

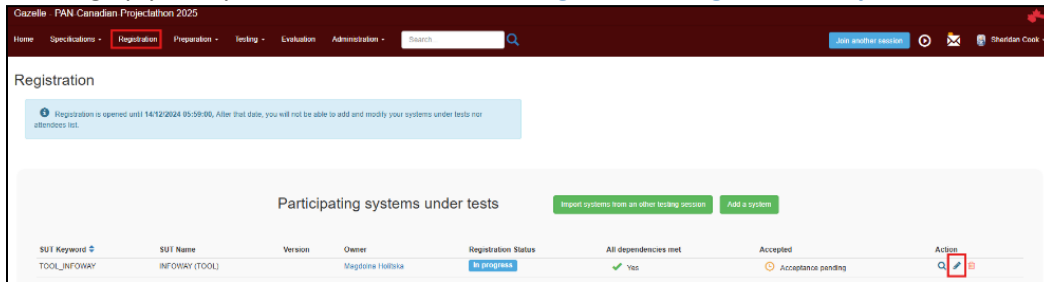
Instructions for Selecting Tests at Registration

Review the Navigation Instructions below then use the hyperlinked headings to jump to the instructions for the specification(s) you're interested in testing:

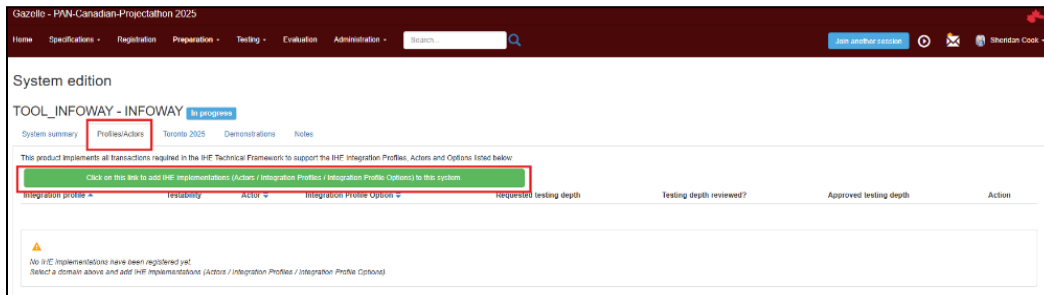
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- Patient Summary No-Peer and Peer-to-Peer Testing 2
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Registration Navigation Instructions for All Specifications

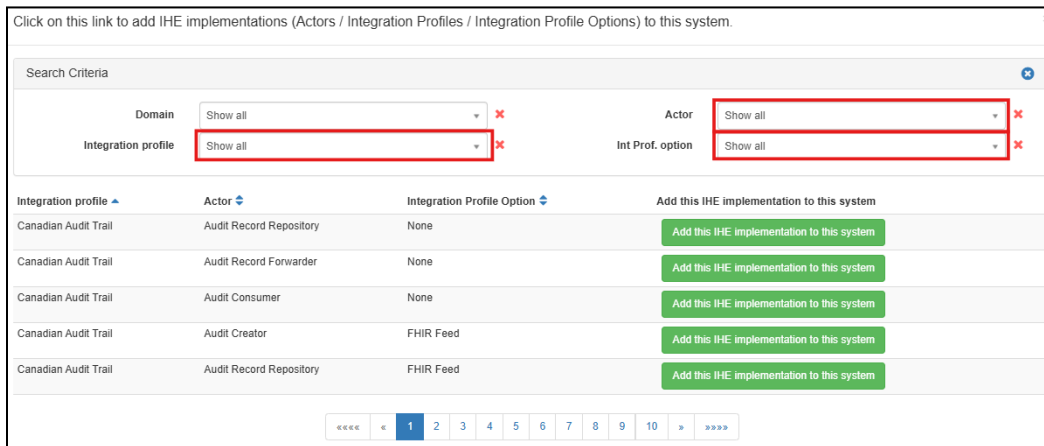
- After setting up your Systems Under Test in the **Registration Page**, click the **pencil icon**.



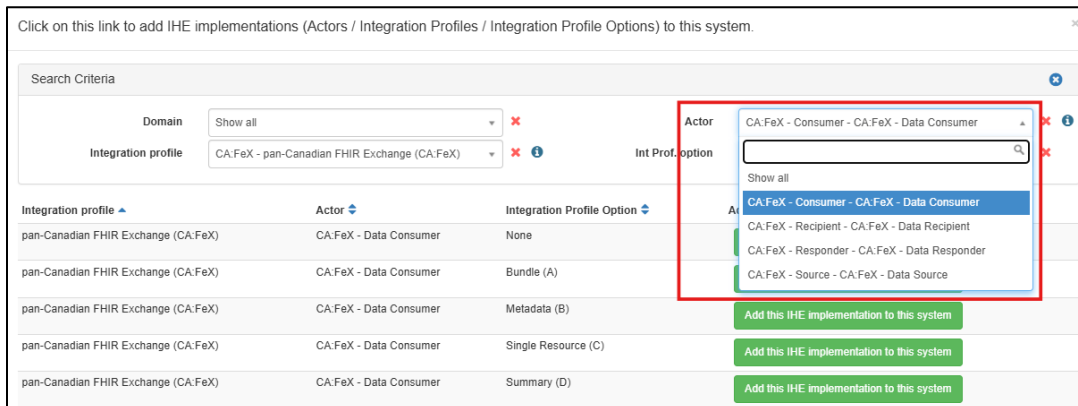
- Click the **Profiles/Actors Tab**, Click on the green button to **Add IHE Implementations (Actors/ Integration Profiles/ Integration Profile Options) to this system**. This will allow you to quickly sign up for groups of test cases that are relevant to your desired actor roles.



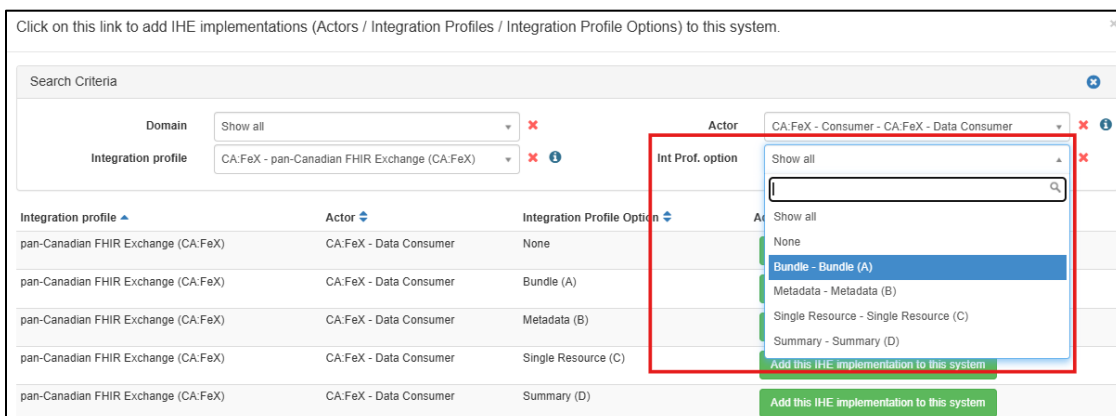
- In the pop-up you will be prompted to apply **Search Criteria** filters to narrow down the IHE implementation (test case grouping) that will result in tests being added to your test plan. Use the decision logic below to narrow the search criteria to your desired IHE Implementations.



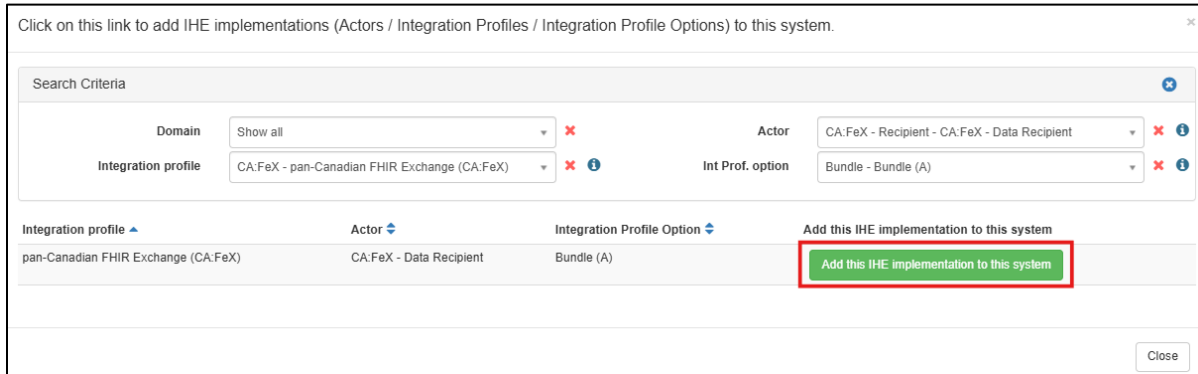
- Note that **Payload Validation** tests (e.g., PS-CA Validation, optional PS-jurisdictional Validation) are added automatically in the CA:FeX and MHD Implementations for Data Source Actors.
- If you are the recipient of a patient summary (i.e., in a push scenario), **Select the “Data Recipient” Actor** from the dropdown menu.
- If you are a system that is requesting/retrieving a patient summary from another system (i.e., in a query scenario), **Select the “Data Consumer” Actor** from the dropdown menu.
- If you are a system that is responding to a request for a patient summary (i.e., in a query scenario), **Select the “Data Responder” Actor** from the dropdown menu.



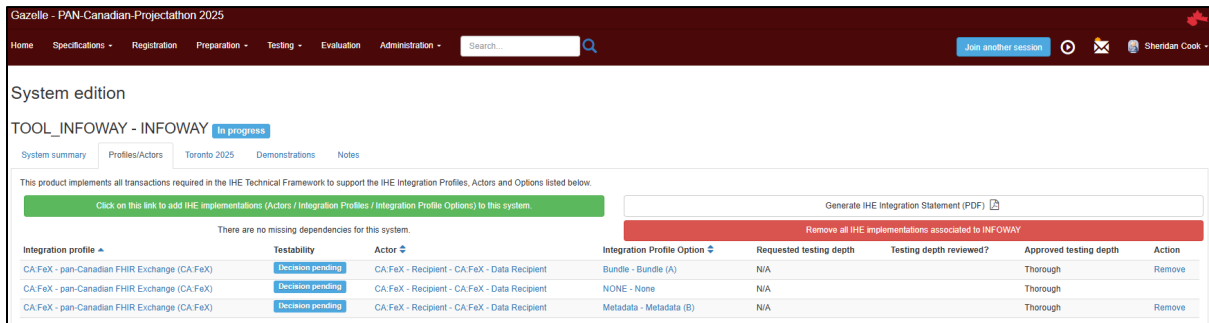
- Next, apply the **Int. Prof. Option Filter**. Integration Profile Options describe the patterns available to you in the specification (e.g., CA:FeX-2B, CA:FeX-3B) that are largely driven by the endpoints you will be interacting with. Use the following logic to help select your desired Integration Profile Option from the dropdown menu of **Int. Prof. Option**. If you are exchanging:
 - A patient summary at the /Bundle endpoint, **Select the “Bundle (A)” Option** from the dropdown menu.
 - The supportive metadata resources (e.g., DocumentReference) as predicate step to support patient summary exchange, **Select the “Metadata (B)” Option** from the dropdown menu.
 - A Patient Resource as predicate step before patient summary exchange, **Select the “Single Resource (C)” Option** from the dropdown menu.
 - A patient summary using the \$summary operation, **Select the “Summary Operation (D)” Option** from the dropdown menu.



- After you have applied the filters, you will see the IHE Implementation (test case grouping) that is relevant to your system, Click **Add this IHE Implementation to this system**.



- This will add the relevant test cases to your system’s test plan, you can stay on the screen to repeat the process with other filters to add other IHE Implementations (test case groupings).
- After adding your desired IHE Implementations and closing out of the selection screen, you will see an updated list of Profiles and Actors that your system has registered for.
 - Note: If you selected an IHE Implementation with an actor of “Data Source”, you will also see an Integration Profile Option called “NONE – None” is automatically added. This is the grouping that houses the PS-CA and optional PS-Jurisdictional Validation tests.



- You can remove IHE Implementation selections any time before registration closes. After registration closes, you will need to contact interoperability@infoway-inforoute.ca to discuss manual removal. This is to reduce the risk of removed implementation selections impacting peer to peer matching closer to the event.
- Complete the remaining steps in your registration (refer to full list of steps in [Gazelle Registration manual](#)).

eReferral / eConsult No-Peer and Peer-to-Peer Testing

[Pan-Canadian eReferral / eConsult \(CA:eReC\)](#) is a specification for standardizing both payload content and the way it is exchanged. CA:eReC payload profiles are intentionally flexible to for information to change with the context of the transaction.

- For example, the MessageHeader profile allows for multiple types of resources to be supplied in MessageHeader.focus. However, for eReCm-1 (Add-ServiceRequest) the MessageHeader.focus is expected to be a ServiceRequest resource, whereas the in eReCm-6 (Notify New Request Processing) the MessageHeader.focus is expected to be a Task resource.

The various transactions tests will therefore encompass CA:eReC payload testing expectations. Participants are encouraged to review the [CA:eReC test data set](#) that includes example values for payloads in each of the transactions.

Decision Logic – eReferral / eConsult IHE Implementation

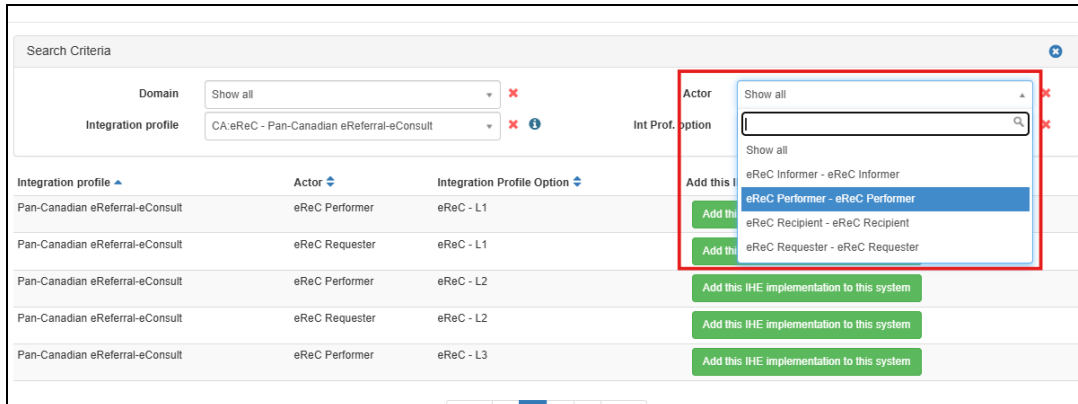
Use the following decision tree to apply desired filters. You can select and test any or all of the IHE implementations below by applying new filters after adding each IHE Implementation.

Note: Selection of the IHE Implementation will add No-Peer and Peer-to-Peer tests. Both No-Peer and Peer-to-Peer tests are required to be tested.

1. Start with **Integration Profile Criteria Filter**. Select **CA:eReC – Pan-Canadian eReferral-eConsult** from the dropdown menu.

The screenshot shows a web interface for filtering search criteria. At the top, there are four dropdown menus: 'Domain' (set to 'Show all'), 'Actor' (set to 'Show all'), 'Integration profile' (set to 'CA:eReC - Pan-Canadian eReferral-eConsult'), and 'Int Prof. option' (set to 'Show all'). Below these, a list of integration profiles is displayed, with 'CA:eReC - Pan-Canadian eReferral-eConsult' highlighted in blue. To the right of this list, there are several green buttons labeled 'Add this IHE implementation to this system'. At the bottom, there is a pagination control showing '1' of 2 pages.

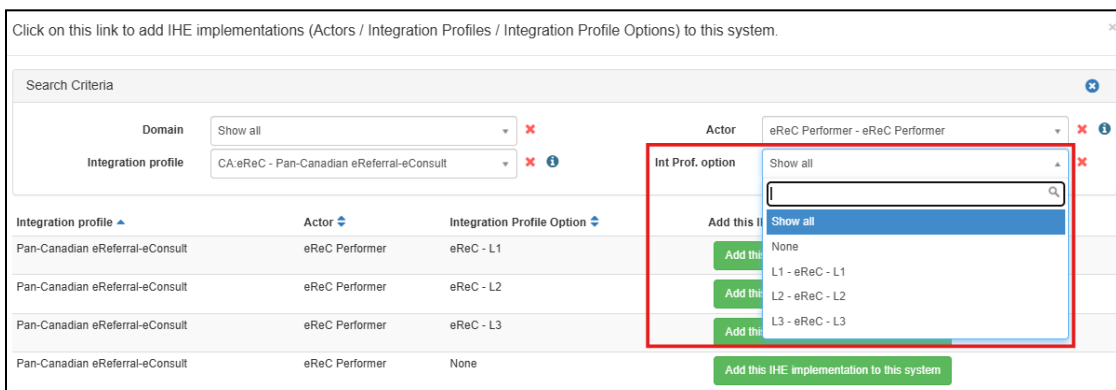
2. Next, apply the **Actor Criteria Filter**. Use the following logic to help select your desired actor from the dropdown menu of **Actor**.
 - If you produce and send FHIR Messages to an eReferral/eConsult Performer (i.e., Performing HCP or delegate), **Select the “eReC Requester” Actor** from the dropdown menu.
 - If you receive and respond to FHIR Messages from an eReferral/eConsult Requester (i.e., Requesting HCP or delegate), **Select the “eReC Performer” Actor** from the dropdown menu.



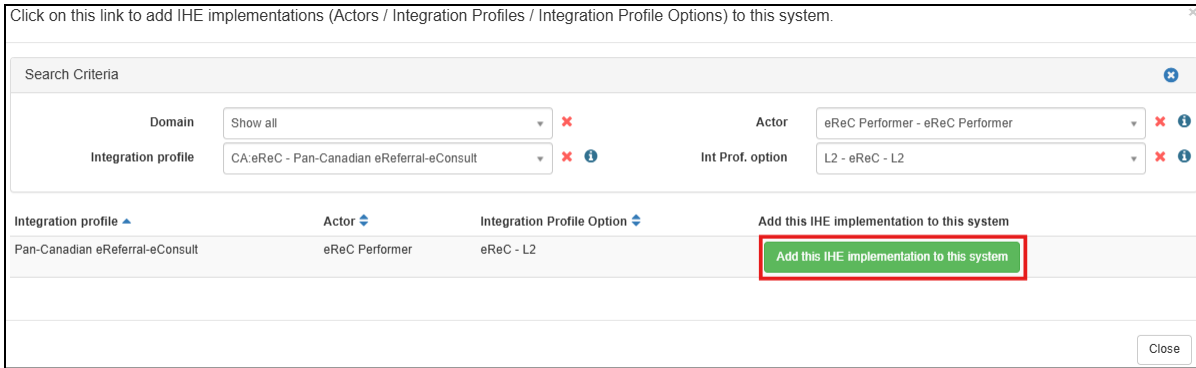
- Next, apply the **Int. Prof. Option Filter**. Integration Profile Options describe the patterns available to you in the specification (e.g., Level 1, Level 2, Level 3) that are largely driven by the maturity level of the actor to handle additional capabilities. The system maturity levels are [described in the specification](#). Use the [Messaging Compliance Table](#) outlining the required transactions for each maturity level and the following logic to help select your desired Integration Profile Option from the dropdown menu of **Int. Prof. Option**.

If your system is:

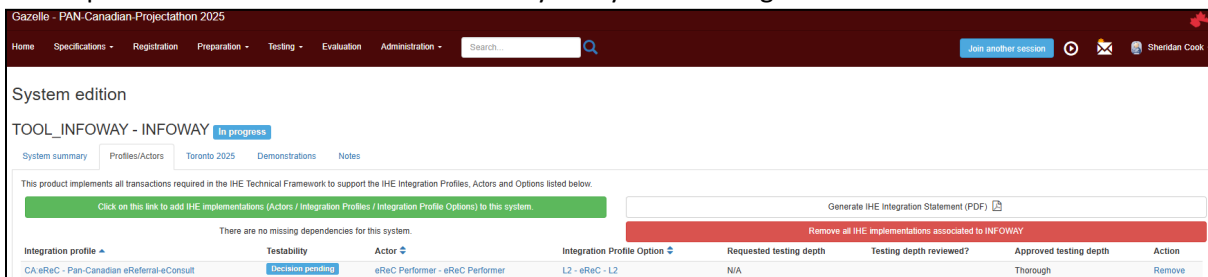
- Only able to support the minimum capabilities to send/receive an electronic referral request, **Select the “L1 – eReC – L1” Option** from the dropdown menu.
- Able to support the capabilities in Level 1 in addition to the ability to send/receive status updates to track the processing of a request, **Select the “L2 – eReC – L2” Option** from the dropdown menu.
- Able to support the capabilities in Level 1 and Level 2 in addition to the ability to support more advanced functions (e.g., sharing appointment information, secure messaging), **Select the “L3 – eReC – L3” Option** from the dropdown menu.



- After you have applied the filters, you will see the IHE Implementation (test case grouping) that is relevant to your system, Click **Add this IHE Implementation to this system**.



5. This will add the relevant test cases to your system's test plan, you can stay on the screen to repeat the process with other filters to add other IHE Implementations (test case groupings).
6. After adding your desired IHE Implementations and closing out of the selection screen, you will see an updated list of Profiles and Actors that your system has registered for.



7. You can remove IHE Implementation selections any time before registration closes. After registration closes, you will need to contact interoperability@infoway-inforoute.ca to discuss manual removal. This is to reduce the risk of removed implementation selections impacting peer to peer matching closer to the event.
8. Complete the remaining steps in your registration (refer to full list of steps in [Gazelle Registration manual](#)).