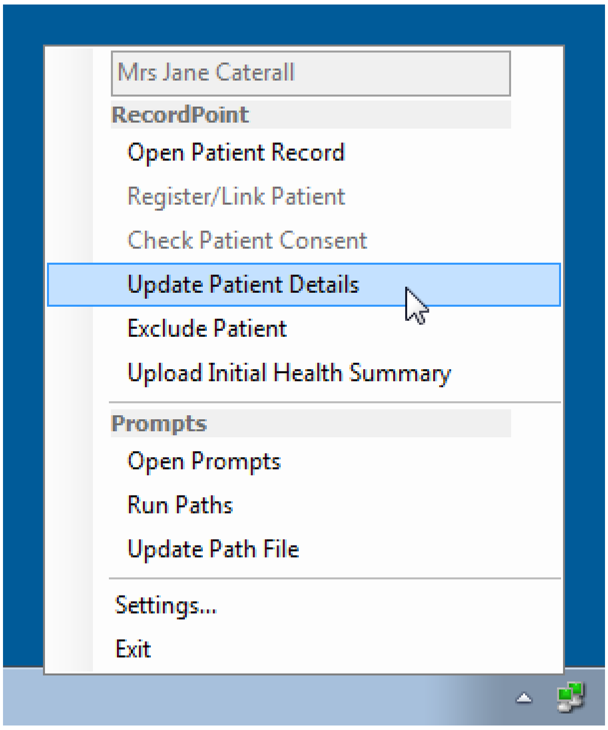

Figure 36: Update Menu Item

The Patient's registration details page is displayed as shown in Figure 37.

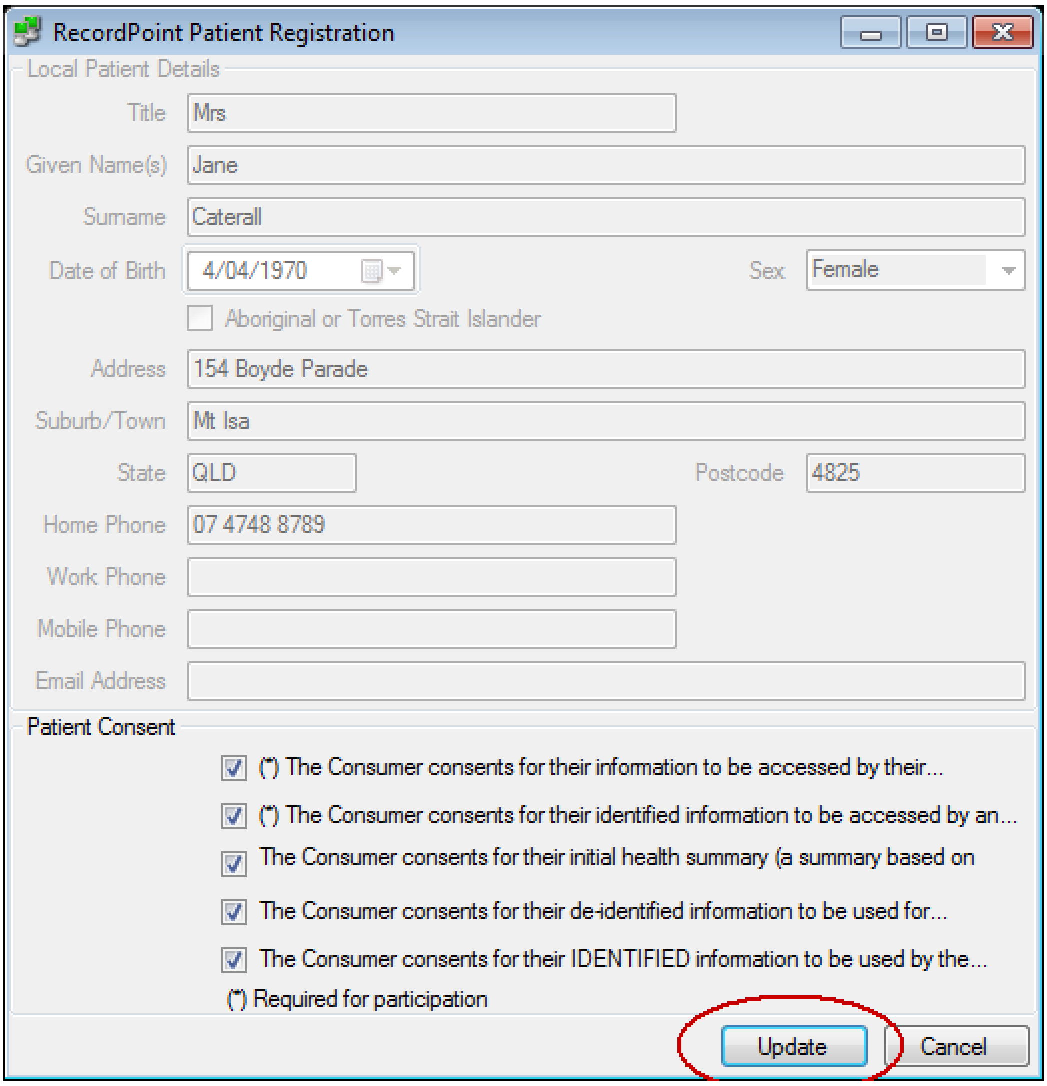

Figure 37: Update Patient Details

The patient's demographic details are automatically extracted from the Local Clinical System. These details should be confirmed with the Patient. If they need to be corrected, they should be corrected directly in the Local Clinical System and the update process restarted.

If the user has the appropriate privileges, the Patient's Shared Health Record consent will also be shown on the bottom. The patient's consent can be changed by ticking or un-ticking the consent statements.

To update these details in the Patient's Shared Health Record, click the ***Update*** button.

Note:

- Removing any of the mandatory consent statements, marked by ***(*)***, will withdraw the Patient from the RecordPoint server. Their Shared Health Record will no longer be accessible by their Care Team.

A balloon tip will be displayed indicating that the details have been updated in the Shared Health Record, as shown in Figure 38.

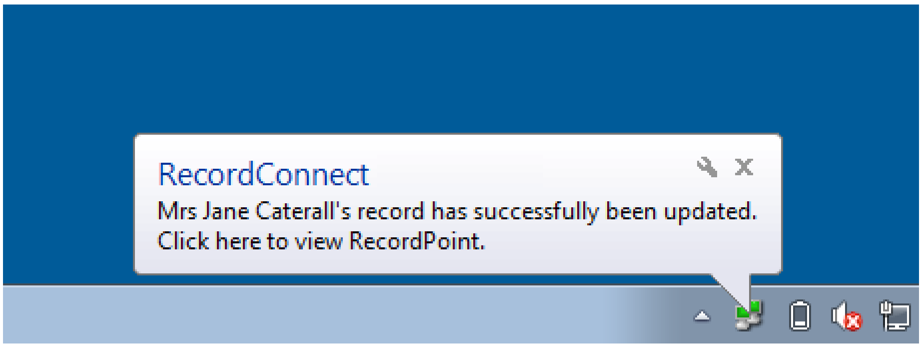

Figure 38: Update Success

Click on this balloon to view the Patient's Shared Health Record.

5.5 Excluding Patient from RecordPoint

Where a patient does not consent to have a Shared Health Record, or does not consent for the current Location to be on their Care Team, it can be convenient to mark the Patient as excluded in the RecordConnect. This simply means that RecordConnect will not perform the normal processing and will provide a reminder that the patient chooses not to have a Shared Health Record accessed by this location.

The Patient can be excluded during the Registration and Linking processes (see Section 5.2 - Figure 27 or Section 5.3 - Figure 33 respectively) by clicking the ***Exclude*** button.

To exclude the patient at any other time, while they are open in the Local Clinical System, choose the ***Exclude Patient*** menu item from the context menu as shown in Figure 39.

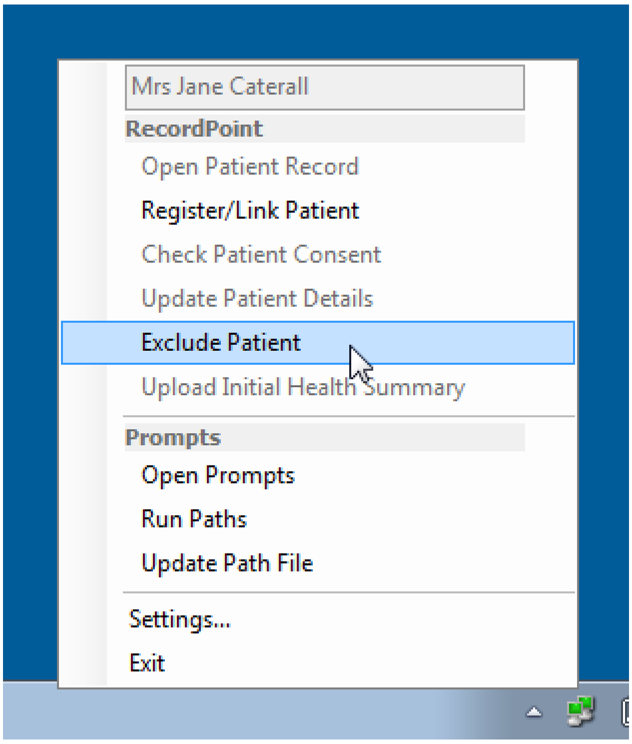

Figure 39: Exclude Menu Item

The exclude confirmation window will be displayed as shown in Figure 40.

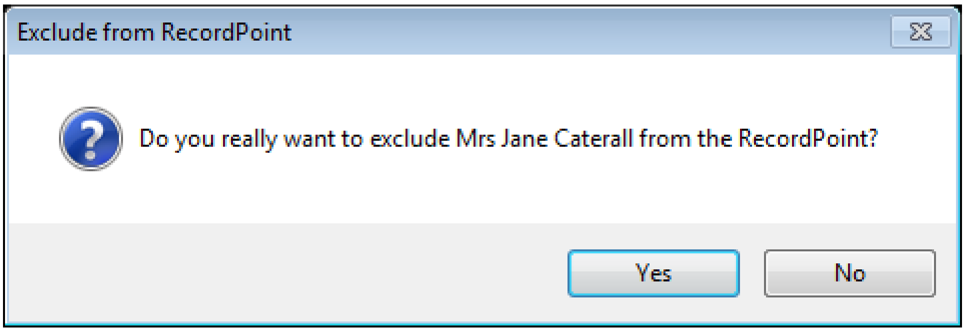

Figure 40: Exclude Confirmation

Click the ***Yes*** button to exclude the Patient from further RecordConnect processing.

A balloon tip will be displayed indicating that the patient is now excluded from the RecordPoint at this workstation, as shown in Figure 41.

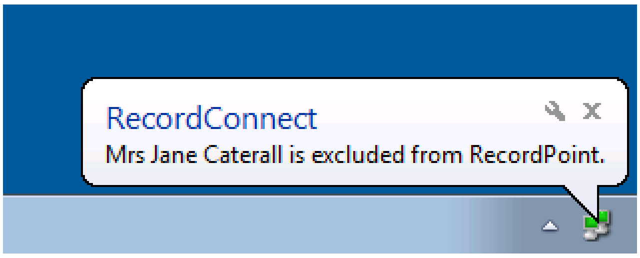

Figure 41: Exclude Success

Click on this balloon to establish/restore access to the Patient's Shared Health Record and allow normal Shared Health Record processing to resume for the Patient, as per Section 5.3. Alternatively to remove an exclusion see section 3.3.4.

5.6 Check Patient Consent

A Patient can be registered in the RecordPoint system, but their record is inactive due to lack of appropriate consent. In general this will be due to the Patient withdrawing consent but it can occur if the Patient was incorrectly registered.

While the Patient is in this state their Shared Health Record cannot be accessed. A user with the appropriate privileges, after gaining the Patients consent, will need to update the mandatory consent statements to activate the Patient's Shared Health Record.

As RecordConnect cannot continue until the consent has been changed, this function allows the user to check the Patient's current consent status in RecordPoint.

When a Patient is opened in the Local Clinical System that is currently linked but is not currently consenting, a balloon tip will appear as shown in Figure 42.

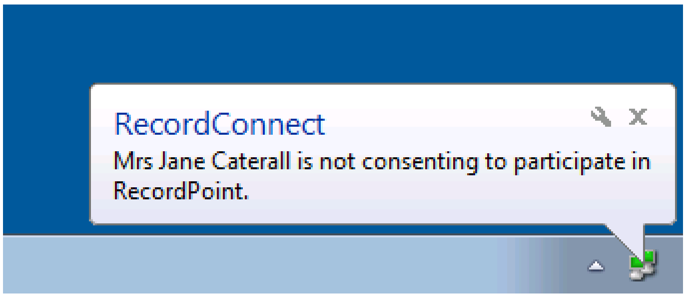

Figure 42: Not Consented Balloon

To re-check the Patient's consent status in RecordPoint, while they are open in the Local Clinical System, click the ***Check Patient Consent*** menu item in the context menu as shown in Figure 43.

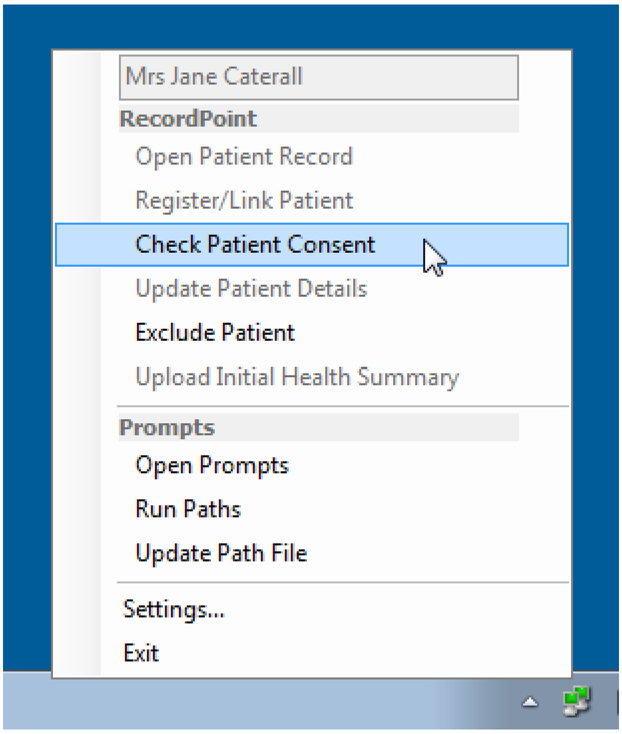

Figure 43: Check Patient Consent Menu Item

If the Patient consent statements still do not include the mandatory consent, then the 'is not consenting' balloon will be displayed, as shown in Figure 42.

Once the patient's consent statements have been updated to include mandatory consent, a balloon tip will be displayed indicating that access to the Patient's Shared Health Record has been restored, as shown in Figure 44.

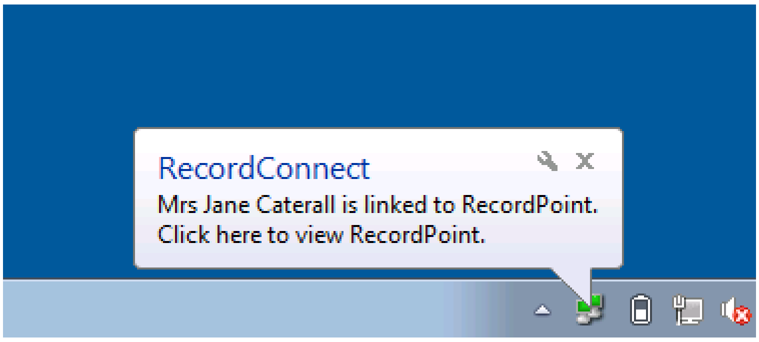

Figure 44: Consent Success

Click on this balloon to view the Patient's Shared Health Record.

5.7 Uploading Initial Health Summary

When a Patient is first registered in the Shared Health Record, their record is empty. The Initial Health Summary is designed to pre-populate the Shared Health Record with a snapshot of the clinical data in the Local Clinical System to-date.

To upload an Initial Health Summary from data in the local record, while the patient is open in the Local Clinical System, click the ***Upload Initial Health Summary*** menu item in the context menu as shown in Figure 45.

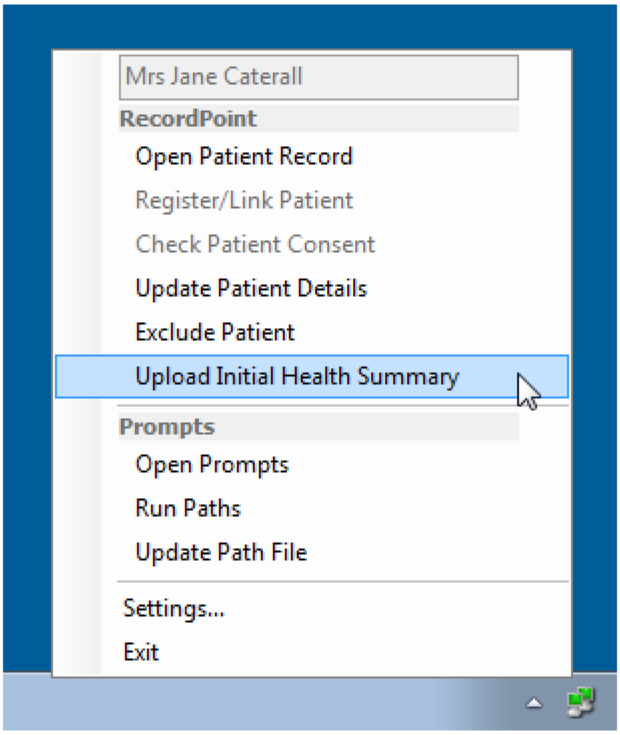

Figure 45: Upload Initial Health Summary Menu

Warning: This may take some time to load based on the size of the patient's record.

A summary of the relevant information from the patient's local record is collected and displayed for review, as shown in Figure 46.

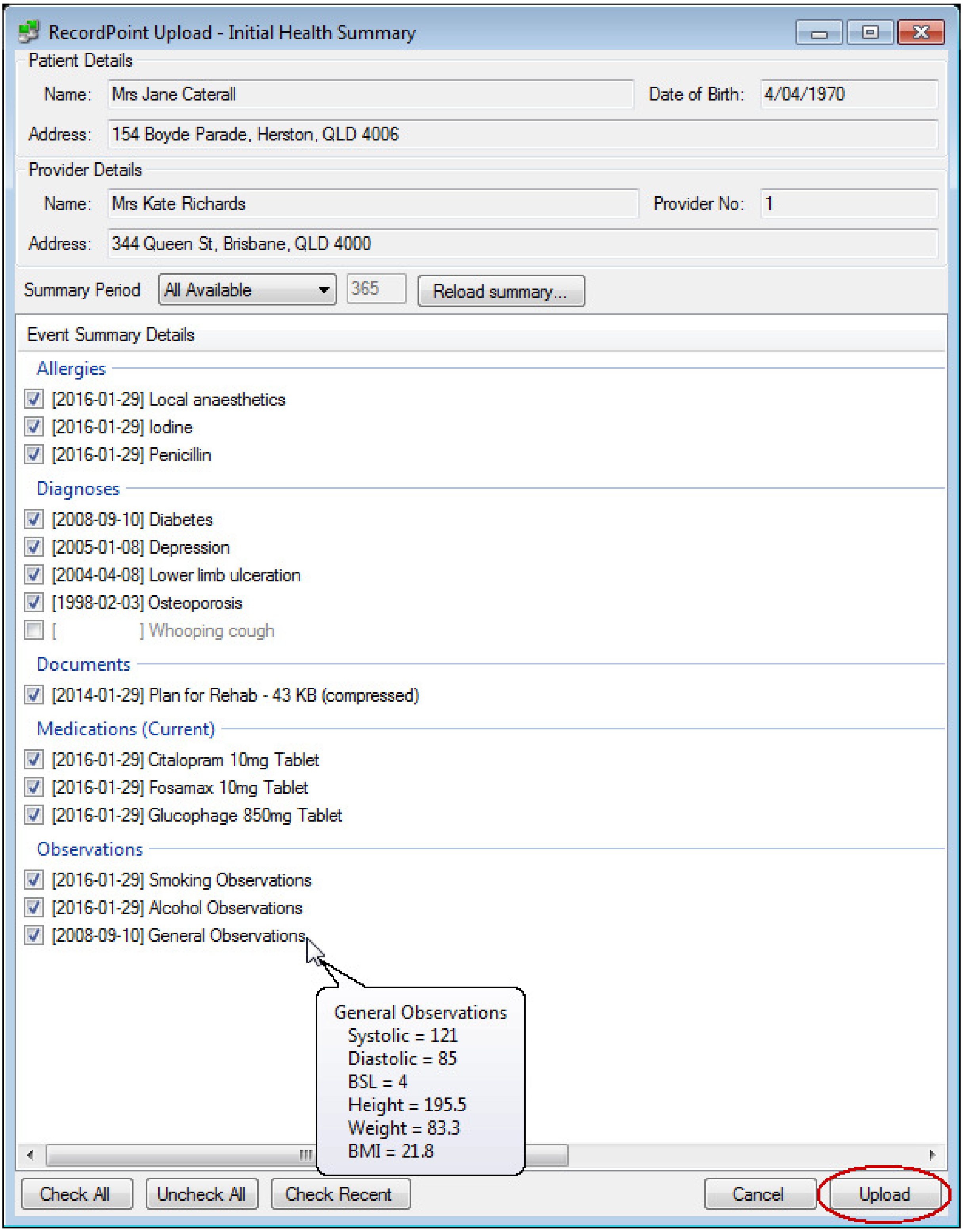

Figure 46: Upload Initial Health Summary

By default, none of the clinical data items are checked for upload. Once the required items are checked for upload, click the ***Upload*** button to submit the Initial Health summary to the Shared Health Record.

See section 5.9 for details on how to check items and use other features of the upload form.

To view the data that has been uploaded to the Shared Health Record, open the Patient's Shared Health Record as described in Section 5.1.

If the upload fails for any reason a popup error message will be displayed, for example as shown in Figure 47.

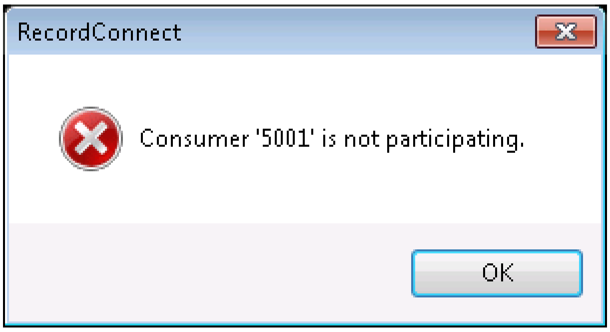

Figure 47: Upload Error Message

See Section 7.1 for details on how to recover from upload errors.

5.8 Uploading Event Summary

At the end of a consultation, a summary of the clinical information entered into the Local Clinical System can be uploaded to the Shared Health Record for sharing with the other members of the Care Team.

To upload an Event Summary of a completed consultation, close the patient's record in the Local Clinical System. RecordConnect automatically detects the end of the consultation and retrieves the relevant information.

Note: This form will only be displayed if the Patient is registered on the RecordPoint server and their Shared Health Record is linked to the Local Clinical Record.

The collected information is displayed for review, as shown in Figure 48.

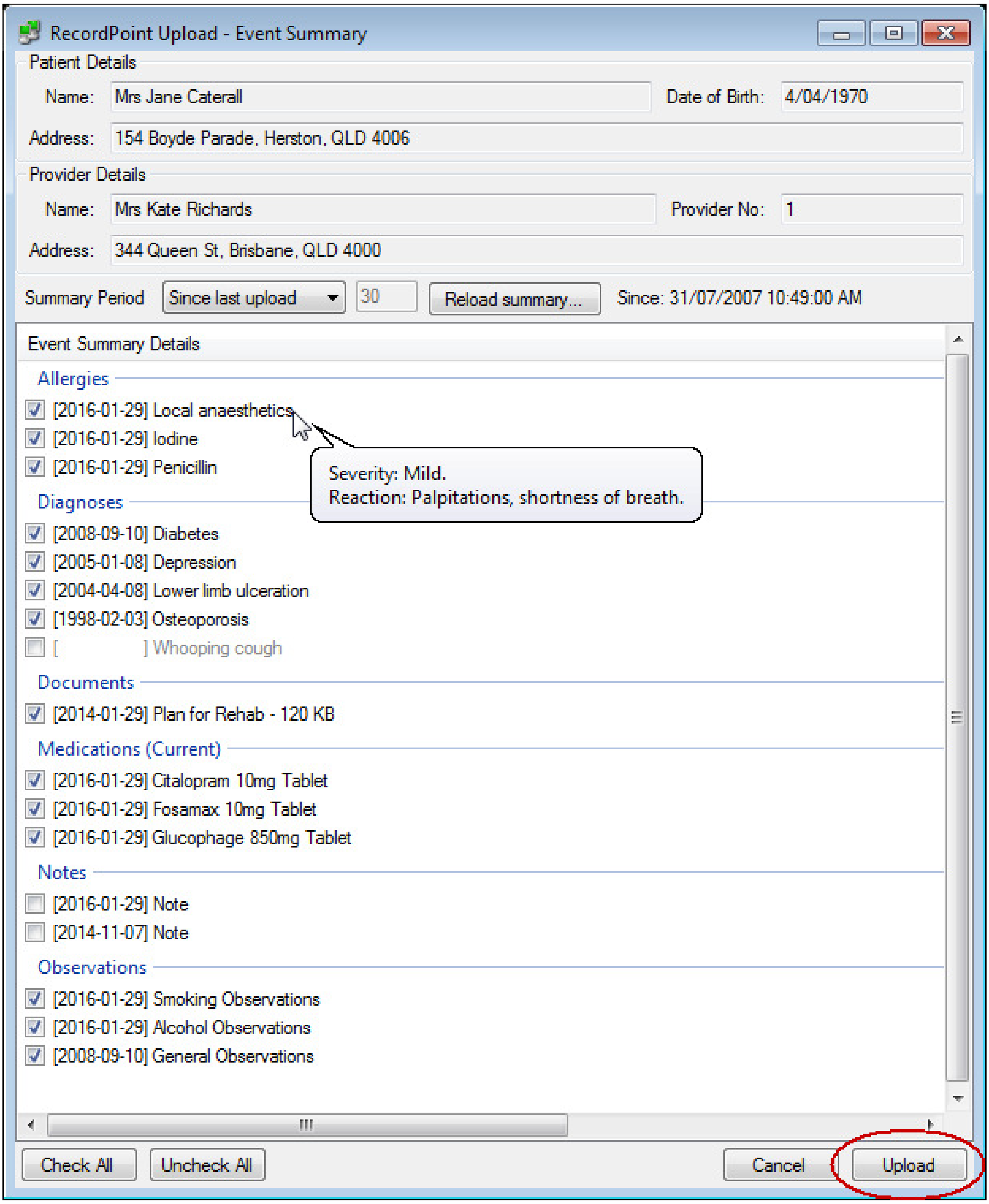

Figure 48: Upload Event Summary

The type of clinical items collected and whether they are checked for upload by default is configured in ***Upload Settings***, see section 3.3.2. Based on these settings, RecordConnect will display the candidate clinical items and pre-check some items for upload.

Once the required items are checked for upload, click the ***Upload*** button to send the Event Summary to the Shared Health Record.

See section 5.9 for details on how to check items and use other features of the upload form.

To view the data that has been uploaded, open the Patient's Shared Health Record as described in section 5.1.

If the upload fails for any reason a popup error message will be displayed, for example as shown in Figure 49.

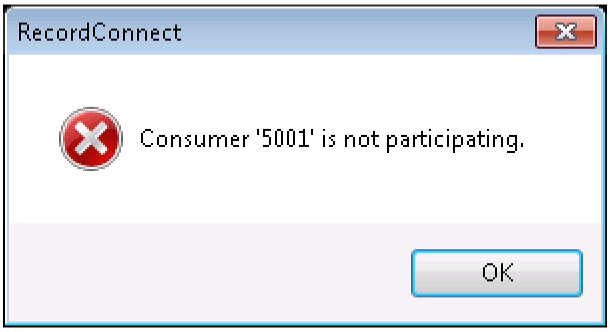

Figure 49: Upload Error Message

See Section 7.1 for details on how to recover from upload errors.

5.9 Using the Upload Form

The functionality of the upload form is common for both the Initial Health Summary and the Event Summary uploads.

5.9.1 Changing the Extraction Date

The items shown on the upload form are extracted based on a start date. All items dated after this date are extracted and included on the form. This is called the ***Summary Period*** as shown in Figure 50.

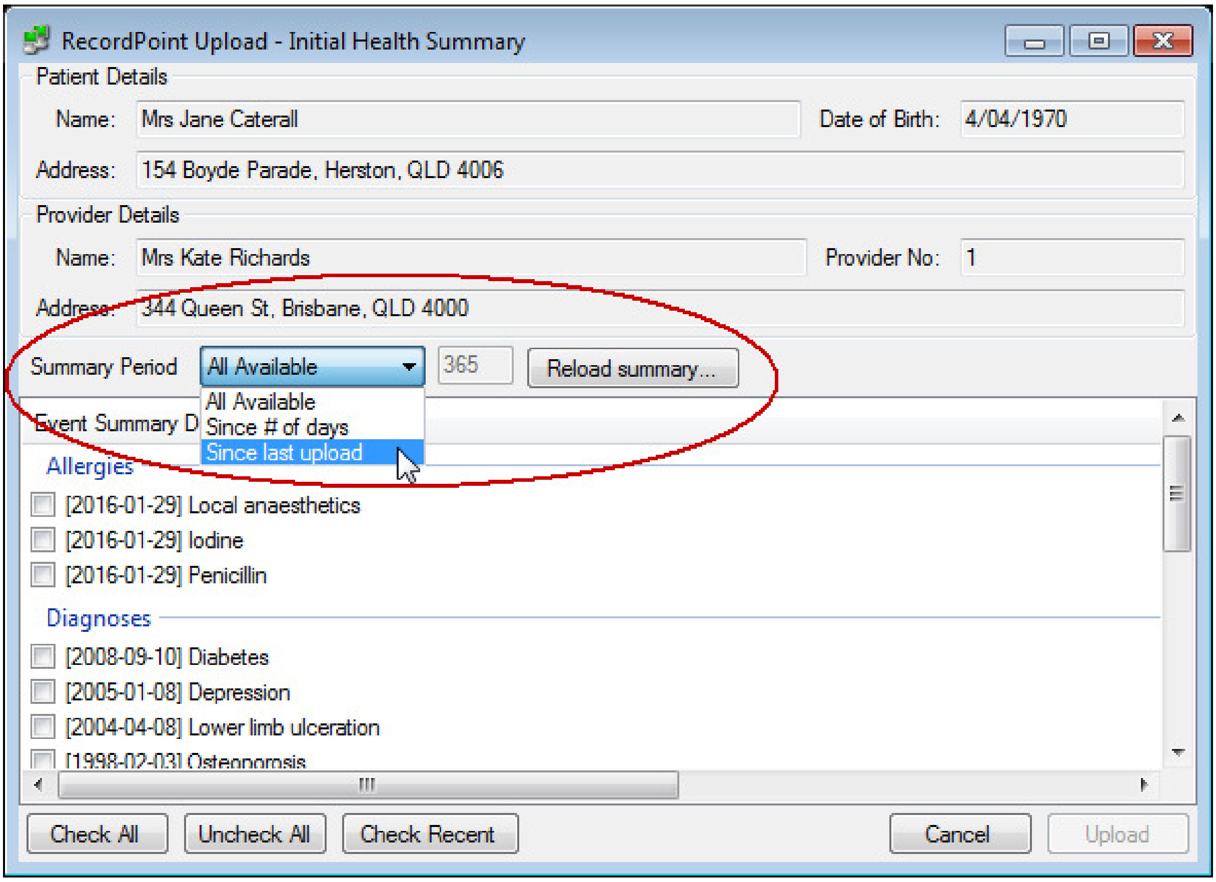

Figure 50: Upload Summary Period

The defaults may not always produce the desired list for a particular patient or situation. The start date can be changed at any time. This will clear the current list of items losing any changes, including checked items. A new extraction based on the selected start date will be reloaded into the upload form.

To change the ***Summary Period***, select from the following options:

- ***All Available*** – Select this option to extract items starting from the beginning of the patient record. Selecting this option will automatically reload the upload form with the new extract.

  Warning: This may take some time to load based on the size of the patient's record.

- ***Since # of days*** – Select this option to extract items dated since the previous specified number of days. Once this option is selected, the field to specify the number of days is enabled. Enter the required number of days and press the ***Reload Summary*** button.
- ***Since last upload*** – Select this option to extract items starting from the date and time of the most recent event uploaded from this location to the patient's Shared Health Record. Selecting this option will automatically reload the upload form with the new extract.

  If there are no new items since the last event uploaded, the ***Event Summary Details*** will be empty.

Pressing the ***Reload Summary*** button at any time will clear the current list and reload a new extract into the upload form.

The ***Summary Period*** default settings for the Initial Health Summary and the Event Summary uploads are configured in ***Upload Settings***, see section 3.3.2.

5.9.2 Selecting Multiple Items

Multiple items can be selected. The selected items can belong to any of the groups. Making a change to one of the selected items will apply the same change to all of the selected items, as shown in Figure 51.

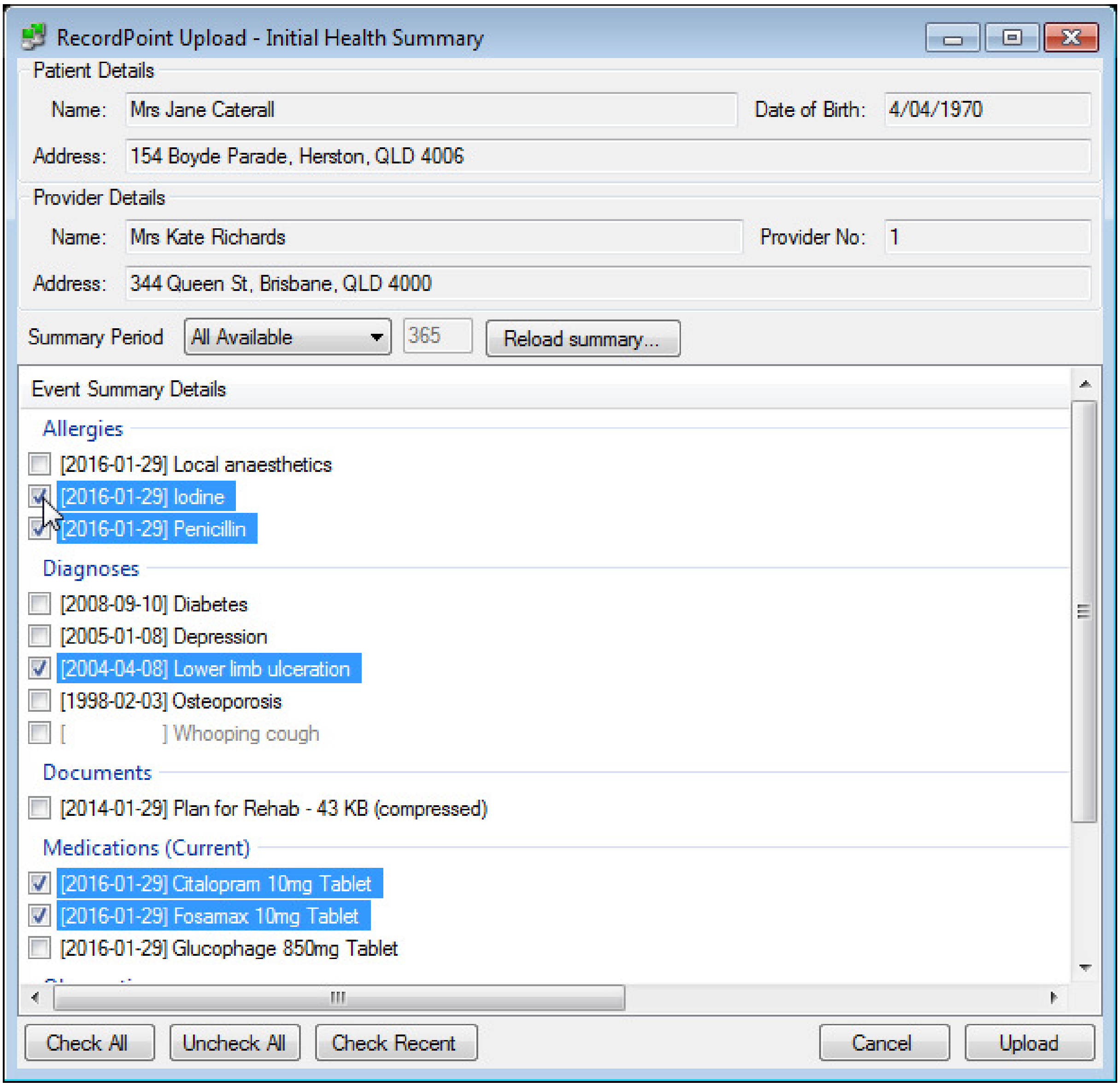

Figure 51: Upload Select Multiple Items

To select a block of items, select the first item in the block and then shift-left-click the last item in the block and all the items in between will also be selected.

Using control-left-click on an item will either select it or de-select it without affecting the selection of the other items.

5.9.3 Checking and Unchecking Items for Upload

Individual items can be included into the upload by checking the check box next to that item, as shown in Figure 52.

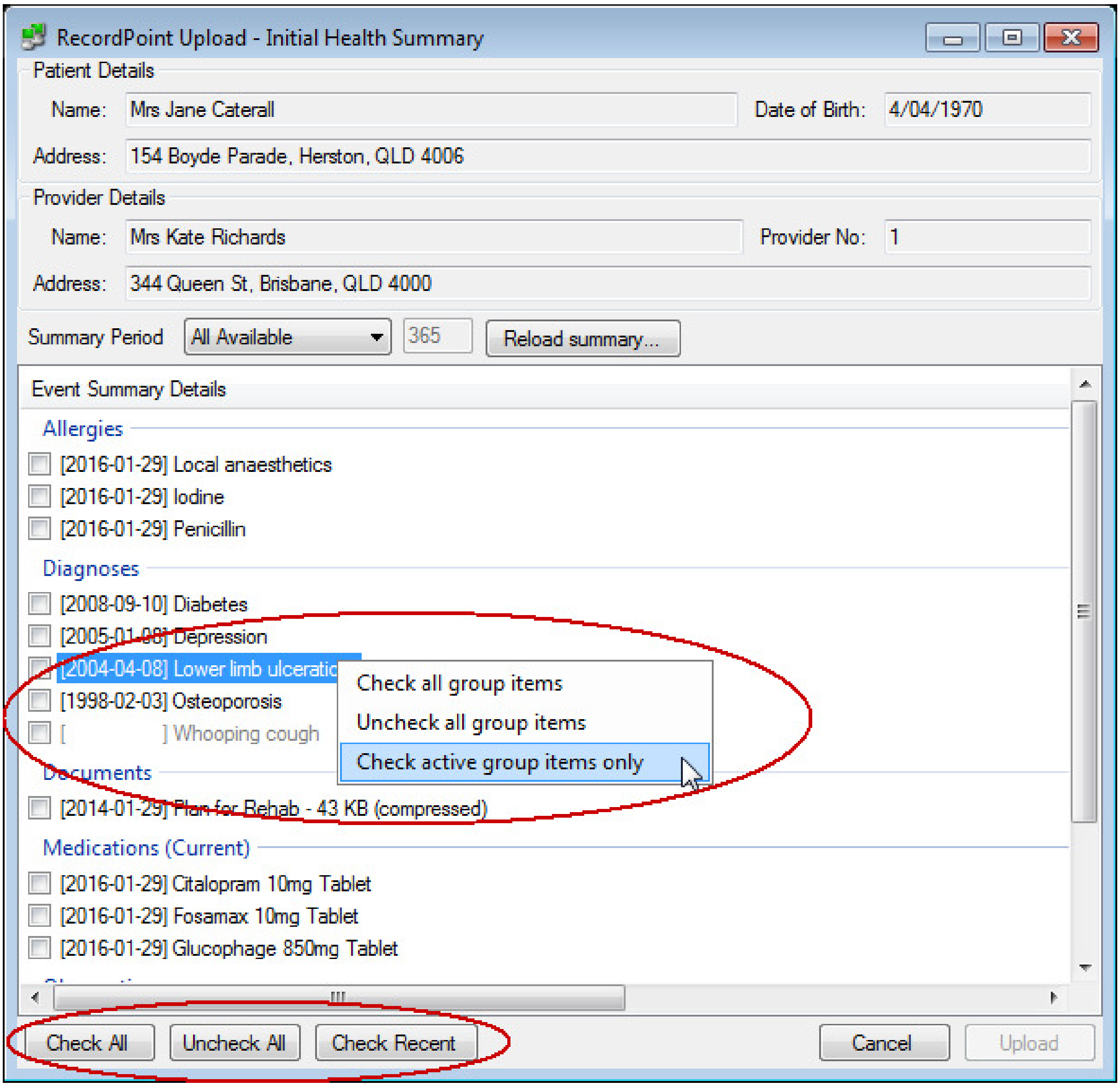

Figure 52: Upload Checking Multiple Items

When multiple items are selected, checking one of the checkboxes will check all the selected items and unchecking one of the checkboxes will uncheck all of the selected items.

An entire group can be included into the upload by right-clicking on an item in the group and selecting ***Check all group items***. To uncheck an entire group, right-click on an item in the group and select the ***Uncheck all group items*** option.

Click the ***Check All*** button to check all the items for upload. Click the ***Uncheck All*** button to uncheck all the items.

If ***All Available*** items have been extracted and shown on the upload form, the ***Check Recent*** button will be available. This button will automatically check all of the items within a specified period, for example the last 5 years. The user may then review the items for relevance knowing that checked items are within the specified period and unchecked items are older. The period used is specified as a preference and defaults to 5 years.

5.9.4 Inactive or Resolved Items

Any items that are recorded as inactive or resolved in the Local Clinical System will be shown greyed out. They can still be selected for upload. To select all the active items and unselect all the inactive items, right-click on an item in the group and select the ***Check active group items only*** option.

5.9.5 Show Item Details

Hovering the mouse cursor above an item will display more details in a popup balloon if they are available.

5.9.6 Items Unsuitable for Upload

Items in the ***Pathology*** and ***Documents*** group can be shown as greyed out when the item is not suitable for upload. In this case the unsuitable item cannot be checked. Look for options on the right-click menu for the item that may be able to correct the issue and allow the item to be checked for upload.

For ***Pathology*** tagged with **Invalid Data**, choose the right-click menu to ***Replace Invalid Data*** to correct the item so it can be checked for upload.

For ***Documents*** with an unsupported extension, the document must be converted to a supported format which is then stored in the Local Clinical System before it can be uploaded.

5.9.7 Overriding Document Subject

The ***Subject*** of ***Documents*** can be changed on the upload form. This will allow the document to be identified in the Patient's Shared Health Record as belonging to one of the categories in the pre-set list. For example, a view showing all the Care Plans together.

To change the Subject, right-click the document item and select the required category from the ***Change Document Subject*** sub-menu, as shown in Figure 53.

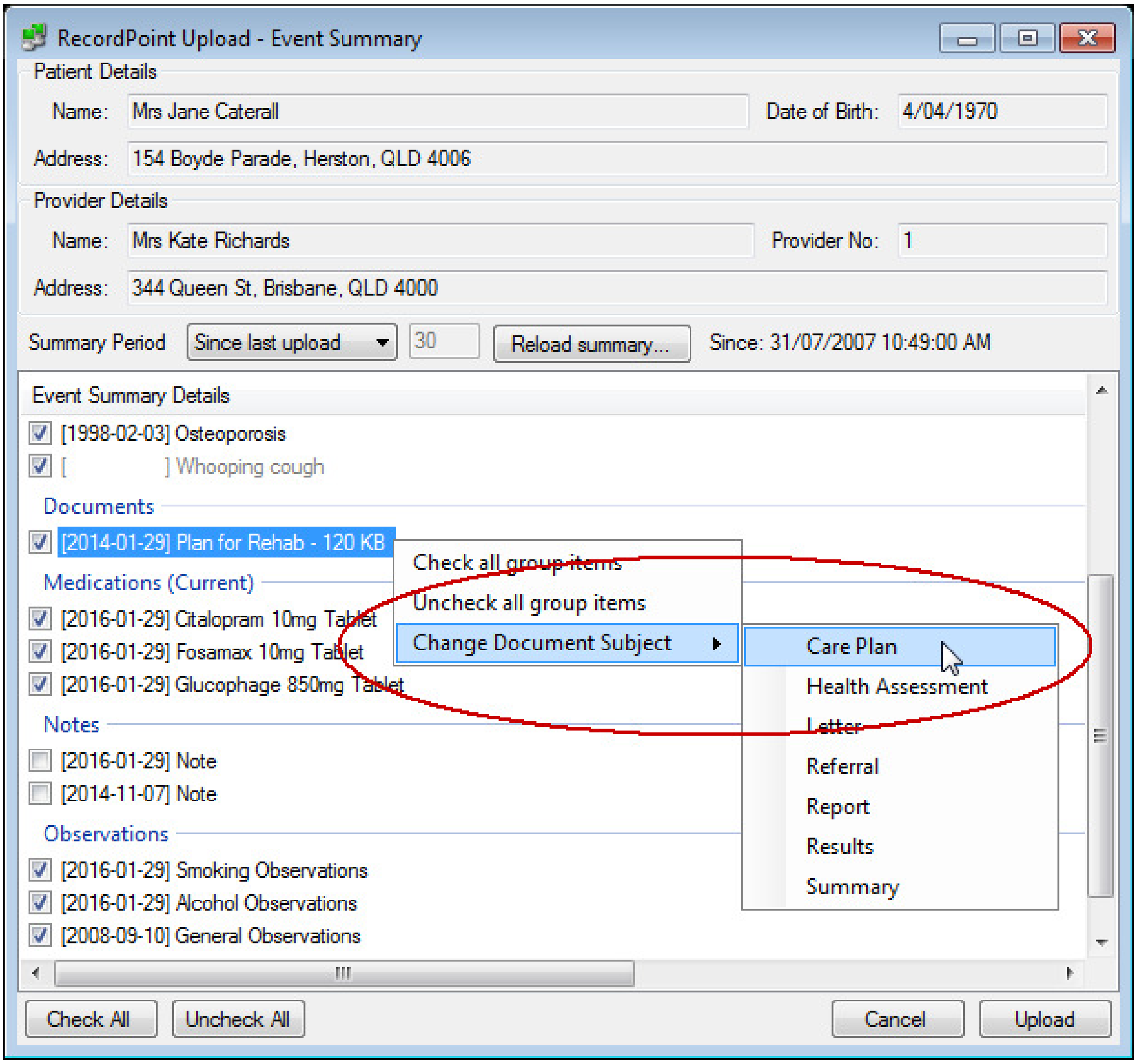

Figure 53: Upload Override Subject

This will not affect the Subject stored in the Local Clinical System, it will only change what is stored in the Shared Health Record.

If the ***Change Document Subject*** sub-menu is not shown, it has not been configured on the RecordPoint server and is not available for use.

5.9.8 Preload Checked Documents Option

Extracting lots of ***Documents*** from the Local Clinical System can take a long time, especially if they are large. Unless most of the documents are checked for upload then significant time and effort is wasted.

To improve the response of the upload form and avoid unnecessary extraction of large amounts of data from the Local Clinical System, the upload form will not pre-load the contents of documents. This is done by default for the Initial Health Summary upload, or if ***All Available*** items have been extracted for the Event Summary upload. This can be changed in ***Upload Settings***, see section 3.3.2.

The content of any checked documents will be automatically retrieved prior to uploading them to the Patient's Shared Health Record.

Unfortunately some details about the document cannot be determined unless the content is retrieved. For example the actual size of the document.

During the automatic retrieval of document content, after the upload form has closed, RecordConnect may identify documents that are unsuitable for upload. In this case it will redisplay the upload form with the affected documents unchecked. The affected documents can be reviewed. To continue with the upload click the ***Upload*** button.

The user can manually trigger the content retrieval of checked documents by right-clicking a document item and selecting the ***Preload checked documents*** option, as shown in Figure 54.

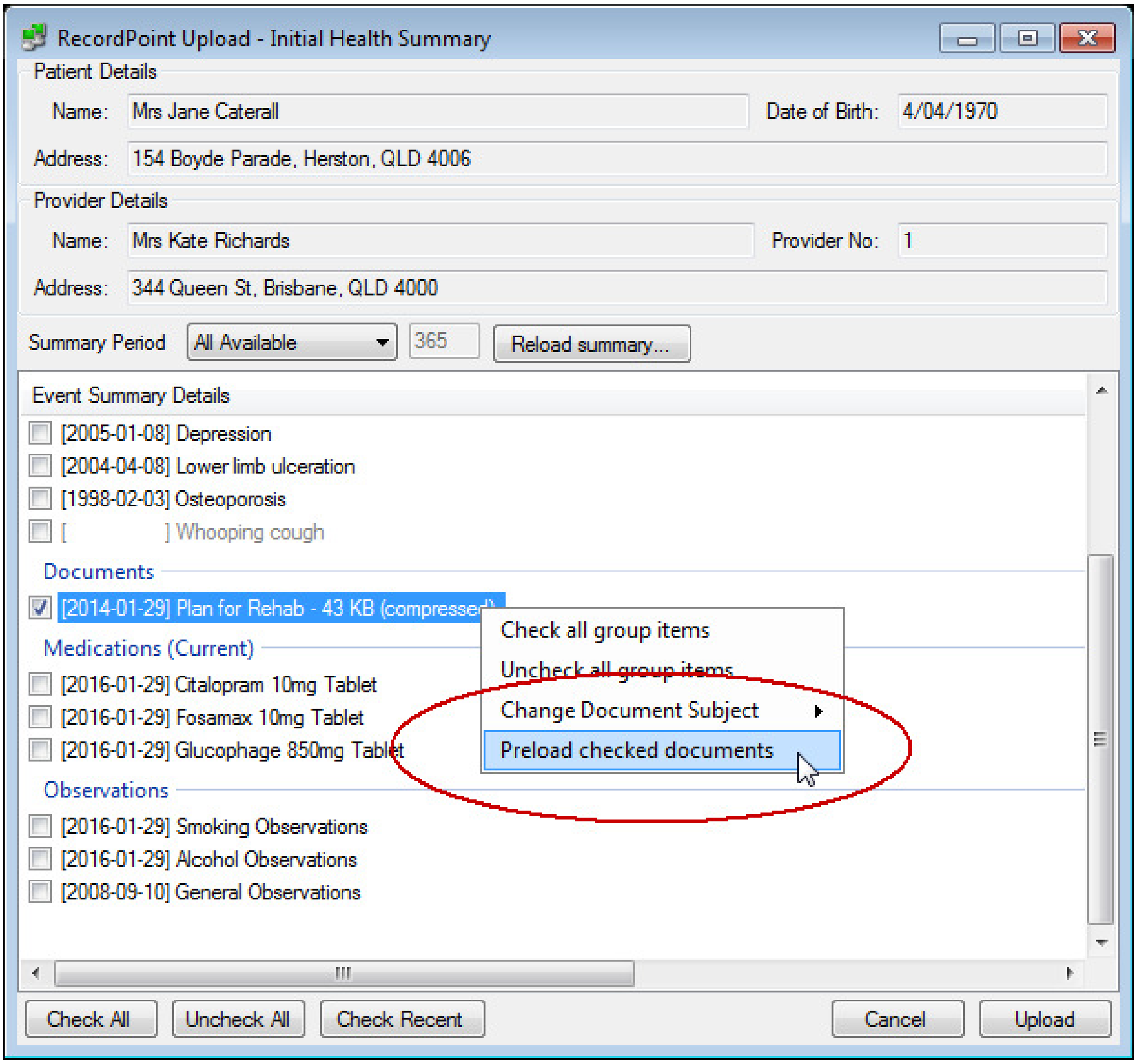

Figure 54: Upload Preload Document

This can be done prior to clicking the ***Upload*** button to verify that the checked documents are ok. Note that the content of unchecked documents cannot be retrieved, they must be checked first.

6 Usage – Prompts

The prompts module in RecordConnect can be used to analyse the local patient's record to provide reminders and recommendations, and/or to link with external internet resources targeted for the patient.

The function of the prompts module is controlled via the settings, see Section 3.5. If any of the automatic options are set, the prompt module will trigger at the specified times. If the balloon tips options are set the user will see any balloons that have been configured to highlight important reminders and recommendations. The balloon tips are a summary of the finding. Clicking on the balloon will open the details window showing more information on the analysis.

If the automatic options and balloon tips are not set, the user can manually access the prompts module via the context menu.

Note: The Prompts module is optional and dependent on the service being provided and available. To enquire on the availability of the Prompts module, please contact the organisation who provided access to RecordConnect or Extensia on 07 3292 0222, or enquiries@extensia.com.au.

To manually access the Prompts module, click the ***Run Paths*** menu item in the context menu as shown in Figure 55.

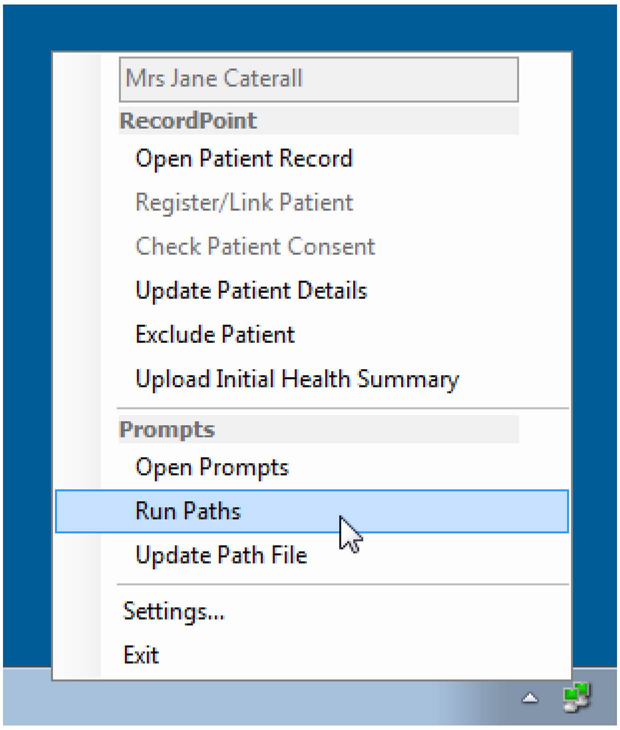

Figure 55: Run Paths Menu

RecordConnect will run the configured logic. The logic that is used is the file that has been previously downloaded from a service as specified in the settings. See Section 3.5.2. If the patient record triggers any balloon tips, and the option is set, they will be shown as in Figure 56.

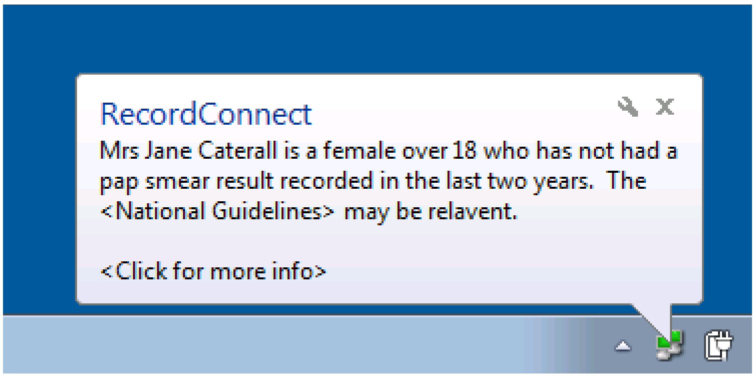

Figure 56: Prompt Balloon tip

Clicking on the balloon will open the details window to show more information, as shown in Figure 57.

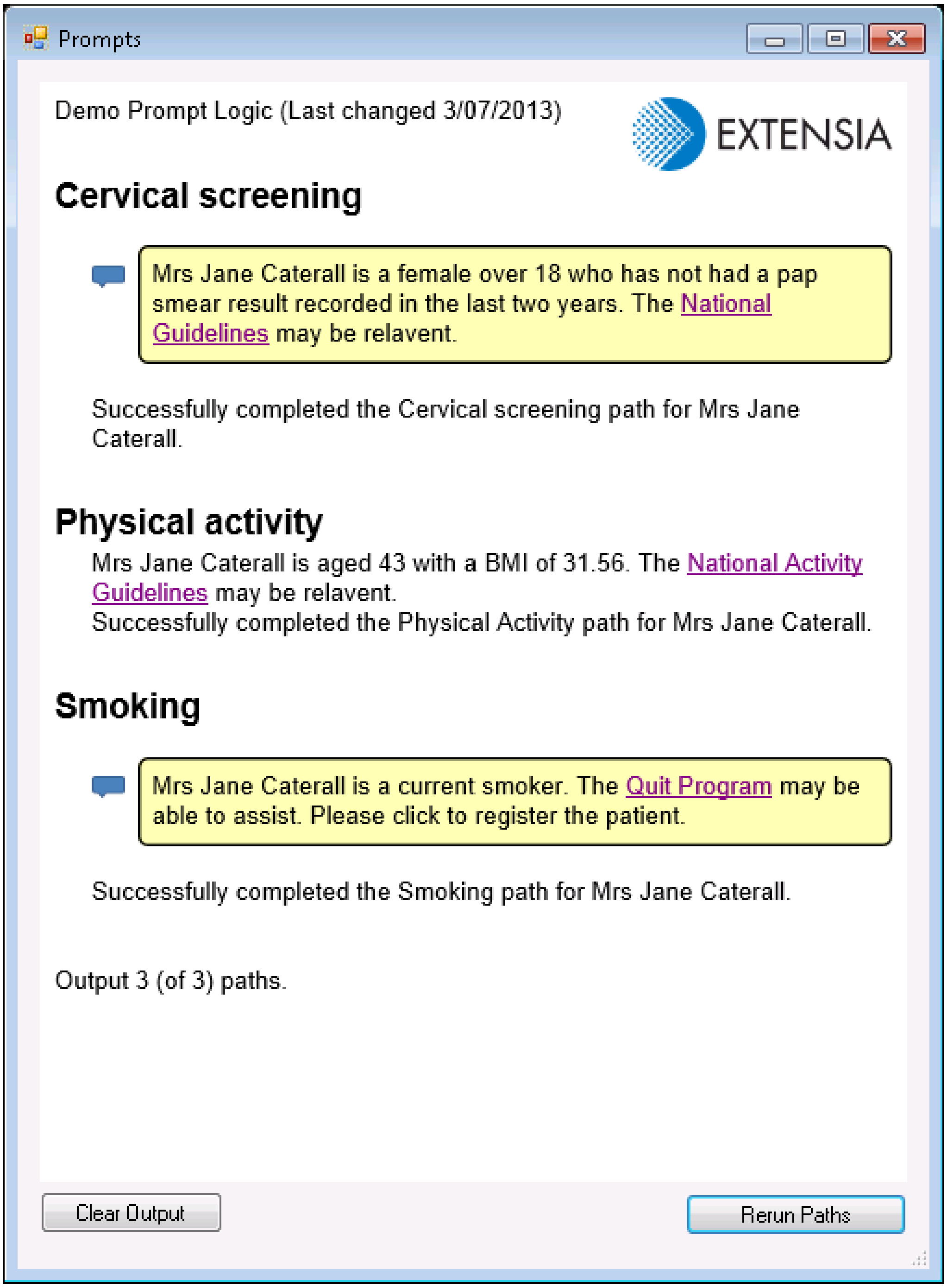

Figure 57: Prompt Details Window

Any internet links that are shown in this window can be clicked to access that page. The content will be shown in a separate browser window.

If the Collapsed View option is set (See Section 3.5.5) the details window will appear as shown in Figure 58.

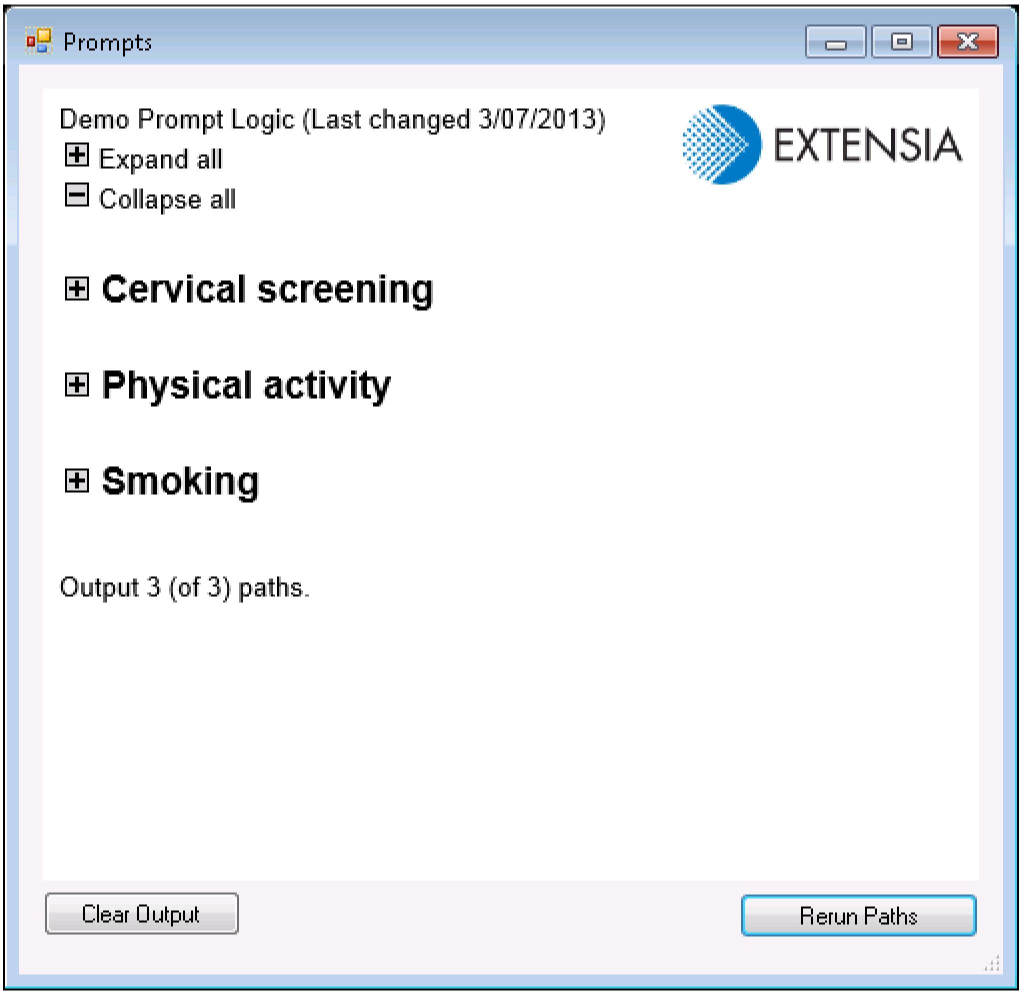

Figure 58: Prompt Collapsed View

Click on the plus and minus icons to expand and collapse the details in the window. This view is useful if there are a large number of paths configured or if the user typically only wants to see the details on selected paths.

To open up the details window manually at any time, click the ***Open Prompts*** menu item as shown in Figure 59.

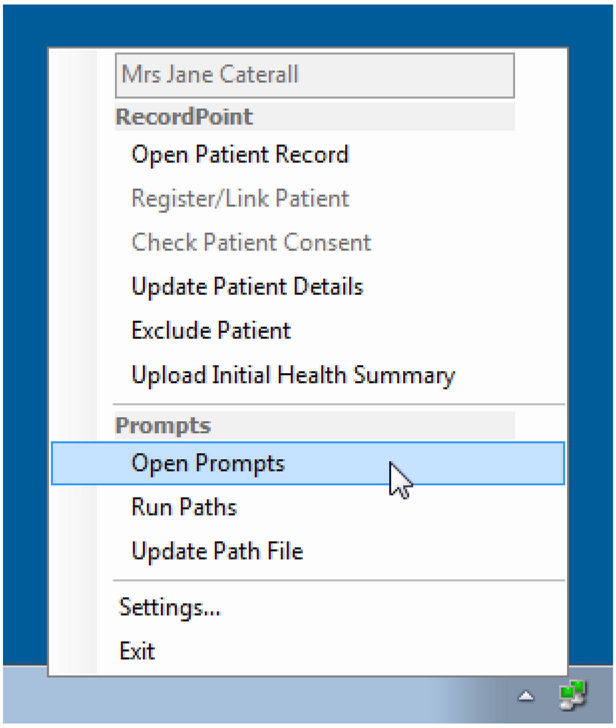

Figure 59: Open Prompts Menu

Normally RecordConnect will keep the path configuration up to date. If for any reason the user wishes to check this manually, click the ***Update Path File*** menu item as shown in Figure 60.

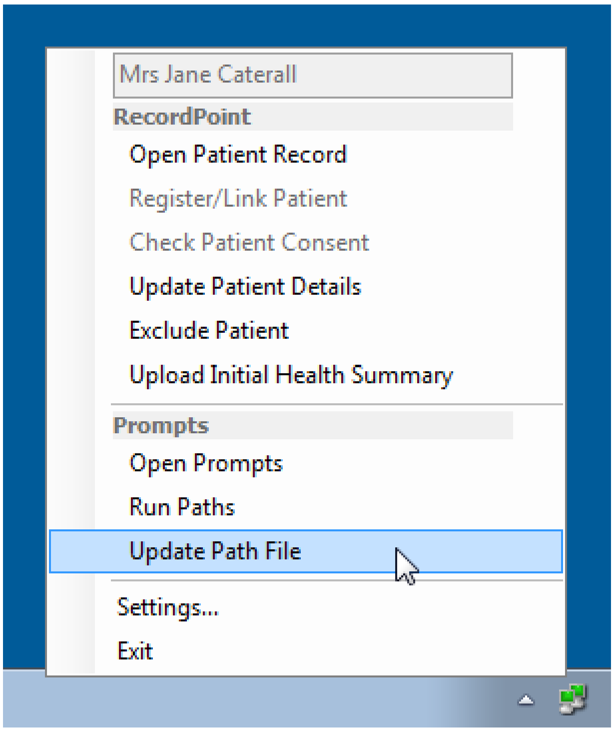

Figure 60: Update Path File Menu

7 Resolving Issues

7.1 Upload Error Recovery

To upload clinical data to the Shared Health Record, RecordConnect formats the selected clinical data into a HL7 message that is stored in the ***Upload Directory*** configured in section 3.1.1.

If the HL7 message is successfully uploaded to the Shared Health Record, it will either be deleted from the ***Upload Directory*** or moved to the ***success*** sub-directory, depending on the ***Keep Sent Messages*** setting, see section 3.3.2.

If the HL7 message fails to be stored in the Shared Health Record, for example due to connectivity issues or the server is unable to process the message, the HL7 message is moved to the ***failure*** sub-directory.

Any messages found by RecordConnect in the ***Upload Directory*** will be automatically resent to the Shared Health Record, either when restarting or the next time an Event Summary is manually uploaded to the server.

To manually re-send a failed message, (that has been moved to the ***failure*** sub-directory), simply move it back into the ***Upload Directory*** and restart RecordConnect.

7.2 RecordConnect Version Number

The RecordConnect version number can be displayed by moving the mouse over the RecordConnect icon in the Windows icon tray. Hover text displaying the version will be displayed as shown in Figure 61.

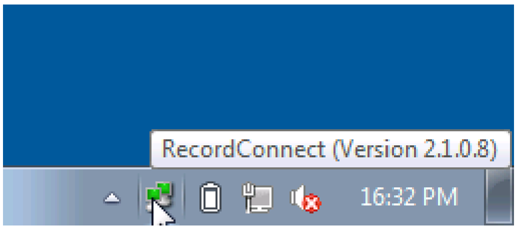

Figure 61: RecordConnect Version Number

Annex A - Definitions

A number of terms that are used throughout this document are explained below.

A.1 Definitions

Term	Description
Agent	is a person who is not a patient, for example Provider or Registration Officer.
Patient	is a person who is receiving health care.
Event Summary	is a set of information related to a single Patient to be contributed to their shared health record as a logical unit. A logical unit is usually related to a single healthcare event, but may also be a history.
Local Clinical Record	is an electronic health record kept to meet the specific needs of a location.
Location	is an identifiable entity that has been issued with a Medicare Australia Location certificate. A Location is typically only related to a single administrative entity, such as a general practice, a clinic or a cell within a large hospital.
National Shared Health Record	is an electronic health record that is Patient centric and available to selected Providers nationally.
Community Shared Health Record	is an electronic health record that is Patient centric and available and suitable for contribution by all Providers in a community that provide care to a Patient, regardless of which organisation they work for or where they are located. The community shared health record bridges the gaps between the national shared health record and the local clinical record by meeting the specific needs of the members of the community.
Location Certificate	is a certificate issued by a Public Key Infrastructure (PKI) authority that verifies and authenticates the validity of a location involved in an internet transaction.