

**HL7 EHR Work Group**

**Personal Health Record  
System Functional Model,  
Release 1  
Draft Standard for Trial Use  
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**Chapter Four:  
Supportive Functions**

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## Table of Contents

<b>1 Example</b>	3
<b>2 Actors</b>	3
<b>3 The “Manage Hierarchy”</b>	3
<b>4 PHR Account Holder Privacy</b>	4
<b>5 Functionality Versus Implementation</b>	5
<b>6 Functional Outline</b>	5
S.1 (Provider Management)	6
S.1.1 (Manage Selection of Providers)	6
S.1.2 (Manage Account Holder’s Provider Information)	6
S.1.3 (Manage Health Care Provider Information)	7
S.1.4 (Manage Provider Transparency Information)	8
S.1.5 (Manage Healthcare Facility Information)	8
S.1.6 (Manage Healthcare Facility Transparency Information)	8
S.1.7 (Manage Surveys on the Healthcare Experience)	9
S.2 (Financial Management)	10
S.2.1 (Capture and Read Health Insurance Health Insurance Account and Benefit Information)	10
S.2.2 (Manage Health Insurance Plan Benefit Information)	10
S.2.3 (Manage Standard Reporting)	12
S.2.4 (Manage Ad Hoc Query and Report Generation)	12
S.3 (Administrative Management)	13
S.3.1 (Manage Account Holder Demographics)	13
S.3.2 (Manage PHR Conditions of Use)	14
S.3.3 (Manage Legal and other Related Documents)	14
S.3.3.1 (Manage Consents and Authorizations)	15
S.3.3.2 (Manage End-of-Life Documents)	15
S.3.3.3 (Manage Documents for Personal Representation)	16
S.3.4 (Manage Data Masking for Sensitive or Selective Information)	16
S.3.5 (Manage PHR Output)	17
S.3.6 (Manage PHR Data Import and Export)	17
S.3.7 (Manage Secondary Use Requests)	18
S.3.8 (Manage Requests for Release of Information)	18
S.3.9 (Manage Information View)	19
S.4 (Other Resource Management)	20
S.4.1 (Manage Clinical Research Information)	20
S.4.1.1 (Capture Genomic/Proteomic Data and Documentation from External Clinical Sources)	20
S.4.1.2 (Manage De-Identified Data Request Process)	21
S.4.1.3 (Manage Member Notification of Clinical Trials)	21
S.4.1.4 (Manage Enrollment in Clinical Trials or Research)	22
S.4.2 (Registry Notification and Management)	22
S.4.3 (Manage Donor Information)	23
S.4.4 (Manage Account Holder Education Material Updates)	23
S.4.5 (Manage Account Holder Reminder Information Updates)	23
S.4.6 (Manage Public Health Information)	24
S.4.6.1 (Manage Public Health Related Updates)	24
S.4.6.2 (Manage Access to Public Health Information Resources)	24

S.4.6.3 (Manage Access to Public Health Knowledge Bases)	25
S.4.6.4 (Manage Enrollment in Public Health Programs)	25
S.4.6.5 (Manage Enrollment in Public Health Notices)	25
S.4.6.6 (Manage Enrollment in Public Health Surveys)	26

## Chapter 4: Supportive PHR-S Functions

Supportive PHR-S functions are the subset of PHR-S functions that assist with the administrative and financial requirements associated with the delivery of healthcare. Supportive PHR-S functions also provide input to systems that perform medical research, promote public health, and seek to improve the quality of healthcare delivered.

### 1 Example

For example, Supportive PHR-S functions will allow the PHR Account Holder to electronically query local or national registries, provide the ability to participate in a registry and obtain updates from the registry as to the PHR Account Holder status within that registry.

### 2 Actors

The PHR Account Holder is the principal user of the Supportive PHR-S functions. However, the PHR Account Holder may designate other individuals to perform certain administrative functions on his/her behalf.

### 3 The “Manage Hierarchy”

Within the PHR Work Group, there was an intentional effort to create language consistency in the conformance criteria. The “Manage Hierarchy” diagram below was used to create semantic harmony within the conformance criteria so that, for example, if the Personal Health Chapter has a conformance criteria using the term “nullify”, that term had the same meaning as used in the Supportive Chapter’s conformance criteria.

The levels in the hierarchy are granular and have a parent-child relationship. For example, the diagram below depicts that managing the “Capture” of information comes from an External Source or from an Internal Source. Similarly, under the “Maintain” section of the diagram, the term “Store” could invoke all five verbs listed below it (i.e., Save, Backup, Compact, Encrypt, or Archive). If the parent term is not used, then the respective verbs in the child will be cited individually in the criterion. If the term “Manage” is used, all of the applicable verbs included in the table are encompassed in that criterion. Authors are responsible for determining whether one or more of the subverbs are not appropriate for a given function and must write conformance criteria that constrain the use of the verb hierarchy according to the intent of the profile being created.

<b>MANAGE</b>							
<b>Capture</b>		<b>Maintain</b>				<b>Render</b>	
Input (External)	Create (Internal)	Store	Update	Restrict Access	Remove Access	Read (Internal)	Output (External)
Receive Accept Download Import	Enter Compute Record	Save Backup Compact Encrypt Archive	Edit Correct Amend Augment Annotate Comment Associate Tag	Hide Mask Filter	Obsolete Inactivate Destroy Nullify Purge	View Report Display Access Present	Send Upload Export Synchronize

The hierarchical principle above was applied during the development of the PHR-S FM. Additional terms used in the model are found in the model's Glossary. It is important to be consistent in the terminology used in the PHR-S FM conformance criteria so there is consistent interpretation of the conformance criteria's intent in defining the functionality.

#### **4 PHR Account Holder Privacy**

It is the bias of this model that consumer privacy rights be protected to the fullest extent possible. However, as an international model that attempts to describe functionality for many PHR system sub-types (e.g., integrated PHR/EHR systems, stand-alone PHR systems, or vendor-provided Web-based systems), statements concerning consumer control over information are frequently tempered by the phrase (with some variations) "in accordance with user role, organizational policy, or jurisdictional law." This phrase does not extend license to institutions to violate individual rights, but acknowledges that legitimate exceptions may exist to the general rule of PHR Account Holder control over PHR-S information. In all cases, the model requires that the privacy policy of a PHR system be fully transparent to PHR Account Holders, and that a PHR-S has the ability to capture a PHR Account Holder's consent on how his or her personal information may be used and disclosed (see functions in IN.3.8, Patient Privacy and Confidentiality for additional detail.)

#### **5 Functionality Versus Implementation**

It is important to note that many functions provide the capacity for functionality (e.g., provide for standards-based interoperability), but do not give implementation details. A function, when implemented, must be implemented within the context of the entire PHR-S FM. For example, implementation of many functions throughout the model are expected to conform to the security and audit functions found within IN.3 (Security) and IN.4 (Auditable Records), and functions performed "by the PHR Account Holder" may be actually performed by others as delegated by the PHR Account Holder (see IN.3.2, Entity Authorization).

**6 Functional Outline – Supportive**

<b>Supportive</b>	S.1	Provider Management
	S.2	Financial Management
	S.3	Administrative Management
	S.4	Other Resource Management

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
S.1	H	Provider Information	<b>Statement:</b> The purpose of this section is to provide the system support to obtain a list of providers in an area and/or within a health plan panel and then maintain, or provide access to, current provider information.				1
S.1.1	F	Manage Selection of Providers	<p><b>Statement:</b> Support a PHR Account Holder in seeking providers who may meet their healthcare requirements.</p> <p><b>Description:</b> In seeking healthcare, the system should support the PHR Account Holder being able to obtain a list (s) of providers by geographic area and/or within a dental or medical plan panel. Further, the PHR Account Holder should be able to sort providers by attributes including, but not limited to specialty, office hours, gender and language. The PHR Account Holder should be able to maintain, or provide access to, current provider information. A PHR Account Holder may desire to research because of a planned household relocation to another geographic area, a diagnosis requiring highly specialized care by healthcare providers and or healthcare facilities that are in limited availability. The system should be flexible on alternative sources of information allowing the PHR Account Holder to review providers who might best meet the individual's needs.</p>		S.1.4	<ol style="list-style-type: none"> <li>The system <b>SHOULD</b> provide the ability to access multiple sources of healthcare provider and healthcare system information.</li> <li>The system <b>SHOULD</b> provide the ability to search on more than one or more provider attributes simultaneously.</li> <li>The system <b>MAY</b> provide the ability to search the available health benefit plan provider panel based on one or more attributes.</li> <li>The system <b>MAY</b> provide the ability to compare a chosen provider to the health plan provider panel in order to determine in or out of network benefits.</li> <li>The system <b>SHALL</b> capture the provider contact/business information.</li> <li>The system <b>SHALL</b> display the provider contact/business information.</li> <li>The system <b>MAY</b> provide the ability to capture provider participation in payer networks.</li> <li>The system <b>MAY</b> provide the ability to capture provider participation in payer benefit plan products.</li> <li>The system <b>MAY</b> provide the ability to capture a healthcare provider privilege status at a healthcare facility.</li> <li>The system <b>MAY</b> provide the ability to verify healthcare provider credentials.</li> </ol>	2 3 4 5 6 7 8 9 10 11
S.1.2	F	Manage PHR Account Holder Provider's Information	<p><b>Statement:</b> Manage contact information for the PHR Account Holder's current and past health care providers.</p> <p><b>Description:</b> A system should maintain both</p>			<ol style="list-style-type: none"> <li>The system <b>SHALL</b> provide the ability to capture PHR Account Holder provider contact information.</li> <li>The system <b>MAY</b> have the ability to capture background information about and for the PHR Account Holder's providers.</li> </ol>	12 13

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>current and past contact information about a provider. The system may also collect and maintain background information about a provider such as academic credentials, certifications and specialties. Healthcare providers may be individuals, teams, or organizations such as clinics.</p> <p>The system should allow the PHR Account Holder to manage information regarding teams of providers. A team of providers may be a group of healthcare physicians practicing in the same healthcare facility. For example, a primary care provider, an orthopedic specialist, physiatrist and physical therapy may comprise a team at a facility during a acute hospitalization. A team of providers could also be designated by the PHR Account Holder based on a disease process. For example, in the case of extended care after a motor vehicle accident with extreme facial injury, the team may be comprised of a dentist, an orthodontist, a maxillo-facial specialist, and orthopedist, a reconstructive specialist and a chiropractor.</p> <p>These healthcare providers may not be part of a healthcare facility, but all may be instrumental in the complete care of the individual, requiring coordination by the PHR Account Holder.</p>			<p>3. The system <b>SHOULD</b> provide the ability to maintain contact and background information about the providers as part of the PHR Account Holder record.</p> <p>4. The system <b>SHALL</b> provide the ability to track updates of contact and background information.</p> <p>5. The system <b>SHALL</b> retrieve provider contact/business information as part of the PHR Account Holder record.</p> <p>6. The system <b>MAY</b> provide the ability to identify providers as part of an existing provider defined care team(s).</p> <p>7. The system <b>SHOULD</b> provide the ability to capture information necessary to identify primary and secondary practice locations or offices of providers to support communication and access.</p> <p>8. The system <b>MAY</b> provide the ability to capture and output provider's scheduled work hours at each location.</p> <p>9. The system <b>MAY</b> provide the ability to identify providers as part of the PHR Account Holder's team(s).</p> <p>10. The system <b>MAY</b> provide the ability to update healthcare provider credentials.</p> <p>11. The system <b>MAY</b> provide the ability to designate the provider as active or previous/past member of the PHR Account Holder care team.</p>	<p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p>
S.1.3	F	Manage Health Care Provider Information	<p><b>Statement:</b> Support the import or retrieval of data necessary to identify a healthcare provider.</p> <p><b>Description:</b> This information will assist the PHR Account Holder in contacting a provider to schedule appointments and ask health-related questions. The provider roles</p>		S.3.4	<p>1. The system <b>SHOULD</b> provide the ability to input or create information regarding a provider's location or contact information regarding a facility's premises.</p> <p>2. The system <b>SHOULD</b> provide the ability to add, update, or inactivate information regarding a provider's location or contact information regarding a facility's premises, so that it is current.</p>	<p>23</p> <p>24</p>

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			include, but are not limited to, physician, nurse and physical therapist.			3. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to restrict another person's or entity's ability to read selected elements of the provider's identifying information, subject to the PHR Account Holder's authorization.	25
S.1.4	F	Manage Provider Transparency Information	<p><b>Statement:</b> Support the import or retrieval of data necessary to review available quality, performance, and cost measurements regarding providers.</p> <p><b>Description:</b> A variety of stakeholders offer consumers the ability to evaluate the credentialing, quality, performance, and cost. Having ready access to the information will assist the consumer in their evaluation and selection of providers.</p>		S.1.1 S.1.2	1. The system <b>SHOULD</b> provide the ability to import or retrieve healthcare facility data required to assess health care quality, performance and cost.	26
						2. The system <b>SHOULD</b> provide the ability to read the imported information.	27
						3. The system <b>SHOULD</b> provide the ability to store and retrieve the imported information.	28
S.1.5	F	Manage Healthcare Facility Information	<p><b>Statement:</b> Support the import or retrieval of data necessary to identify a healthcare facility.</p> <p><b>Description:</b> This information will assist the PHR Account Holder in identifying where a facility is located and in contacting a facility to schedule appointments. These facilities may be local or remote from the PHR Account Holder. The facility types include, but are not limited to, hospitals, clinics, same day surgery centers.</p>			1. The system <b>SHOULD</b> provide the ability to input or create information on facility location or contact information on a facility's premises.	29
						2. The system <b>SHOULD</b> provide the ability to add, update, or inactivate information on facility's location or contact information on a facility's premises.	30
S.1.6	F	Manage Healthcare Facility Transparency Information	<p><b>Statement:</b> Support the import or retrieval of data necessary to review available quality, performance, and cost measurements regarding healthcare facilities.</p> <p><b>Description:</b> A variety of stakeholders offer consumers the ability to evaluate the quality, performance, and cost. Having ready access to the information will assist the consumer in their evaluation and selection of healthcare facility.</p>			1. The system <b>SHOULD</b> provide the ability to import or retrieve healthcare facility data required to assess health care quality, performance and cost.	31
						2. The system <b>SHOULD</b> provide the ability to read the imported information.	32
						3. The system <b>SHOULD</b> provide the ability to store and retrieve the imported information.	33

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
S.1.7	F	Manage Surveys on the Healthcare Experience	<p><b>Statement:</b> Enable the PHR Account Holder to respond to surveys on his or her healthcare experience.</p> <p><b>Description:</b> This feature would enable providers, payers and PHR Account Holders to assess and provide feedback on areas such as the perceived patient-centeredness of care, satisfaction and performance, and the transparency efforts to improve quality of care. The receipt of a health survey does not imply that the member must participate in the survey. The system may simply direct the PHR Account Holder to a separate, external survey tool, or may provide the capacity to manage the entire survey process in which a member chooses to participate.</p>			1. The system <b>SHOULD</b> provide the ability to inform the PHR Account Holder that a survey is available.	34
						2. The system <b>SHOULD</b> provide the ability to direct the PHR Account Holder to the survey.	35
						3. The system <b>MAY</b> provide the ability to capture the results of PHR Account Holder survey responses from external survey tools.	36
						4. The system <b>MAY</b> provide the ability to create a survey to capture PHR Account Holder responses.	37
						5. The systems <b>MAY</b> provide the ability to manage the survey results.	38
						6. The system <b>MAY</b> provide the ability for the PHR Account Holder to unsubscribe to surveying.	39
S.2	H	Financial Management	<p><b>Statement:</b> The purpose of this section is to provide the system support in managing financial information related to benefit plan coverage and service utilization.</p>				40
S.2.1	F	Capture and Read Health Insurance Account and Benefit Information	<p><b>Statement:</b> Enable the PHR Account Holder to request and/or receive and read information on their general health insurance benefits.</p> <p><b>Description:</b> PHR Account Holders may want to centralize administrative information related to the insurance accounts that he/she participate in. Administrative information such as group, group number, policy number, member identification number, effective and termination dates, probationary periods, pre-existing condition constraints, prior authorization or referral requirements and others are important data</p>			1. The system <b>SHOULD</b> provide the ability to capture health insurance benefit information.	41
						2. The systems <b>SHOULD</b> provide the ability for the PHR Account Holder to read the health insurance benefit information.	42
						3. The system <b>SHOULD</b> provide the ability to support multiple payer sources of health insurance benefits information.	43

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>for provider offices for billing purposes. Current and prior insurance coverage information is important for correct billing and payment. Detail of multiple coverages allows for coordination of benefits information to be easily provided.</p> <p>The ability to capture information of separate riders such as extra major medical coverage or cancer specific coverages in addition to routine benefit plans assists the PHR Account Holder in better knowledge and utilization of the financial resources available for payments. The system should allow the PHR Account Holder to display patient responsibility and benefit plan covered costs – both estimated and final – for a given event (e.g., test, procedure, surgery or provider appointment).</p> <p>In newer plan types such as Consumer Directed Health Plans (CDHP), this information will help the PHR Account Holder determine the financial implications of his/her treatment options, alternative treatment options and provide information that may be needed by the provider.</p>			<p>4. The system <b>SHOULD</b> allow the insurance type (e.g., medical or dental) to be specified.</p> <p>5. The system <b>SHOULD</b> provide the ability to capture insurer(s) contact information.</p> <p>6. The system <b>MAY</b> provide the ability for a PHR Account Holder to display estimated patient responsibility and insurance covered costs for an event.</p> <p>7. The system <b>SHOULD</b> provide the ability for a PHR Account Holder to display final patient responsibility and insurance determination for an event.</p> <p>8. The system <b>SHOULD</b> provide the ability to track multiple categories of account distributions related to the varied financial implications of funds usage in CDHP accounts.</p>	<p>44</p> <p>45</p> <p>46</p> <p>47</p> <p>48</p>
S.2.2	F	Manage Health Insurance Plan Benefit Information	<p><b>Statement:</b> Enable the PHR Account Holder to capture, read, update and remove access to health insurance benefit information including but not limited to past, current and future (if known) benefit plans.</p> <p><b>Description:</b> Robust management features allow the PHR Account Holder to actively maintain their health insurance benefits information for selected benefits related to PHR Account Holder coverage needs. Over an extended period of time, with the likelihood of multiple insurance providers, it may be important for there to be information management capability for the varied payer</p>			<p>1. The system <b>SHOULD</b> provide the ability to allow the PHR Account Holder to capture selected insurance benefit information that is pertinent to the PHR Account Holders needs.</p> <p>2. The system <b>SHOULD</b> provide the ability to maintain the selected health insurance benefit information.</p>	<p>49</p> <p>50</p>

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>sources, varied levels of benefit information, and varied levels of coverage including allowed coverages, exclusions, limitations on specific coverages.</p> <p>Administrative data should be captured through PHR Account Holder data entry or electronically through data importing. Updating of information should be manual or electronic. If data is available electronically, the PHR Account Holder should have the ability to determine which data will be added or updated. The PHR Account Holder should have the ability to edit data entered by the PHR Account Holder with an audit trail of those changes if the PHR Account Holder so desires. The PHR Account Holder should have the ability to edit data entered from other sources, but with a permanent audit trail of changes made to non-PHR Account Holder originated data. For instance if the PHR Account Holder changes data that originated from a dentist office, that change would be reflected in an audit trail.</p> <p>Several important features set accounts like CDHPs apart from traditional health insurance coverage. And warrant special system features and operations considerations: 1) rollover of balances to successive years, 2) portability of accumulated HSA balances, 3) possible tax advantages. These special CDHP attributes mean there will be system and data sharing implications for related financial models, CDHP consumer advisory services, and consumer choice for both medical services and the investment decision for "surplus" discretionary contributions.</p>			<p>3. The system <b>SHOULD</b> provide the ability to track updates made to selected plan benefit information.</p> <p>4. The system <b>SHOULD</b> provide the ability to manage multiple payer sources of health insurance benefit information.</p> <p>5. The system <b>SHOULD</b> provide the ability to manage multiple categories of account distributions which may be related to the varied financial implications of funds usage in accounts (such as Community Directed Health Plans).</p> <p>6. The system <b>MAY</b> provide the ability to capture preauthorization requirements for medications and health services specific to the PHR Account Holder's policies.</p> <p>7. The system <b>MAY</b> provide the ability to capture referral requirements for health care providers.</p>	<p>51</p> <p>52</p> <p>53</p> <p>54</p> <p>55</p>

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
S.2.3	F	Manage Standard Reporting	<p><b>Statement:</b> Enable authorized PHR Account Holders or designees to request and read pre-configured, packaged reports of PHR information.</p> <p><b>Description:</b> PHR Account Holders may request standard, pre-configured, packaged reports. The purpose is not for PHR interchange but rather for PHR Account Holder's analysis of his/her health related financial and administrative data, and for sharing of the PHR information for any purposes the PHR Account Holder deems appropriate.</p>			1. The system <b>SHOULD</b> provide the ability to generate printer friendly standard reports of structured clinical and administrative and financial data using either internal or external reporting tools.	56
						2. The system <b>SHOULD</b> provide the ability to specify report parameters based on PHR Account Holder demographic and/or clinical data which would allow sorting and/or filtering of the data.	57
						3. The system <b>MAY</b> provide the ability to include information from unstructured clinical and administrative data in the report generation process using internal or external tools.	58
						4. The system (or an external application using data from the system) <b>MAY</b> provide the ability to save report parameters for generating subsequent reports.	59
						5. The system (or an external application using data from the system) <b>MAY</b> provide the ability to modify one or more parameters of a saved report specification when generating a report using that specification.	60
S.2.4	F	Manage Ad Hoc Reporting	<p><b>Statement:</b> Allow authorized PHR Account Holders or designees to request and read ad hoc reports of PHR information.</p> <p><b>Description:</b> PHR Account Holders may request ad hoc, non-standard reports. The purpose is not for PHR interchange but rather for PHR Account Holder's analysis of his/her health related financial and administrative data, and for sharing of the PHR information for any purposes the PHR Account Holder deems appropriate.</p>	PH.2.4		1. The system <b>SHOULD</b> provide the ability for the authorized PHR Account Holder to create ad hoc reports of the PHR.	61
						2. The system <b>SHOULD</b> provide the ability for the authorized PHR Account Holder to create customized reports of summarized information based on sort and filter controls for date or data range, problem, or other clinical data element or categories (e.g., medications or providers).	62
						3. The system <b>SHOULD</b> provide the ability to save the ad hoc reports for future retrieval and use.	63
						4. The system <b>SHOULD</b> provide the ability to maintain summarized information through customized reports based on prioritization of chronology, problem or other pertinent information of importance to the authorized PHR Account Holder.	64

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
						5. The system <b>SHALL</b> provide the ability to create reports that prohibit other Account Holders (e.g., providers, caregivers, or payers) from accessing certain information.	65
						6. The system <b>MAY</b> provide the ability to produce consolidated reports across family members (e.g., children).	66
						7. The system <b>SHOULD</b> conform to IN.3.2 (Entity Authorization).	67
						8. The system <b>SHALL</b> conform to IN.4 (Auditable Records).	68
<b>S.3</b>	<b>H</b>	<b>Administration Management</b>	<b>Statement:</b> The purpose of this section is to provide the system support in managing the PHR-S and the interaction with other PHR and EHR systems. It also serves as a set of functions to manage documentation related to the PHR-S as well as legal documents that affect or may affect the PHR Account Holder.				69
S.3.1	<b>F</b>	Manage Interoperability of PHR Account Holder Demographics	<b>Statement:</b> Support the ability to capture or have interactions with other systems, applications and modules to enable the creation and maintenance of demographic information.  <b>Description:</b> The PHR Account Holder demographic data set is needed to support identification and to enhance the prospect for interoperability. The PHR Account Holder should be able to request or make changes to their demographic data and allow for export of all or parts of the demographic data to other systems.	PH.1.2		1. The system <b>MAY</b> provide the ability to add and update demographic information through interaction with other systems, applications and modules.	70
						2. The system <b>MAY</b> provide notification to the PHR Account Holder of added and updated demographic changes, as a result of interaction with other systems, applications and modules.	71
						3. The system <b>SHOULD</b> provide the ability for a PHR Account Holder to make requests for maintenance of demographic information.	72
						4. The system <b>SHOULD</b> provide the ability for a PHR Account Holder to make requests to other external systems for maintenance of the PHR Account Holder's demographic information.	73
S.3.2	<b>F</b>	Manage PHR Conditions of Use	<b>Statement:</b> Outline the sponsor requirements for use of the system.  <b>Description:</b> The terms and conditions outline the sponsor requirements in using the application. The terms and conditions may include items such as copyright	IN.3.9		1. The system <b>SHOULD</b> require the PHR Account Holder to agree to a the Conditions of Use when the system is initially used by the PHR Account Holder.	74
						2. The system <b>SHOULD</b> provide periodic reminders to the PHR Account Holder of the Conditions of Use.	75

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>information, trademarks and intellectual property, third party links, indemnification, privacy, limitation of liability, term and termination and other miscellaneous provisions. The PHR Account Holder should be notified of the expectations of the sponsor and have the opportunity to agree to the requirements and any changes to the requirements.</p> <p>The Conditions of Use document also helps indemnify the PHR sponsor against certain misuse of the data. For example, a published article on diabetes may contain a copyright notice that forbids the storage of that article on a computer without first paying for the article. The Conditions of Use document would inform the PHR Account Holder that the sponsor does not support copyright infringement.</p>			<p>3. The system <b>MAY</b> provide the ability to display changes to Conditions of Use.</p> <p>4. The system <b>SHOULD</b> provide the ability to view and print the Conditions of Use.</p> <p>5. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to report to the PHR-S sponsor(s) as part of the process to seek redress for the sponsor 's failure to meet performance expectations as specified in the Conditions of Use agreements.</p>	<p>76</p> <p>77</p> <p>78</p>
S.3.3	H	Manage Legal and other Related Documents	<p><b>Statement:</b> Manage legal and other related documents that allow or restrict the use or disclosure of the PHR Account Holder's information.</p> <p><b>Description:</b> The PHR system should allow for the entry of documents related to the use or disclosure of the PHR Account Holder's information. These documents may include scanned images or electronic images sent via attachment. The system does not judge the authenticity of the document. The PHR Account Holder should ensure they have the original document or approved copy of a document or other images. The system allows for multiple instances of the same document (e.g., multiple authorizations). The system allows for retiring but tracking of documents no long used. The system allows for the removal of documents at the PHR Account Holder's discretion.</p>				79

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S.3.3.1	F	Manage Consents and Authorizations	<p><b>Statement:</b> Maintain Consents and Authorization directives/statements for any entity that may or may not have access to the PHR Account Holder's PHR-S.</p> <p><b>Description:</b> The PHR Account Holder may have Consents and/or Authorization directives that allow or prohibit certain entities from access to part or all of the PHR. Directives may take different forms including documents or system flags on Consent Authorization. The Consent or Authorization requirements would be maintained in accordance with user role, organizational policy and/or jurisdictional law. Based on that, the Consent or Authorization might contain the details of the entity that may be authorized to use, or may be prohibited from using the PHR-S. The Consent or Authorization may detail to the record, field or class, the data available to be used or disclosed. The entities that the Consent or Authorization applies to may or may not be current PHR Account Holders of the PHR-S.</p>	PH.1.5	S.3.6	1. The system <b>SHALL</b> provide the ability to create Consents and Authorizations that are consistent with jurisdictional law.	80
						2. The system <b>SHOULD</b> provide the ability to select the entity to which the Consent or Authorization applies.	81
						3. The system <b>SHOULD</b> provide the ability to define an entity to which the Consent or Authorization applies.	82
						4. The system <b>SHOULD</b> provide the ability to identify a section or sections to which the Consent or Authorizations applies.	83
						5. The system <b>SHOULD</b> provide the ability to identify individual elements of records to which the Consent or Authorization applies.	84
						6. The system <b>SHOULD</b> provide the ability to define the time period within which the Consent or Authorization is enforced.	85
						7. The system <b>MAY</b> provide the ability to export Consents and Authorizations to another PHR-S, an EHR-S, or to print.	86
						8. The system <b>SHOULD</b> provide the ability to capture Consents and Authorizations through electronic interfaces such as scanning or faxing.	87
						9. The system <b>MAY</b> provide the ability to reference external Consents and Authorizations (e.g., in an external EHR-S).	88
S.3.3.2	F	Manage End-of-Life Documents and Other Advance Directives	<p><b>Statement:</b> Manage documents that provide direction for end-of-life care and manage other types of Advance Directives.</p> <p><b>Description:</b> The PHR Account Holder may want to capture and maintain documents that pertain to end-of-life care and to capture and maintain other types of Advance Directives. End-of-life documents include but</p>			1. The system <b>SHOULD</b> provide the ability to capture documents related to end-of-life care and other types of Advance Directives.	89
						2. The system <b>SHOULD</b> provide the ability to sort a list of end-of life documents based on one or more defined data elements.	90
						3. The system <b>MAY</b> provide the ability to identify a document as Active or Non-Active by category of document.	91

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			are not limited to: Advance Directive for Healthcare; Power of Attorney for Healthcare and Physician Order for Life Sustaining Treatment. The system should allow for multiple occurrences of a document and the ability to archive documents. The documents maintained will depend on the jurisdictional law. The documents may or may not reside in the PHR-S. The document may be scanned images, structured documents or simply a notation on the location of the original (hardcopy or original).			4. The systems <b>SHOULD</b> maintain the end-of-life document and/or notation location.	92
S.3.3.3	F	Manage Documents for Personal Representation	<p><b>Statement:</b> Manage documents that designate those authorized to act on behalf of the PHR Account Holder.</p> <p><b>Description:</b> The PHR Account Holder may want to capture and maintain documents that pertain to designating those authorized to act on behalf of PHR Account Holder for healthcare. Examples include but are not limited to: Guardianship, Legal Custodial Parent, Executor or Trustee. The PHR-S should allow for multiple occurrences of a document and the ability to archive documents. The documents maintained will depend on the jurisdictional law. The documents may or may not reside in the PHR-S. The document may be scanned images, structured documents or simply a notation that specifies the location of the original (hardcopy or original).</p>			1. The system <b>SHOULD</b> provide the ability to capture documents designating those authorized to act on behalf of the PHR Account Holder for healthcare.	93
						2. The system <b>SHOULD</b> provide the ability to sort a list of documents designating those authorized to act on behalf of the PHR Account Holder based on one or more defined data elements.	94
						3. The system <b>MAY</b> provide the ability to identify a document designating those authorized to act on behalf of the PHR Account Holder as Active or NonActive by category of document.	95
						4. The system <b>SHOULD</b> maintain the document designating those authorized to act on behalf of the PHR Account Holder and/or a note that specifies that document's location.	96
S.3.4	F	Manage Data Masking for Sensitive or Selective Information	<p><b>Statement:</b> Allow the PHR Account Holder or designee to mask data on a selective, record, field-by-field, or class basis as one aspect of controlling access to personal health data. The PHR Account Holder has the ability to determine what information is available to an authorized Account Holder of the PHR information.</p>			1. The system <b>SHOULD</b> provide the ability for the PHR Account Holder or designee to specify records, data fields, or data class that will not display intelligibly unless viewed by specified role incumbents under specified conditions.	97
						2. The system <b>MAY</b> provide the ability to offer different levels of masking related to the data or to the approach for masking.	98

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p><b>Description:</b> The PHR Account Holder or designee needs the ability to protect sensitive information by masking specific content without deleting the information.</p> <p><b>Example:</b> The PHR Account Holder wants to make the fact of Sexually Transmitted Disease or pregnancy known if and only if she arrives at an emergency room unconscious.</p>			<p>3. The system <b>SHOULD</b> provide the ability to query systems requesting personal health information to insure the requesting system has the ability to protect masked data.</p> <p>4. The system <b>SHOULD</b> provide the ability to reject a request for transfer of data to other systems that do not support the ability to protect masked data.</p>	<p>99</p> <p>100</p>
S.3.5	F	Manage PHR Output	<p><b>Statement:</b> Enable the authorized PHR Account Holder or designees to manage and generate PHR output.</p> <p><b>Description:</b> The PHR Account Holder may request PHR output which may include standard and ad hoc reports in hardcopy or electronic formats. This output may be for the PHR Account Holder's analysis of his/her health related financial and administrative data, and for sharing of the PHR information for any purposes the PHR Account Holder deems appropriate.</p>			<p>1. The system <b>SHALL</b> provide the ability to generate reports consisting of all or part of an individual's PHR.</p> <p>2. The system <b>SHOULD</b> provide the ability to define the records or reports that are considered the formal health record for disclosure purposes.</p> <p>3. The system <b>SHOULD</b> conform to function IN.1.5 (Store and Manage Unstructured Health Record Information). The system <b>SHOULD</b> keep a record of all updates and changes made.</p> <p>4. The system <b>SHOULD</b> conform to function IN.1.6 (Store and Manage Structured Health Record Information). The system <b>SHOULD</b> keep a record of all updates and changes made.</p> <p>5. The system <b>SHOULD</b> provide the ability to create hardcopy and electronic report summary information (e.g., procedures, medications, lab results, immunizations, allergies, or vital signs).</p> <p>6. The system <b>SHOULD</b> provide the ability to create reports in both chronological and specified records elements order.</p>	<p>101</p> <p>102</p> <p>103</p> <p>104</p> <p>105</p> <p>106</p>
S.3.6	F	Manage PHR Data Import and Export	<p><b>Statement:</b> Allow the PHR Account Holder to manage the import to and export of data from a PHR-S.</p> <p><b>Description:</b> A PHR Account Holder needs to prescribe how data is exchanged with other systems including how data is imported to the PHR-S, and the parameters for data export (e.g., who, when, or the</p>	PH.2.3 IN.1.1		<p>1. The system <b>SHOULD</b> provide the ability to accommodate the exchange of its data content to another PHR system.</p> <p>2. The system <b>SHOULD</b> provide the ability to accommodate the exchange of PHR Account Holder-defined data with an EHR-S.</p> <p>3. The system <b>SHOULD</b> provide the ability to accommodate the exchange of PHR Account Holder-defined data with other systems.</p>	<p>107</p> <p>108</p> <p>109</p>

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>extent of data). Some import and export functions may be one time events. Others may be subscription services such that at regular intervals the PHR is updated, or other data stores are updated from the PHR. The PHR Account Holder should be able to determine the information or data that he/she will accept into the PHR. The system should record the acknowledgement or refusal of data sent to the Account Holder's PHR-S.</p> <p><b>Example:</b> A PHR Account Holder uses an interface within the PHR-S to have a provider's EHR-S updated with new PHR information every time a specialist encounter is entered within the PHR-S.</p>			<p>4. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to designate entities from which data will be imported into the PHR-S.</p> <p>5. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to designate entities to which data will be exported from the PHR-S.</p> <p>6. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to exchange information with an entity on a one-time or a recurring basis.</p> <p>7. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to annotate incoming information.</p> <p>8. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to acknowledge receipt or denial of information sent from another system.</p>	<p>110</p> <p>111</p> <p>112</p> <p>113</p> <p>114</p>
S.3.7	F	Manage Secondary Use Request	<p><b>Statement:</b> Support the formal and routine request for PHR Account Holder health record information for secondary uses.</p> <p><b>Description:</b> Provide hardcopy and electronic output that supports the needs of a variety of secondary uses such as: annual immunization requests from schools/camps, application processing for disability requests, validation of compliance with treatment regimens. This mechanism should be provided for both chronological and specified record element output. An auditable record of these requests and associated exports may be maintained by the system. The system has the capability of providing a report of accounting of disclosures of the secondary PHR Account Holders in accordance with user role, organizational policy and/or jurisdictional law.</p>			<p>1. The system <b>SHOULD</b> provide the ability to record the requestor of the data including date of request and date of request determination.</p> <p>2. The system <b>MAY</b> provide the ability for the PHR Account Holder to password protect PHR Account Holder defined exported records for additional privacy.</p> <p>3. The system <b>SHOULD</b> provide the ability to identify specific PHR information to be reviewed and acted upon by the authorized PHR Account Holder for the purpose of inactivation, destruction or retention.</p> <p>4. The system <b>SHOULD</b> provide the ability to include PHR Account Holder identifying information on each page of the reports generated.</p> <p>5. The system <b>SHOULD</b> provide the ability to export PHR records to a variety of PHR Account Holders using various platforms without needing special viewing software.</p>	<p>115</p> <p>116</p> <p>117</p> <p>118</p> <p>119</p>
S.3.8	F	Manage Requests for Release of Information	<p><b>Statement:</b> Support requests for release of PHR Account Holder health record information.</p>	<p>IN.1.5</p> <p>IN.1.1</p> <p>IN.1.6</p>	<p>IN.6.1.5</p> <p>IN.6.1.5</p> <p>IN 6.2.1</p>	<p>1. The system <b>SHOULD</b> provide the ability to record the requestor of the data including date of request and date of request determination.</p>	<p>120</p>

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			<p><b>Description:</b> Either the PHR Account Holder or the PHR Account Holder's designee may receive formal requests to release some or all of the PHR information. These requests may be ad hoc, or may also be routine, recurring requests that may be episodic or longer term. These requests may be related to patient care, administrative process, law enforcement or legal action. An auditable record of these requests and associated fulfillment(s) should be maintained by the system. The system should providing an accounting of PHR disclosures of the Release of Information Requests in accordance with user role, organizational policy and/or jurisdictional law.</p>			2. The system <b>SHOULD</b> provide the ability to record the Authorization or Consent associated with the request for release of information.	121
						3. The system <b>MAY</b> provide the ability to manage and track the fulfillment status of requests.	122
						4. The system <b>SHOULD</b> support recurring, standing requests for PHR information.	123
						5. The system <b>MAY</b> provide the ability for the PHR Account Holder to password protect PHR Account Holder defined exported records for additional privacy.	124
						6. The system <b>SHOULD</b> provide the ability to include PHR Account Holder identifying information on each page of the reports generated.	125
						7. The system <b>MAY</b> provide the ability to export PHR records to a variety of PHR Account Holders using various platforms without needing special viewing software.	126
						8. The system <b>SHOULD</b> conform to function S.3.4 (Manage Data Masking for Sensitive or Selective Information) when masking any PHR data provided.	127
						9. The system <b>SHOULD</b> provide the ability to send electronic responses with unstructured and structured health record information.	128
						10. The system <b>MAY</b> conform to function IN.2.1 (Interchange Standards) to enable data extraction in standard-based formats.	129
S.3.9	F	Manage Information Views		<p><b>Statement:</b> Support PHR Account Holder-defined information views.</p> <p><b>Description:</b> Views of information can be tailored for or by the PHR Account Holder (PHR Account Holder, caregiver or other authorized PHR account user) for their presentation preferences and to support personal or role-based workflows.</p> <p><b>Examples:</b> A PHR Account Holder may prefer to see summary information about</p>	IN.1.3 IN.1.4 PH.2.4		1. The system <b>SHOULD</b> provide the ability for a PHR Account Holder, proxy or designee to configure personal views of PHR information.
					2. The system <b>MAY</b> provide the ability to offer role-based views of PHR information.	131	
					3. The system <b>MAY</b> provide the ability for an PHR Account Holder to tailor role-based views.	132	
					4. The system <b>MAY</b> provide the ability for the PHR Account Holder to save multiple customized views for more rapid display of information by the PHR Account Holder.	133	

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			medications, while a provider's view may include detailed information about current dosage and the PHR Account Holder's response to the medication over time.			5. The system <b>MAY</b> provide the ability to for a PHR Account Holder or authorized user to maintain individual custom views for future access.	134
S.4	H	Manage Other Resources	<b>Statement:</b> The purpose of this section is to provide the system support to both allow the PHR Account Holder to participate in a variety of programs that may be directly related to areas of interest to the PHR Account Holder and to enable appropriate access and support for secondary uses of PHR information.				135
S.4.1	H	Manage Clinical Research Information	<b>Statement:</b> Support a PHR Account Holder in clinical trials and provide research information.  <b>Description:</b> In seeking healthcare, the system should support the PHR Account Holder being able to obtain a list (s) of available clinical trials/research. The PHR Account Holder should be able to refine trials by geographic area, by disease, by treatment, by sponsor and maintain, or provide access to, current clinical trial/research information. The system should also support the PHR Account Holder's participation in, and support of, appropriate secondary uses of their PHR information for clinical research which could include quality and performance analysis.	S.2.2			136
S.4.1.1	F	Capture Genomic/Proteomic Data and Documentation from External Clinical Sources	<b>Statement:</b> Incorporate genomic/proteomic data and documentation from external sources.  <b>Description:</b> Mechanisms for incorporating external genomic/proteomic data and documentation (including identification of source) such as image documents, reports and other clinically relevant electronic data are available.			1. The system <b>SHOULD</b> provide the ability to capture relevant family genomic history. 2. The system <b>MAY</b> add and update genomic/proteomic information through interaction with other systems, applications and modules. 3. IF lab results are received through an electronic interface, THEN the system <b>SHALL</b> display the data elements upon request. 4. IF lab results are received through an electronic interface, THEN the system <b>SHALL</b> receive and store the data elements into the PHR Account Holder record.	137 138 139 140

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
						5. The system <b>MAY</b> provide the ability to store imaged documents.	141
						6. The system <b>SHOULD</b> provide the ability to receive, store and present text-based externally-sourced documents and reports.	142
S.4.1.2	F	Manage De-Identified Data Request Process	<p><b>Statement:</b> Provide PHR Account Holder data in a manner that meets local requirements for de-identification.</p> <p><b>Description:</b> When the PHR owner desires to share his/her information in a de-identified state, the owner can export the data in a fashion that meets requirements for de-identification in that locale or realm.</p> <p><b>Examples:</b> If a person wants to participate in a study that will utilize de-identified data, then the system should provide the ability to de-identify this data according to the requirements of the study.</p> <p>In Germany, when a PHR Account Holder's subscription is cancelled, the PHR data may be maintained. But if the data is maintained, it must be maintained in a de-identified state or be pseudonomized (similar to the limited data set in the U.S. Privacy Rule).</p>			1. The system <b>SHOULD</b> allow the PHR Account Holder to de-identify his or her information as needed to meet the requirements of a study or other request.	143
						2. The system <b>SHOULD</b> capture the source and date of a de-identified data request.	144
						3. The system <b>SHOULD</b> provide the ability to record the date, data and target of the de-identified data.	145
						4. The system <b>SHOULD</b> provide the ability to record confirmation of the target's receipt of the data.	146
						5. The system <b>SHOULD</b> provide the ability to report on the history of data submissions.	147
						6. The system <b>SHOULD</b> provide the ability to de-identify data consistent with jurisdictional law.	148
S.4.1.3	F	Manage PHR Account Holder Notification of Clinical Trials	<p><b>Statement:</b> Support member notification of clinical trials or research</p> <p><b>Description:</b> A PHR Account Holder should be notified of clinical trials in which they have an interest. The individual may obtain clinical trial information based on general description or specific description such as diagnosis or trial phase. A PHR Account Holder should be able to make their clinical and demographic data available for clinical trials and/or research matching.</p>			1. The system <b>SHOULD</b> provide the ability to sign up for clinical trial notifications.	149
						2. The system <b>SHOULD</b> provide the ability to receive clinical trial notifications.	150
						3. The system <b>MAY</b> provide the ability to export the data fields necessary to match the PHR Account Holder to clinical trials.	151
						4. The system <b>SHOULD</b> provide the ability to access multiple sources of clinical trial and research information.	152
						5. The system <b>SHOULD</b> provide the ability to perform a focused search of trials by one or more attributes.	153

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
S.4.1.4	F	Manage PHR Account Holder Enrollment in Clinical Trials or Research	<p><b>Statement:</b> Support member enrollment in clinical trials or research.</p> <p><b>Description:</b> The system should support a PHR Account Holder having the ability to enroll in clinical trials or research, The system should be able to capture administrative and consent requirements, trial or research questionnaires, data submissions and all alerts associated with a program. The PHR Account Holder should also have the ability to choose which programs they desire to participate in when notified of trial availability and high quality PHR Account Holder match.</p>			1. The system <b>SHOULD</b> provide the ability to support an PHR Account Holder's enrollment in a clinical trial or research program.	154
						2. The system <b>SHOULD</b> provide the ability to capture all administrative information about a clinical trial or research program.	155
						3. The system <b>SHOULD</b> provide the ability to sort clinical trial or research participation by categories.	156
						4. The system <b>SHOULD</b> provide the ability to capture alerts from the clinical trial program.	157
						5. The system <b>SHOULD</b> provide the ability to prompt the PHR Account Holder for clinical trial requirements.	158
						6. The system <b>MAY</b> provide the ability to search the available health benefit plan clinical trial/research support.	159
S.4.2	F	Registry Notification and Management	<p><b>Statement:</b> Enable data sharing and communication with registries and manage the related information shared.</p> <p><b>Description:</b> Support the automated transfer of formatted demographic and clinical information to local disease specific registries (and other notifiable registries) to enable PHR Account Holder to participate, if and as desired, in provider and public health monitoring and subsequent epidemiological analysis.</p> <p>The PHR Account Holder can export personal health information to disease specific registries, other notifiable registries such as immunization registries, through standard data transfer protocols or messages. The PHR Account Holder can update and configure communication for new registries, or delete communication with an existing registry.</p>			1. The system <b>SHAL</b> conform to function IN.1.1 (Entity Authentication).	160
						2. The system <b>SHALL</b> conform to function IN.1.3 (Entity Access Control).	161
						3. The system <b>SHOULD</b> provide the ability to add, change, or remove data sharing and communication to registries.	162
						4. The system <b>MAY</b> support the transfer of appropriately formatted demographic and clinical information to local disease specific registries (and other notifiable registries).	163
						5. The systems <b>MAY</b> support registry information access for the PHR Account Holder to view data on them in the registry.	164

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S.4.3	F	Manage Donor Information	<p><b>Statement:</b> Provide capability to capture and share needed information as a volunteer donor.</p> <p><b>Description:</b> The PHR Account Holder is able to capture and share donor information (for products such as blood, organs, eggs, sperm, or stem cells). The PHR Account Holder can make this information available to donor matching agencies. This information may be in multiple formats, hardcopy output, standard messaging, display for authorized PHR Account Holders.</p>		IN.6.1.5 IN.6.1.5 IN 6.2.1	1. The system <b>MAY</b> provide the ability to document demographic and clinical information needed for organ and/or tissue donation.	165
						2. The system <b>MAY</b> share documented demographic and clinical information about potential donations with appropriate outside parties.	166
						3. The system <b>SHOULD</b> provide the ability to report export unstructured health record information.	167
						4. The system <b>SHOULD</b> provide the ability to report export structured health record information.	168
						5. The system <b>SHALL</b> conform to S.3.3.1 (Manage Consents and Authorizations).	169
						6. The system <b>MAY</b> conform to function IN.2.1 (Interchange Standards) to enable data extraction in standard-based formats.	170
S.4.4	F	Manage PHR Account Holder Education Material Updates	<p><b>Statement:</b> Receive and validate formatted inbound communications to facilitate and/or perform updating of PHR Account Holder education material.</p> <p><b>Description:</b> Materials may include information about a diagnosis, recommended diets, associated PHR Account Holder health organizations, international vaccinations needed for travel, or web links to similar educational information. These materials would be provided electronically and may require validation prior to inclusion in the system.</p>			1. The system <b>SHALL</b> allow educational materials to be updated electronically.	171
						2. The system <b>MAY</b> provide the ability to validate the educational material prior to update.	172
S.4.5	F	Manage PHR Account Holder Reminder Information Updates	<p><b>Statement:</b> Receive and validate formatted inbound communications to facilitate updating of PHR Account Holder reminder information from external sources such as Cancer or Immunization Registries.</p> <p><b>Description:</b> Information from outside groups, such as immunization groups or public health organizations, may periodically have and send updates of value to PHR</p>	PH.3.5.4		1. The system <b>MAY</b> provide the ability to automatically associate reminders with PHR Account Holders meeting specific phenotypic criteria such as age, gender, or diagnosis.	173
						2. The system <b>MAY</b> provide the ability to display PHR Account Holder reminders.	174
						3. The system <b>MAY</b> provide the ability to record the PHR Account Holder reminder activity.	175
						4. The system <b>MAY</b> provide the ability to query and report PHR Account Holder reminder activity.	176

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p>Account Holders. The PHR-S should be capable of generating reminders based on the recommendations of these organizations. Reminders could be provided to PHR Account Holders by a number of means, including alerts or system generated email. A record of such reminders may become part of a PHR Account Holder's record.</p> <p><b>Examples:</b> Reminders could include a recommended immunization, prophylactic guidelines for treating Mitral Valve Prolapse disorder, or PHR Account Holder self-testing for disease.</p>			5. The system <b>MAY</b> provide the ability to automatically generate PHR Account Holder reminders for email, and record that reminder activity.	177
S.4.6	H	Manage Public Health Information	<p><b>Statement:</b> Manage the PHR Account Holder's use of PHR-related Public Health Information and/or services.</p>				178
S.4.6.1	F	Manage Public Health Related Updates	<p><b>Statement:</b> Provide the ability to update and maintain information regarding public health notifications.</p> <p><b>Description:</b> Public health updates may be applicable to entire geographic regions or specific to a specific locale or diagnosis. The system should allow the PHR Account Holder to identify the types of public health updates that are of interest. The system should also allow a PHR Account Holder to be notified of other public health occurrences which may affect an entire population.</p>			1. The system <b>MAY</b> provide the ability to add notification for the PHR Account Holder based on the recommendations of public health authorities.	179
						2. The system <b>MAY</b> provide the ability to automatically associate reminders with PHR Account Holders meeting specific phenotypic criteria such as age, gender, or diagnosis.	180
S.4.6.2	F	Manage Access to Public Health Information Resources	<p><b>Statement:</b> Enable access to public health information resources.</p> <p><b>Description:</b> PHR Account Holder shall have access to public health information resources.</p>			1. The system <b>SHOULD</b> provide the ability for a member to subscribe to Public Health information resources.	181
						2. The system <b>MAY</b> provide the ability to capture all administrative information necessary to subscribe to Public Health Information resources.	182

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			<p><b>Examples:</b> A PHR Account Holder may want to receive general news releases from specific local, state and federal agencies. A PHR Account Holder may want to access information regarding public health resources for specific areas of interest such as birth control or hepatitis prevention.</p>			3. The system <b>SHOULD</b> provide the ability to sort public health information resources by enrollment date, and category.	183
						4. The system <b>SHOULD</b> provide the ability to capture alerts from public health information resources.	184
S.4.6.3	F	Manage Access to Public Health Knowledge Bases	<p><b>Statement:</b> Enable access to public health knowledge bases.</p> <p><b>Description:</b> PHR Account Holder shall have access to public health knowledge bases.</p> <p><b>Example:</b> A PHR Account Holder may want to access up to date information from local, state and federal agencies regarding diabetes outcomes.</p>		S.1.4.2	1. The system <b>SHOULD</b> provide the ability for a member to subscribe to Public Health knowledge bases.	185
						2. The system <b>MAY</b> provide the ability to capture all administrative information necessary to subscribe to public health information knowledge bases.	186
						3. The system <b>SHOULD</b> provide the ability to sort public health knowledge bases by enrollment date, and category.	187
						4. The system <b>SHOULD</b> provide the ability to capture alerts from public health knowledge bases.	188
S.4.6.4	F	Manage Enrollment in Public Health Programs	<p><b>Statement:</b> Provide the ability to enroll in public health programs.</p> <p><b>Description:</b> The systems should support the ability of a PHR Account Holder to enroll in all available local, state and federal public health programs.</p> <p><b>Example:</b> A PHR Account Holder would like to enroll in a local or regional maternal health program to receive care for pregnancy.</p>			1. The system <b>SHOULD</b> provide the ability for a PHR Account Holder to enroll in public health programs.	189
						2. The system <b>MAY</b> provide the ability to capture all administrative information necessary to enroll in public health programs.	190
						3. The system <b>SHOULD</b> provide the ability to sort public health programs by enrollment date and category.	191
						4. The system <b>SHOULD</b> provide the ability to capture notices from public health program offices.	192
S.4.6.5	F	Manage Enrollment in Public Health Notices and Alerts	<p><b>Statement:</b> Support member subscriptions to public health notices and alerts.</p> <p><b>Description:</b> A PHR Account Holder should have the ability to subscribe to local, state or federal public health notices and alerts.</p> <p><b>Example:</b> The PHR Account Holder enrolls to receive public health alerts from a local or</p>			1. The system <b>SHOULD</b> provide the ability for a member to subscribe to public health notices and alerts.	193
						2. The system <b>MAY</b> provide the ability to capture all administrative information necessary to subscribe to public health notices and alerts.	194
						3. The system <b>SHOULD</b> provide the ability to sort public health notices and alerts by publishing date, and category.	195

ID#	Type	Name	Statement/Description	See Also in PHR-S FM	See Also in EHR-S FM	Conformance Criteria	Row #
			regional health department that has recently issued an alert for meningitis.			4. The system <b>SHOULD</b> provide the ability to capture notices and alerts from public health agencies.	196
S.4.6.6	F	Enrollment in Public Health Surveys	<p><b>Statement:</b> Support access to public health surveys.</p> <p><b>Description:</b> A PHR Account Holder will have the ability to participate in public health surveys and store their responses to those surveys.</p> <p><b>Example:</b> The World Health Organization offers a survey to research the number of smokers who also have a specific related disease.</p>			1. The system <b>SHOULD</b> provide the ability for the PHR Account Holder to access public health surveys from local, state and federal agencies.	197
						2. The system <b>SHOULD</b> provide the ability to capture all administrative information necessary to enroll in public health surveys.	198
						3. The system <b>SHOULD</b> provide the ability to sort and select public health surveys that apply to the PHR Account Holder.	199
						4. The system <b>SHOULD</b> provide the ability to capture PHR Account Holder response to public health surveys.	200