Checklist for using My Health Record

My Health Record

The checklist provides a comprehensive list of all the information and actions that practice managers and providers need to understand to register for and use the My Health Record system in their practice, and to have informed conversations about My Health Record with consumers and their carers. It provides additional information pertinent to providers and other employees who may interact with the My Health Record system such as privacy, access controls and security.

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CSR-1666 061020

1. Understanding My Health Record

About My Health Record

This section lists key resources to educate and inform you about My Health Record systems, controls and benefits. It includes links to educational materials about My Health Record, resources for using My Health Record and online education about Provider Digital Access (PRODA) and Health Professional Online Services (HPOS) which are required before registration.

What is My Health Record and what are the benefits?

My Health Record website, benefits for providers, benefits to consumers, YouTube case studies and webinars.

Information on uploading, viewing and organisation registration.

Additional information to provide consumers.

Using My Health Record in the mental health sector

The My Health Record Mental Health Toolkit and associated resources contain information to support providers and consumers to make informed decisions about My Health Record.

These resources consist of:

- Summary sheet – One-page summary of the resources
- Toolkit for practitioners – Details everything you need to know in much greater depth and provides case studies of using My Health Record
- Factsheet – Answer key FAQs using My Health Record in the mental health sector, including privacy, consent, emergency access and access control
- Organisation checklist (this document) – A quick and easy way to make sure you have everything you need to register
- Consumer journey maps – Graphical stories showing how My Health Record integrates into the lives of different people living with mental health issues
- Registration flowchart – Clearly shows how to register your organisation
- Workflows – Demonstrates how to use My Health Record in your regular practice

These documents are available for download from the My Health Record website.

Online education about PRODA and HPOS

PRODA provides secure access to online government services. Access online PRODA education.

HPOS is a fast and secure way for health professionals and administrators to do business with the Australian Government. Access online HPOS education.

2. Getting set up

There are several actions required to prepare for setting up access to the My Health Record for your organisation and staff members. This includes understanding your policy and privacy obligations, updating organisation policies, gathering key information and identifiers to prepare for registration and registering and configuring your software.

A healthcare identifier is a unique number that has been be assigned to individuals, and to healthcare providers and organisations that provide health services, in order to accurately match records to consumers and improve communication between healthcare providers.

Policies and obligations

My Health Record system security policy

It is a legal requirement that a My Health Record System Security Policy be implemented as described in the My Health Records Rule 2016.

My Health Record policy templates are published by the Royal Australian College of General Practitioners, the Pharmaceutical Society of Australia , Allied Health Professions Australia and on the My Health Record website.

It is the role of the responsible officer (RO) and organisation maintenance officer(s) (OMO) to ensure that a process is in place for auditing when staff have accessed My Health Record in the event of a breach investigation and for training purposes.

NASH PKI Certificate Policy

Under the National Authentication Service for Health (NASH) Public Key Infrastructure (PKI) Certificate for Healthcare Provider Organisations Terms and Conditions of Use, healthcare organisations using a NASH PKI are required to have policies and procedures in place governing use of the NASH PKI Certificate. Full details are available on the Services Australia website. A template NASH PKI Policy is available on the My Health Record website.

Recognise privacy and security obligations

Healthcare provider organisations that use My Health Record must meet the obligations laid out in rule 42 of the *My Health Records Rule 2016* including security measures, updating their privacy policy and staff training requirements. Both the My Health Record website and the Australian Digital Health Agency Cyber Security Centre website hold information and resources to optimise privacy and security for My Health Record and other healthcare systems.

Information regarding ongoing participation obligations is available on the My Health Record website.

Most organisations have additional privacy obligations under the Privacy Act 1988. For more information about your these privacy obligations, please visit the *Guide to health privacy* published by the Office of the Australian Information Commissioner, the privacy regulator of the My Health Record system.

Most Australian states and territories also have equivalent privacy legislation which covers their public sector agencies.

Healthcare identifiers

Healthcare Provider Identifier – Individual (HPI-I)

An HPI-I is required for registration with the My Health Record. Make a note of your HPI-I as this will be required in subsequent steps. An organisation needs to have someone with an HPI-I before they can obtain an HPI-O.

An HPI-I identifies an individual healthcare provider involved in providing consumer care. Registration for an HPI-I for individuals is processed through the Services Australia website. There are different processes for Ahpra registered and non-Ahpra registered individuals all of which is detailed in the Services Australia guide. Depending on your situation, you may have to register for a PRODA account or use HPOS.

Self-regulated providers are healthcare providers not registered with Ahpra. Self-regulated providers will need to apply for an HPI-I through Health Professional Online Services (HPOS). Individuals will require their own Provider Digital Access (PRODA) account to access HPOS. Individuals will need to upload evidence of their membership to a professional association and the professional association will need to adhere to certain characteristics.

Healthcare Provider Identifier – Organisation (HPI-O)

An HPI-O is required for registration with the My Health Record.

The HPI-O identifies the healthcare provider organisation where healthcare is provided. All organisations that provide healthcare services and employ one or more healthcare providers can apply for an HPI-O from the HI Service.

An organisation must provide evidence to the HI Service to demonstrate it is a healthcare provider organisation. Sole traders who provide health services can also be assigned an HPI-O. It is available once the organisation has completed the online registration process for the Healthcare Identifiers Service (HI Service) and My Health Record.

Responsible officer and organisation maintenance officer

Organisation identifies a RO & OMO

Understand My Health Record roles and responsibilities including the RO and OMO. The *Practice Manager Registration Guide* details the necessary steps for an RO.

The RO and OMO(s) are responsible for ensuring the steps in this document are reviewed for their organisation. They also manage organisation interactions with HI Service and My Health Record. The RO is typically the chief executive officer, chief operations officer, the practice manager or business owner. The RO may take on the OMO role as well. Each organisation can have only one RO but can have multiple OMOs.

Make a record of the individuals who are the RO and OMO(s) in the organisation, preferably in your "My Health Record Security and Access Policy". A template can be provided by the Agency. If a change in RO has taken place, submit an application to replace the RO for an organisation with an existing HPI-O.

OMO and/or RO registers for a PRODA account and links to HPOS

RO/OMO creates or signs into a PRODA account and clicks on HPOS tile.

Nominating the OMO(s)

Once the organisation is registered for My Health Record, ensure the person managing the organisation is nominated as an OMO in HPOS. As part of the registration process, the applicant will be automatically assigned as both the RO and an OMO.

OMOs can be added, removed or changed via HPOS as required.

An alternative to HPOS is to use the HW040 form.

Register an organisation for My Health Record – information required

Business ABN/ACN

Required for registration

Trading name

Required for registration

Street address

Required for registration

Postal address

Required for registration

Responsible officer (RO):

Required for registration, the officer of an organisation who has authority to act on behalf of the seed organisation and relevant network organisations (if any) in its dealings with the System Operator of the My Health Record system. See below for more information.

Organisation maintenance officer/s:

Required for registration, the officer of an organisation who acts on behalf of a seed organisation and/or network organisations (if any) in its day-to-day administrative dealings with the HI Service and the My Health Record system. See above for more information.

Mobile phone (to receive SMS)

Required to receive personal identification code (PIC) to download the NASH within 30 days. A step in connecting to My Health Record via conformant software.

Organisation type

Check options on the Services Australia website or see below for more information.

Registering the organisation via HPOS

☐ Register with the Healthcare Identifiers (HI) Service to access My Health Record

Once registered for a PRODA account, the RO/OMO can register to access the My Health Record system. If the organisation is not already registered with the Healthcare Identifiers (HI) Service, do the following:

When an organisation is registered with the HI Service, it is necessary to determine the appropriate structure, either as a seed organisation or a network organisation. This tab shows a complete list of organisation & service types to assist with determining the 'Organisation type' information.

A seed organisation is a legal entity that provides or controls the delivery of healthcare services. A seed organisation could be, for example, a local GP practice, pharmacy or private medical specialist. An example of a network organisation could be an individual department (e.g. pathology or radiology) within a wider metropolitan hospital.

☐ Register seed organisation for the HI Service and My Health Record via HPOS

My Health Record registration step by step guides are on the My Health Record website and the HPOS website. The RO completes the registration request via HPOS.

Follow these steps if you have had a change of ownership.
To amend organisation details including updating the personal details of an RO or OMO and to deactivate, reactivate and retire an HPI-O use HPOS or these forms.
For further advice contact the HI Service on 1300 361 457.

When registering your seed organisation with the HI Service and the My Health Record system, your organisation will have the opportunity to consent to details being entered in the National Health Services Directory (NHSD).

☐ A network organisation is a sub-entity of a seed organisation that provides healthcare services, e.g. practices with multiple locations or hospital departments (such as a maternity ward, emergency department)
If required, register network organisations

If your organisation decides to register one or more network organisations follow these steps to add organisation(s) to create a network organisation underneath the seed. You will be instantly provided with the new HPI-Os of the network organisations created. Then follow these steps to register these networks in the My Health Record system. Each network organisation requests a NASH PKI certificate separately.

Three key considerations when defining the organisation structure type:

- How information is currently shared within your organisation or associated organisations;
- Whether, and how, your organisation conducts secure message delivery (SMD); and
- The technical capabilities of your organisation's IT systems.

The above criteria will help determine whether a network organisation should be registered. Network organisations are asked to set access flags when registering the network organisation for My Health Record. Access flags are a mechanism of the My Health Record system which allows consumers to understand and control an organisations' access to their My Health Record. There is more information about access flags on the My Health Record website and in Division 4 of the *My Health Records Rule 2016*. Access flags allow networks to either inherit their parent organisation's access (flag set to 'no') or have access separate from their parent's organisation's access (flag set to 'yes'). A seed organisation is always set to 'yes'.

For further support regarding network organisations, contact the HI Service.

Connect to My Health Record via conformant software

Healthcare providers can choose to access the consumer's My Health Record information through conformant software which allows healthcare providers to view, download and upload information to their consumer's My Health Record.

Once your My Health Record registration application is approved you may request a National Authentication Service for Health (NASH) Public Key Infrastructure (PKI) Certificate to securely access and share health information. You may also do so via the HW001 form.

Ensure a mobile phone is entered when prompted to receive an SMS with the personal identification code (PIC) to download the NASH within 30 days.

RO and OMO should plan to apply for, and install, a new NASH with the support of the software vendor at the expiry date. Certificates are valid for 2 years and your organisation will be notified 6 weeks prior to a certificate expiring. If the NASH PKI has expired or cannot be accessed, request a new NASH and indicate to revoke the previous NASH PKI Certificate.

Organisations won't need to request a NASH PKI Certificate if the software is on the Register of Conformity as a contracted service provider (CSP). More information is available on the My Health Record website.

Connect to My Health Record via the National Provider Portal

For those who don't have conformant software, the National Provider Portal allows health professionals read-only access to view their consumer's My Health Record information.

To register for the Provider Portal, you will first need to ensure you have registered as a seed organisation for My Health Record and have an HPI-O. Before you start using My Health Record through the Provider Portal, the RO/OMO for your healthcare organisation needs to authorise HPI-Is and ensure that they are linked to the HPI-O.

Once your providers have registered for PRODA, they can set-up My Health Record Provider Portal access. Click here to access the Provider Portal online or via PRODA. The next time they log in to PRODA, the My Health Record tile will appear under the Linked services section. They only need to complete linking once.

Software configuration

☐ Contact your software vendor or IT support

Discuss with your software vendor:

- Whether a list of HPI-Is is required to be available for configuring the software
- Configuration of NASH and Medicare PKI Certificates into software as required by the software vendor

☐ Confirm HPI-O and HPI-I numbers have been configured into software

When staff leave, deactivate their user accounts. Unlink HPI-Is from the organisation via HPOS as required.

☐ Software settings are updated to ensure permission for staff accessing My Health Record.

Staff will require relevant viewing/uploading permissions for My Health Record and Electronic Transfer of Prescriptions to be enabled.

☐ Check if conformant software can access My Health Record

Contact software vendor if there are connection errors or Individual Healthcare Identifier (IHI) errors.

☐ Organisation has an electronic transfer of prescriptions product installed *(if required)*

Set up Electronic Transfer of Prescriptions
eRx Script Exchange (1300 700 921)
or MediSecure (1800 472 747)

3. Informing your staff and your consumers

It is important to keep your staff informed about My Health Record so that they will trust and use the system and be able to have informed conversation with consumers about My Health Record. Below are a set of key links and options for staff training.

Privacy, security and access control for consumers and providers

☐ Provide My Health Record information to your patients

A range of information and brochures are available on the My Health Record website, along with information for consumers and their families, access controls, privacy, security and extra tips.

Resources can also be ordered online at http://myhealthrecord.immij.com with the password *digitalhealth* and the following usernames as applicable:

- GP
- Pharmacy
- Hospital
- PHN

☐ Review and update privacy policy

Review and update your privacy policy to let patients know in more detail how you will handle their personal information, including your use of the My Health Record system

☐ Review and update privacy collection notices

Let your patients know some of the key points about how you will handle their personal information at the time of collection, including:

- The organisation's identity and contact details
- The facts and circumstances of collection
- If the collection is required or authorised by law
- The purposes of collection
- The consequences for the individual if personal information is not collected
- Third parties to whom the organisation discloses their personal information
- Information about access and correction of their personal information
- Disclosure of their personal information outside of Australia.

Privacy collection notices are normally included as part of forms, both paper and electronic.

☐ Add information to your website and privacy policy

Inform consumers that your healthcare organisation uses My Health Record

Staff training

☐ Staff completed My Health Record training

Internal My Health Record training is provided to organisation staff and a register of this training is maintained. See *Recommended Training Checklist*.

4. More information

For further information and support

Below you will find additional contacts and helplines to assist you with your queries.

Helpline	Queries	Contact	Available
Healthcare Identifiers (HI) Service	Identifier queries and organisation registration	**Phone** 1300 361 457	Mon-Fri 8.30am - 5.00pm AEST & AWST
PRODA Help	PRODA queries	**Phone** 1800 700 199	Mon-Fri 8.00am - 5.00pm AWST
HPOS Help	HPOS queries	**Phone** 132 150	Mon-Fri 8.00am - 5.00 pm AWST
eBusiness Service Centre	Certificates, including Medicare PKI Site Certificates and NASH	**Phone** 1800 700 199	Mon-Fri 8.00am - 5.00pm AEST & AWST
My Health Record Help Line	General enquiries and detailed support for individuals and healthcare providers	**Phone** 1800 723 471	Open 24 hours, 7 days
Australian Digital Health Agency Help Centre	Complex queries, vendor enquiries, secure messaging delivery enquiries, and digital health education	**Phone** 1300 901 001 **Email** help@digitalhealth.gov.au	Mon-Fri 8.00am - 5.00pm AEST

Updated: October 2020