

Personal Community TrakCare Integration Install Checklist T2020

Date:

14 Dec 2020

Owner:

Tony Pepper

Version:

1.0

Status:

DRAFT

Audience

INTERNAL ONLY

Purpose

References

Interoperability Architecture

Production Considerations

Environments

IRIS Version

Access

Steps

1. Preparation
2. Checkpoint - Before IRIS Install on PC/UCR Server
3. Install HealthShare UCR
 - 3.1. Install HealthShare UCR
 - 3.2. Configure IRIS Settings
 - 3.3. Setup Demo UCR System
4. Install Personal Community
 - 4.1. Install Personal Community
 - 4.2. Configure IRIS Settings
 - 4.3. Run the Installer Wizard
 - 4.4. Set Interoperability System Default Settings
 - 4.5. Configure Production to auto-start
5. Checkpoint - After IRIS Install and PC/UCR Initialisation
6. Configure Personal Community
 - 6.1. Initialise Community
 - 6.2. Start Personal Community Production
 - 6.3. Define Workbench user login domain
 - 6.4. Create Workbench Administrator
 - 6.5. Uncheck HTTPS in PC
 - 6.6. Set up a Facility for PC in the UCR
 - 6.7. Configure PIX Notifications from UCR
 - 6.8. Create a service registry entry PIX Consumer Service
 - 6.9. Add entry to the PIX Notification Registry
 - 6.10. Set up the Registry for PIX Notifications
7. TrakCare Integration Manager HMF Setup
 - 7.1. Create HMF System namespace
 - 7.2. Generate API Service in HMF System Namespace
 - 7.3. Compile TC.hmf.System.Production
 - 7.4. Create Interoperability Credentials
 - 7.5. Setup HS Registry Link in TrakCare
 - 7.6. Configure TrakCare Integration Manager
 - 7.7. Configure Patient Match Configuration
 - 7.8. Create TrakAPI User
 - 7.9. Update HMFSYS Production
 - 7.10. Enable Inbound Web Services
8. TrakCare Edge Gateway Setup
 - 8.1. Setup Edge Gateway in UCR
 - 8.2. Configure Edge Gateway Production
 - 8.3. Configure ISC-TrakCare Facility in HSREGISTRY
 - 8.4. Configure Web Application to be Unauthenticated
 - 8.5. Modify SDA Data Segments
 - 8.6. Configure all productions to auto-start
 - 8.7. Restart all Productions
9. Create Interoperability Credentials
 - 9.1. Create Interoperability Credentials
10. Checkpoint - After TC/PC/UCR Installation
11. Configure TrakCare Personal Community Enrolment
 - 11.1. Add Personal Community fields to layout
 - 11.2. Enable PC in TrakCare Code Tables
 - 11.3. Configure PC Enrolment
 - 11.4. Add test email
 - 11.5. Add user to HSPortal_APIService
12. Checkpoint - After Configure PC Enrolment
 - 12.1. Enrol patient in TrakCare
 - 12.2. Verify PIX Notifications
 - 12.3. Activate Account in Personal Community
 - 12.4. View Health Record
 - 12.5. View Integration History
13. Maintenance
 - 13.1. Schedule Task to Purge Outdated Message Data

- 13.2. Test Backup Restore
- 14. Configure Personal Community for TrakCare
 - 14.1. Install Integration Package
 - 14.2. Configuring the REST Handler
 - 14.3. Send Account Status Change Notifications to TrakCare
 - 14.4. Accepting Documents Uploaded by Members
 - 14.5. Online Forms and Questionnaires
 - 14.6. Appointment Scheduling
- Demonstration Preparation
- 15. Configuring Personal Community
 - 15.1. Modify Event Calendar
 - 15.2. Modify Feature Controls
 - 15.3. Online Forms and Questionnaires
- 16. Customising Personal Community
 - 16.1. Modify the Public Application Structure and Behaviour
 - 16.2. Modify Categories on the Health Records Tab
 - 16.3. Rename My Documents tab to My Forms
 - 16.4. Specifying the Title for the Public Application Browser Tab
 - 16.5. Changing the Appearance of the Public Application
 - 16.6. Updating the Logo and Other Images
 - 16.7. Customizing the Theme across the Public Application
 - 16.8. Modifying the Common Tasks List
 - 16.9. Removing a Tab
 - 16.10. Reordering Menu Items
 - 16.11. Modifying Page Content
 - 16.12. Modify Health Records Columns
 - 16.13. Set Linux permissions and Ownerships
- 17. Filtering SDA Data In Personal Community
 - 17.1. Create Custom Class
 - 17.2. Define Class in Integration Manager
 - 17.3. Create Class Method for Segment
 - 17.4. Filter Active Allergies
 - 17.5. Filter Discharged Medications
- 18. How to reset a TrakCare Personal Community UCR environment?
 - 18.1. Purge Personal Community
 - 18.2. Reset UCR
 - 18.3. Reset TrakCare Enrolment Status

Purpose

This document details the steps for configuring the integration of TrakCare (TC), Personal Community (PC) and HealthShare Unified Care Record (UCR) specific for TrakCare 2020.

These steps were performed on two servers hosted in Sydney which you can access as a reference environment to check settings.

At this stage, this document is intended for an unsecured system to demonstrate functionality and does not include the steps for a secure highly available production deployment.

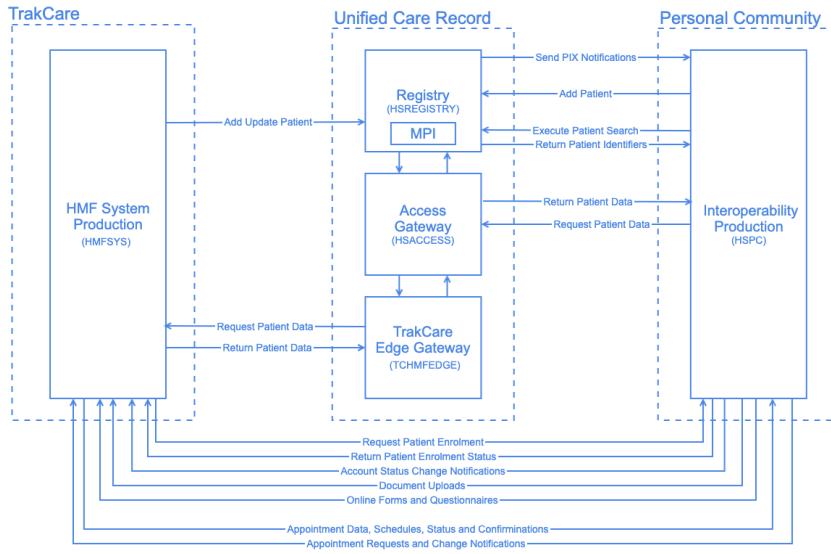
References

These documents were used to define the installation steps:

Reference	Summary
HealthShare Personal Community	This HealthShare guide introduces Personal Community and describes how to install, upgrade, and perform basic configuration for HealthShare Personal Community.
TrakCare Integration Package Releases	Personal Community release and future development documentation. Includes PC install steps.
Personal Community Troubleshooting	Troubleshooting help
HealthCare Messaging Framework (HMF) Personal Community Technical Integration Guide T2019 and T2020	TrakCare HMF reference document.

Interoperability Architecture

This diagram illustrates how TrakCare is integrated with Personal Community and HealthShare's Unified Care Record.



All Personal Community member and Workbench user activities use the interoperability productions to communicate with TrakCare and the Unified Care Record (UCR). For example, Personal Community receives its patient data from the UCR Registry and Access Gateway. This includes identifying data for patients, which consists of each patient's medical record number (MRN) and its assigning authority. All data aggregation occurs on the Access Gateway, such as with data for terminology and consent.

Personal Community does not store any of the patient data. Data is always fetched in real-time for the patient on login, which calls the UCR, which in turn calls TrakCare (as its defined as a pure query edge) to pull the required data for the patient.

When a patient is added or updated in TrakCare, TrakCare generates a patient SDA message which is sent directly to the UCR Registry. The patient is then available to be registered in Personal Community.

Patient enrolments in Personal Community are initiated in TrakCare. When new members (patients or their proxies) are enrolled in Personal Community, they are added to the UCR Registry.

When a member attempts to log in to Personal Community, the following occurs:

1. Personal Community looks up the member by executing a patient search in the UCR Registry.
2. The UCR returns patient identifiers and demographics.
3. After a successful login, Personal Community requests patient data from the UCR Access Gateway, which passes the request along to the TrakCare Edge Gateway, initiates a query request in TrakCare, and an SDA container with full clinical summary is returned to the TrakCare Edge Gateway.
4. When the UCR returns patient data, the production receives it and then passes it to the Personal Community public application; the member can then view their medical record.

The member, who is logged in, can then perform various actions, such as requesting appointments and downloading medical records.

As patient identifiers are updated in the Unified Care Record, the Registry sends PIX notifications to Personal Community. PIX notifications are sent whenever there is a change in the MPI.

Personal Community sends notifications to TrakCare when a patient's status has been changed, such as enrolling a patient, activating an account, or deactivating an account. This feature pushes notifications to TrakCare so that administrators can easily identify patients that are already enrolled in Personal Community.

Production Considerations

For a secure highly available production deployment, consider the following:

- PC web server(s) should be separate to the PC database server(s) and configured in a DMZ security zone.
- The PC and UCR database instances should be configured in a database mirror.
- All web traffic should use HTTPS encrypted with SSL/TLS.
- Default passwords should be changed to complex passwords.
- Remove extra HealthShare productions created by the `##class(HS.Util.Installer).InstallDemo()` method, e.g. HSEDGE1, HSEDGE2, HSODS etc.
- No web applications should require unauthenticated access, e.g. `/csp/healthshare/auxx-ref-hmfsys/`

Environments

Purpose	Server	IRIS Instances	OS	VM Specifications
TrakCare	Hostname: iscsydtcref IP address: 172.19.10.87	IRISTC (SuperServer port = 51773, WebServer = 52773)	RHEL8	<ul style="list-style-type: none"> CPU: 2 RAM: 4GB OS Disk: 30GB Data Disk: 100GB
Personal Community HealthShare UCR	Hostname: iscsydpcref IP address: 172.19.10.88	IRISPC (SuperServer port = 51773, WebServer = 52773) IRISHS (SuperServer port = 51774, WebServer = 52774)	RHEL8	<ul style="list-style-type: none"> CPU: 2 RAM: 4GB OS Disk 30GB Data Disk: 100GB

IRIS Version

Application	IRIS Version	Kit
TrakCare	IRIS for UNIX (Red Hat Enterprise Linux for x86-64) 2020.1 (Build 215_0_20146U) Tue Aug 18 2020 16:52:03 EDT	IRISHealth-2020.1.0.215.0.20146-lxrhx64.tar.gz
Personal Community	HealthShare 2020.1 [HealthShare Modules: Community Portal:16.0.7117 + Core:19.0.7117] - IRIS for UNIX (Red Hat Enterprise Linux for x86-64) 2019.1.1 (Build 615_1_19931U) Mon Jun 15 2020 14:35:04 EDT	HealthShare_PersonalCommunity-2020.1.1-7117-0-lxrhx64.tar.gz
HealthShare UCR	HealthShare 2020.1 [HealthShare Modules: Active Analytics:19.0.7019 + Core:19.0.7019 + Patient Index:19.0.7019] - IRIS for UNIX (Red Hat Enterprise Linux for x86-64) 2019.1.1 (Build 615_1_19931U) Mon Jun 15 2020 11:24:39 EDT	HealthShare_UnifiedCareRecord_Insight_PatientIndex-2020.1.1-7019-0-lxrhx64.tar.gz

Access

Application	Server	Web Application	URL	User / Password
Linux	iscsydtcref /iscsydpcref			trakadmin / traksydney
TrakCare	iscsydtcref	IRISTC Management Portal	http://iscsydtcref/csp/sys/UtilHome.csp http://iscsydtcref:52773/csp/sys/UtilHome.csp	superuser / SYS
TrakCare	iscsydtcref	IRISTC Web Gateway	http://iscsydtcref/csp/bin/Systems/Module.cxw http://iscsydtcref:52773/csp/bin/Systems/Module.cxw	CSPSystem / SYS
TrakCare	iscsydtcref	TrakCare	http://iscsydtcref/trakcare/web	tpepper / trakcare demo / demo mwest / demo trakapi / demo
PC	iscsydpcref	IRISPC Management Portal	http://iscsydpcref:52773/csp/sys/UtilHome.csp	superuser / SYS
PC	iscsydpcref	Personal Community	http://iscsydpcref:52773/public/index.html	Password: Sammy123
PC	iscsydpcref	Personal Community Workbench	http://iscsydpcref:52773/workbench/HSPortal.Workbench.Ui.Home.zen	superuser / SYS
HS UCR	iscsydpcref	IRISHS Management Portal	http://iscsydpcref:52774/csp/sys/UtilHome.csp	superuser / SYS
SOAP Credentials	iscsydtcref /iscsydpcref			ID: HS_Services HS_Services / HS_Services ID: HMF HS_Services / HS_Services

Steps



Ensure each checkpoint is completed before moving to the next step.

1. Preparation

Servers	Step	Comments
iscsydtcref /iscsydpcref	Create TrakCare and Personal Community Servers	Install OS updates. Configure network, DNS lookup, /etc/hosts (if required) Configure disk device, partition and filesystems. Configure OS ready for IRIS install TrakCare IRISHealth Linux Install Tuning Guide
iscsydtcref	Upload installation files	Copy of T2020 Australian Edition T2020-AUXX-REF from 23/10 /2020 including iris cpf
iscsydtcref	Install TrakCare	Using a copy of an existing TrakCare environment, configure IRIS and Apache.
iscsydpcref	Upload and extract Personal Community installation files	
iscsydpcref	Upload and extract HealthShare UCR installation files	
iscsydpcref	Configure OS ready for PC/UCR install	TrakCare IRISHealth Linux Install Tuning Guide
iscsydtcref /iscsydpcref	Configure backup	Install backup freeze/thaw scripts and assign Veeam backup tags 3rd party backup freeze and thaw scripts

2. Checkpoint - Before IRIS Install on PC/UCR Server

Ensure each checkpoint is completed before moving to the next step.

Check	Notes
TrakCare is installed	Login to TrakCare and navigate around a few screens
DNS Lookup	Ensure you can ping each server using hostname and FQDN.
Apache is running	apachectl status
IRIS OS groups and users exist	cat /etc/passwd cat /etc/group
PC & UCR install kits extracted but not installed	ls /trak/install
Check backup is working	Review Console Log (messages.log)

3. Install HealthShare UCR

Steps	Application	Instructions

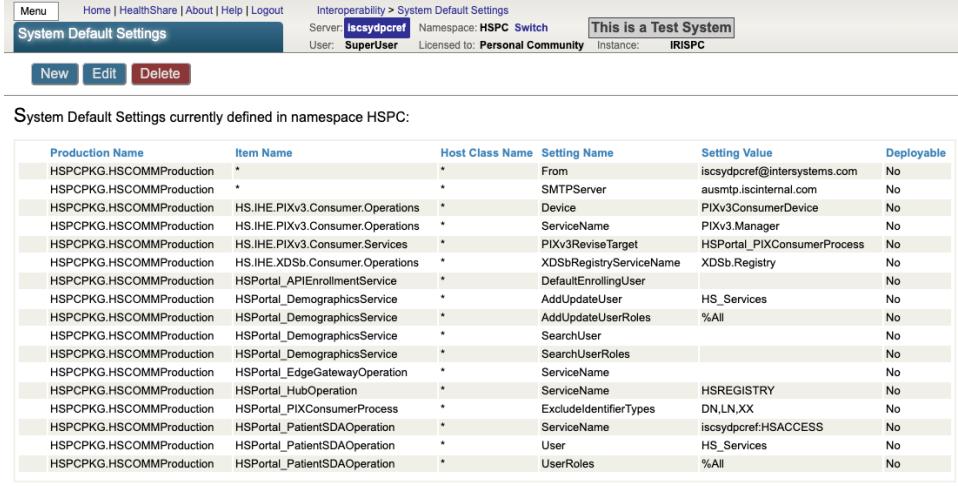
3.1. Install Health Share UCR	UCR	<p>Install HealthShare UCR IRIS kit - do not include Apache configuration</p> <pre># Preinstall iris.key mkdir -p /trak/hs/iris/mgr cp /trak/install/iris-hs.key /trak/hs/iris/mgr/iris.key chown irisowner:irisgrp /trak/hs/iris/mgr/iris.key chmod 664 /trak/hs/iris/mgr/iris.key # Install HealthShare UCR cd /trak/install/HealthShare_UnifiedCareRecord_Insight_PatientIndex-2020.1.1-7019-0-lnxrhx64 ISC_PACKAGE_INSTANCENAME="IRISHS" ISC_PACKAGE_INSTALLDIR="/trak/hs/iris" ISC_PACKAGE_UNICODE="Y" ISC_PACKAGE_INITIAL_SECURITY="Normal" ISC_PACKAGE_MGRUSER="irisowner" ISC_PACKAGE_MGRGROUP="irismgr" ISC_PACKAGE_USER_PASSWORD="SYS" ISC_PACKAGE_IRISUSER="irisusr" ISC_PACKAGE_IRISGROUP="irisgrp" ISC_PACKAGE_CSPSYSTEM_PASSWORD="SYS" ISC_PACKAGE_WEB_CONFIGURE="N" ISC_PACKAGE_STARTIRIS="Y" ./irisinstall_silent # Restart Apache apachectl restart</pre>
3.2. Configure IRIS Properties	UCR	<p>Configure IRIS Properties. Leave memory as is for now.</p> <pre># Start Terminal sudo -u irisowner -i irissession IRISHS -U %SYS # Configure startup properties set Status=##Class(Config.Startup).Get(.Properties) zw Properties set Properties("TerminalPrompt")="8,3,2" set Status=##Class(Config.Startup).Modify(.Properties) set ^%SYS("SystemMode")="TEST" # Configure journal properties set Status=##Class(Config.Journal).Get(.Properties) zw Properties set Properties("FreezeOnError")=1 set Status=##Class(Config.Journal).Modify(.Properties) # Restart iris instances iris stop irishs restart</pre>
3.3. Setup Demo UCR System	UCR	<p>Follow the steps in this document: Setting Up a Unified Care Record Demo System</p> <p>In an IRIS Terminal run</p> <pre>HSLIB> do ##class(HS.Util.Installer).InstallDemo()</pre>

4. Install Personal Community

This section follows this document <http://iscdocs.iscinternal.com/hslatest/csp/docbook/Doc.View.cls?KEY=HSPCIInstallation>

Steps	Application	Instructions
-------	-------------	--------------

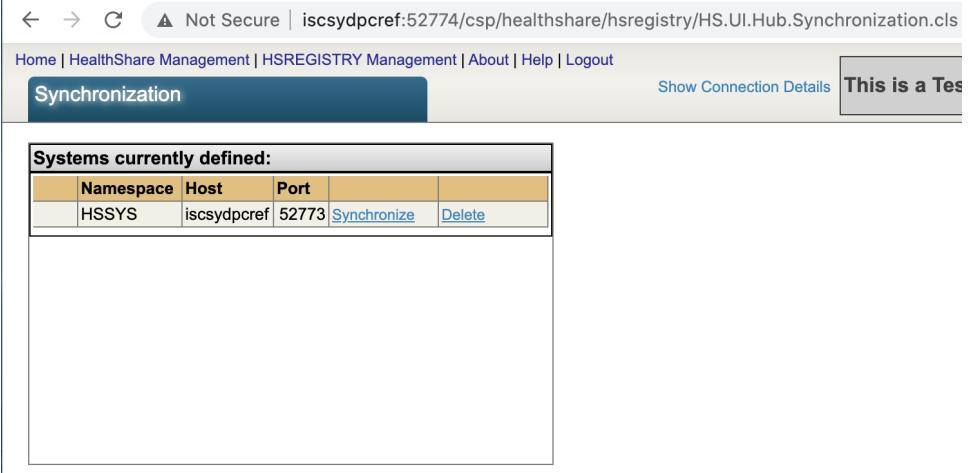
4.1. Install Personal Community	PC	<p>Install Personal Community IRIS kit configuring Apache.</p> <pre># Create IRIS apache conf file touch /etc/httpd/conf.d/iris.conf # Preinstall iris.key mkdir -p /trak/pc/iris/mgr cp /trak/install/iris-pc.key /trak/pc/iris/mgr/iris.key chown irisowner:irisgrp /trak/pc/iris/mgr/iris.key chmod 664 /trak/pc/iris/mgr/iris.key # Install Personal Community cd /trak/install/HealthShare_PersonalCommunity-2020.1.1-7117-0-lnxrhx64 ISC_PACKAGE_INSTANCENAME="IRISPC" ISC_PACKAGE_INSTALLDIR="/trak/pc/iris" ISC_PACKAGE_UNICODE="Y" ISC_PACKAGE_INITIAL_SECURITY="Normal" ISC_PACKAGE_MGRUSER="irisowner" ISC_PACKAGE_MGRGROUP="irismgr" ISC_PACKAGE_USER_PASSWORD="SYS" ISC_PACKAGE_IRISUSER="irisusr" ISC_PACKAGE_IRISGROUP="irisgrp" ISC_PACKAGE_CSPSYSTEM_PASSWORD="SYS" ISC_PACKAGE_WEB_CONFIGURE="Y" ISC_PACKAGE_WEB_SERVERTYPE="Apache" ISC_PACKAGE_WEB_APACHE_VERSION="2.4" ISC_PACKAGE_WEB_APACHE_USER="apache" ISC_PACKAGE_WEB_APACHE_CONF="/etc/httpd/conf.d/iris.conf" ISC_PACKAGE_WEB_GATEWAY_DIR="/opt/webgateway" ISC_PACKAGE_STARTIRIS="Y" ./irisinstall_silent # Restart Apache apachectl restart</pre>
4.2. Configure IRIS Properties	PC	<p>Configure IRIS properties. Leave memory as is for now</p> <pre># Start Terminal sudo -u irisowner -i irissession IRISPC -U %SYS # Configure startup properties set Status=##Class(Config.Startup).Get(.Properties) zw Properties set Properties("TerminalPrompt")="8,3,2" set Status=##Class(Config.Startup).Modify(.Properties) set ^%SYS("SystemMode")="TEST" # Configure journal properties set Status=##Class(Config.Journal).Get(.Properties) zw Properties set Properties("FreezeOnError")=1 set Status=##Class(Config.Journal).Modify(.Properties) # Restart iris instances iris stop irispc restart</pre>
4.3. Run the Installer Wizard	PC	<p>https://iscdocs.iscinternal.com/hslatest/csp/docbook/Doc.View.cls?KEY=HSPCIInstallation_Installing#HSPCIInstallation_Installing_InstallerWizard</p>

4.4. Set Interoperability System Default Settings	PC	<p>Set Interoperability > Configure > System Default Settings</p> <p>https://iscdocs.iscinternal.com/hslatest/csp/docbook/Doc.View.cls?KEY=HSPCInstallation_Installing#HSPCInstallation_Installing_DefaultSettings</p> <p>Ensure the HSPortal_PatientSDAOperation ServiceName must be identical to the UCR Service Registry Name.</p>  <table border="1"> <thead> <tr> <th>Production Name</th><th>Item Name</th><th>Host Class Name</th><th>Setting Name</th><th>Setting Value</th><th>Deployable</th></tr> </thead> <tbody> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>*</td><td>*</td><td>From</td><td>iscsydpcref@intersystems.com</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>*</td><td>*</td><td>SMTPServer</td><td>ausmtp.iscinternal.com</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HS.IHE.PIXv3.Consumer.Operations</td><td>*</td><td>Device</td><td>PIXv3ConsumerDevice</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HS.IHE.PIXv3.Consumer.Operations</td><td>*</td><td>ServiceName</td><td>PIXv3.Manager</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HS.IHE.PIXv3.Consumer.Services</td><td>*</td><td>PIXv3ReviseTarget</td><td>HSportal_PIXConsumerProcess</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HS.IHE.XDSb.Consumer.Operations</td><td>*</td><td>XDSbRegistryServiceName</td><td>XDSb.Registry</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_APIEnrollmentService</td><td>*</td><td>DefaultEnrollingUser</td><td></td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_DemographicsService</td><td>*</td><td>AddUpdateUser</td><td>HS_Services</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_DemographicsService</td><td>*</td><td>AddUpdateUserRoles</td><td>%All</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_DemographicsService</td><td>*</td><td>SearchUser</td><td></td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_DemographicsService</td><td>*</td><td>SearchUserRoles</td><td></td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_EdgeGatewayOperation</td><td>*</td><td>ServiceName</td><td></td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_HubOperation</td><td>*</td><td>ServiceName</td><td>HSREGISTRY</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_PIXConsumerProcess</td><td>*</td><td>ExcludeIdentifierTypes</td><td>DN,LN,XX</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_PatientSDAOperation</td><td>*</td><td>ServiceName</td><td>iscsydpcref:HSACCESS</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_PatientSDAOperation</td><td>*</td><td>User</td><td>HS_Services</td><td>No</td></tr> <tr> <td>HSPCPKG.HSCOMMPProduction</td><td>HSPortal_PatientSDAOperation</td><td>*</td><td>UserRoles</td><td>%All</td><td>No</td></tr> </tbody> </table>	Production Name	Item Name	Host Class Name	Setting Name	Setting Value	Deployable	HSPCPKG.HSCOMMPProduction	*	*	From	iscsydpcref@intersystems.com	No	HSPCPKG.HSCOMMPProduction	*	*	SMTPServer	ausmtp.iscinternal.com	No	HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Operations	*	Device	PIXv3ConsumerDevice	No	HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Operations	*	ServiceName	PIXv3.Manager	No	HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Services	*	PIXv3ReviseTarget	HSportal_PIXConsumerProcess	No	HSPCPKG.HSCOMMPProduction	HS.IHE.XDSb.Consumer.Operations	*	XDSbRegistryServiceName	XDSb.Registry	No	HSPCPKG.HSCOMMPProduction	HSPortal_APIEnrollmentService	*	DefaultEnrollingUser		No	HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	AddUpdateUser	HS_Services	No	HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	AddUpdateUserRoles	%All	No	HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	SearchUser		No	HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	SearchUserRoles		No	HSPCPKG.HSCOMMPProduction	HSPortal_EdgeGatewayOperation	*	ServiceName		No	HSPCPKG.HSCOMMPProduction	HSPortal_HubOperation	*	ServiceName	HSREGISTRY	No	HSPCPKG.HSCOMMPProduction	HSPortal_PIXConsumerProcess	*	ExcludeIdentifierTypes	DN,LN,XX	No	HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	ServiceName	iscsydpcref:HSACCESS	No	HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	User	HS_Services	No	HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	UserRoles	%All	No
Production Name	Item Name	Host Class Name	Setting Name	Setting Value	Deployable																																																																																																									
HSPCPKG.HSCOMMPProduction	*	*	From	iscsydpcref@intersystems.com	No																																																																																																									
HSPCPKG.HSCOMMPProduction	*	*	SMTPServer	ausmtp.iscinternal.com	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Operations	*	Device	PIXv3ConsumerDevice	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Operations	*	ServiceName	PIXv3.Manager	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HS.IHE.PIXv3.Consumer.Services	*	PIXv3ReviseTarget	HSportal_PIXConsumerProcess	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HS.IHE.XDSb.Consumer.Operations	*	XDSbRegistryServiceName	XDSb.Registry	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_APIEnrollmentService	*	DefaultEnrollingUser		No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	AddUpdateUser	HS_Services	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	AddUpdateUserRoles	%All	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	SearchUser		No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_DemographicsService	*	SearchUserRoles		No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_EdgeGatewayOperation	*	ServiceName		No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_HubOperation	*	ServiceName	HSREGISTRY	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_PIXConsumerProcess	*	ExcludeIdentifierTypes	DN,LN,XX	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	ServiceName	iscsydpcref:HSACCESS	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	User	HS_Services	No																																																																																																									
HSPCPKG.HSCOMMPProduction	HSPortal_PatientSDAOperation	*	UserRoles	%All	No																																																																																																									
4.5. Configure Production to auto-start	PC	<p>In IRIS Terminal, in the HSPC namespace set production HSPCPKG.HSCOMMPProduction to auto-start.</p> <pre>zn "HSPC" write ##class(Ens.Director).SetAutoStart("HSPCPKG.HSCOMMPProduction")</pre>																																																																																																												

5. Checkpoint - After IRIS Install and PC/UCR Initialisation

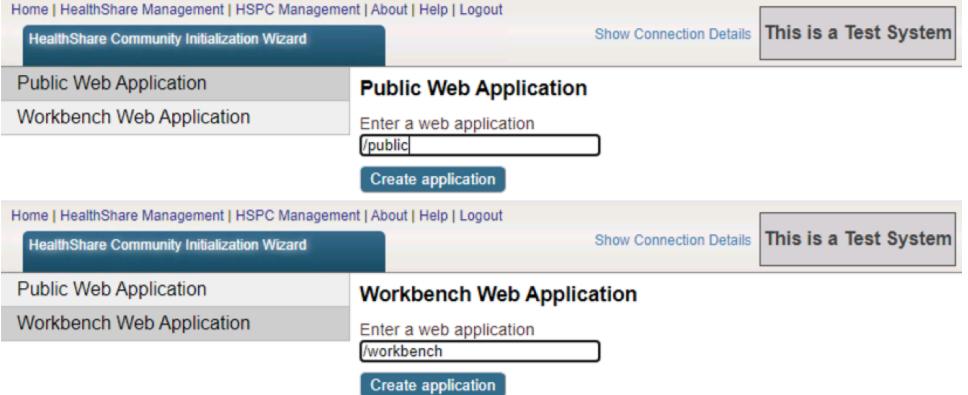
Ensure each checkpoint is completed before moving to the next step.

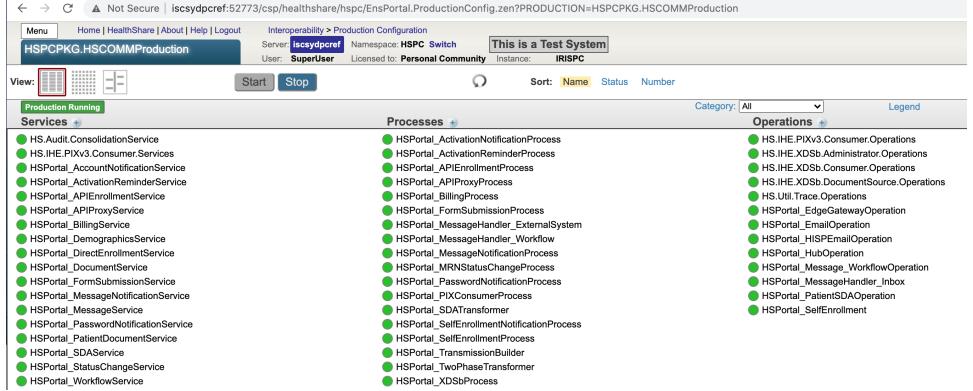
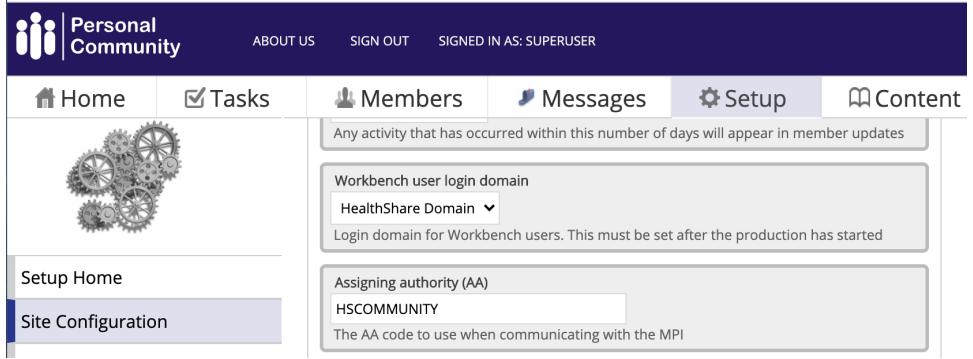
Check	Application	Notes
Personal Community Workbench login	PC	Login to workbench http://iscsydpcref:52773/workbench/HSPortal.Workbench.UI.Home.zen
Personal Community login	PC	Access page only - can't log in yet. http://iscsydpcref:52773/public/index.html

Verify that Personal Community has been synchronised with UCR instance	UCR	<p>Login to IRISHS Management Portal</p> <p>Click HealthShare > HSREGISTRY > Other Management > Synchronization.</p> <p>Confirm that the HSSYS namespace for your Personal Community host and port is listed.</p> <p>http://iscsydpcref:52774/csp/sys/UtilHome.csp</p> 
--	-----	--

6. Configure Personal Community

This section follows this document <http://iscdocs.iscinternal.com/hslatest/csp/docbook/Doc.View.cls?KEY=HSPCInstallation>

Steps	Application	Instructions
6.1. Initialise Community	PC	<p>Initialise Community and create web applications.</p> <p>Follow this guide: Setting Up the Personal Community Web Applications and Starting Personal Community Portal > HealthShare > HSPC > Initialise Community</p>  <p>⚠️ While testing, Turn off Web Gateway Caching For the Portal by changing public Web Application > ServeFiles = Always</p>

6.2. Start Personal Community Production	PC	<p>Open Personal Community production in the HSPC namespace. Start Production</p> <p>Portal > Interoperability > Configure > Production</p> 
6.3. Define Workbench user login domain	PC	<p>The user login domain is an authentication domain that specifies a logical grouping of users and controls a set of common characteristics of Workbench users.</p> <p>Setting Up and Specifying an Authentication Domain</p> 
6.4. Create Workbench Administrator	PC	<p>Follow these steps if you want to use a dedicated workbench admin user.</p> <p>Creating a Workbench Administrator</p>
6.5. Uncheck HTTPS in PC	PC	<p>In the PC Workbench, uncheck Personal Community SOAP APIs because we haven't configured SSL yet.</p> <p>Setup > Site Configuration > Personal Community SOAP APIs</p>

6.6. Set up a Facility for PC in the UCR

UCR

For Personal Community to be able to retrieve information from a Unified Care Record, it must have a facility defined in the Unified Care Record Registry.

Setting up a Facility for Personal Community in the Unified Care Record Registry

Set up HSCommunity Facility for Personal Community in the Unified Care Record Registry.

The screenshot shows a software interface titled "Facility Registry". At the top, there is a toolbar with icons for Back, Forward, Home, and Help. Below the toolbar is a header bar with tabs: "Facility Registry" (selected), "Data", "Connectors", and "Details". A sub-header "Data, Connectors, Details" is also present. The main area contains a table with columns: Name, FacilityCode, Description, Contact_Facility, and GroupName. There are four rows in the table:

Name	FacilityCode	Description	Contact_Facility	GroupName
I_CMC	I_CMC			
HSCOMMUNITY	HSCOMMUNITY	HSCOMMUNITY		HSCOMMUNITY
HSCOMMUNITY	HSCOMMUNITY	HSCOMMUNITY		HSCOMMUNITY

Below the table, there is a form with fields for FacilityCode (HSCOMMUNITY), Name (HS COMMUNITY), Description (HSCOMMUNITY), Contact_Facility (None), Contact_Organization (None), Contact_Email (None), Contact_Phone (None), Internal_IP (192.168.1.100), Edge_Gateway (None), Direct_Connections (checked), IP_Address (192.168.1.100), and Order (None). At the bottom right of the form are buttons for New, Save, Cancel, and Close.

6.7. Configure PIX Notifications from UCR

UCR

Personal Community must be able to receive PIX notifications from the Unified Care Record. For it to receive these notifications, configure Unified Care Record to send them to Personal Community.

Configuring PIX Notifications from the Unified Care Record Registry

Create OID Identity for the Personal Community PIX Consumer

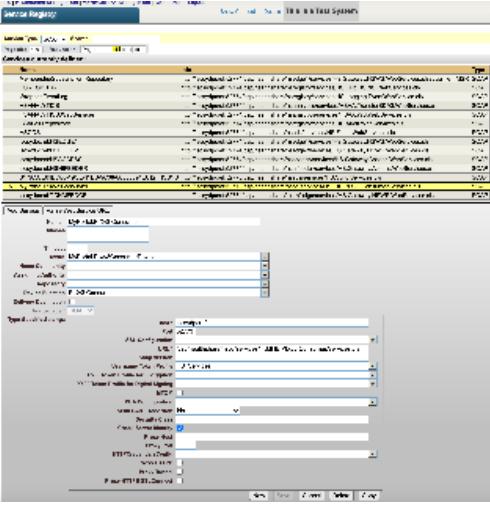
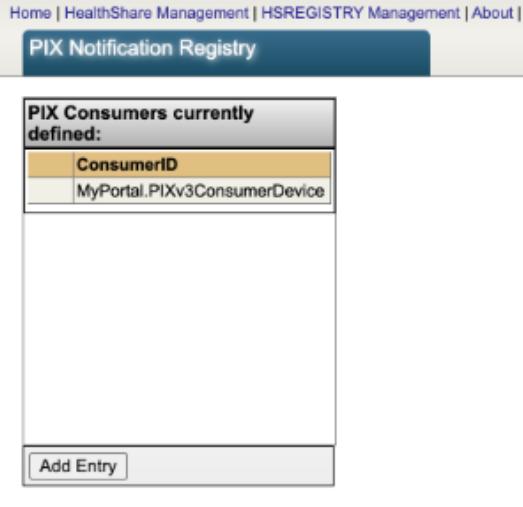
- Login to HS Portal and switch to HSREGISTRY namespace
- Go to IHE Configuration > OID Registry
- Add OID
 - Code: MyPortal.PIXv3ConsumerDevice
 - OID: 1.3.6.4.1.21367.2010.1.2.300.4.1
 - Description: InterSystems Personal Community
 - Type: check Device

The screenshot shows the 'Add OID' dialog box. The 'Code' field contains 'MyPortal.PIXv3ConsumerDevice'. The 'OID' field contains '1.3.6.4.1.21367.2010.1.2.300.4.1'. The 'Description' field contains 'InterSystems Personal Community'. In the 'Types' section, the 'Device' checkbox is checked. Other options like 'AssigningAuthority', 'CodeSystem', 'Facility', 'Gateway', 'HomeCommunity', 'LicensingAuthority', 'Organization', 'Repository', and 'SoftwareProduct' are unchecked. At the bottom, there are 'New', 'Save', 'Cancel', and 'Delete' buttons. A note at the bottom says '* indicates required field. At least one of OID or URL are required.' and 'Last update:'.

Create OID Identity for TrakCare

- Add OID
 - Code: ISC-TrakCare
 - OID: 2.16.840.1.113883.3.86.4
 - Description: InterSystems TrakCare
 - Types: Assigning Authority, Facility

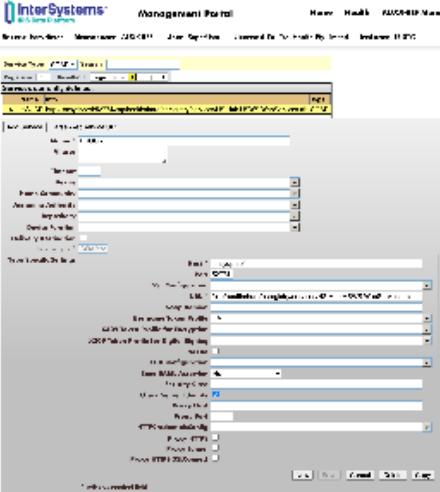
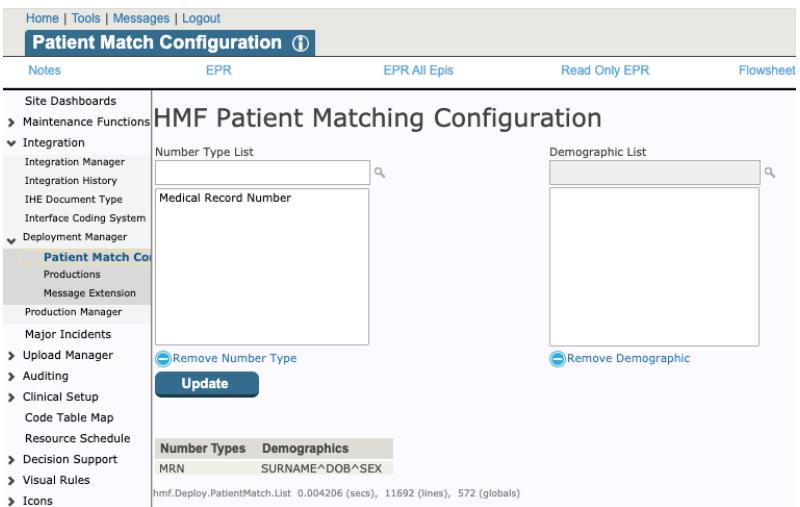
The screenshot shows the 'OID Registry' interface. At the top, it says 'OID Registry Items currently defined'. Below is a table with columns: IdentityCode, Type, OID, Description, URL, and Alias. The table lists several entries, including 'MyPortal.ConsumerDevice' and 'ISC-TrakCare'. Below the table is a 'Create New Identity' dialog. It has fields for 'IdentityCode' (set to 'ISC-TrakCare'), 'OID' (set to '2.16.840.1.113883.3.86.4'), and 'Description' (set to 'InterSystems TrakCare'). Under 'Types', the 'Assigning Authority' and 'Facility' checkboxes are checked. Other options like 'CodeSystem', 'Device', etc., are unchecked. At the bottom, there are 'OK', 'Save', 'Cancel', and 'Delete' buttons.

6.8. Create a service registry entry PIX Consumer Service	UCR	<p>In the Management Portal for your Personal Community instance, locate the URL for the PIX Consumer Service:</p> <ul style="list-style-type: none"> • http://iscsydpcref:52773/csp/healthshare/hspc/services/HS.IHE.PIxv3.Consumer.Services.cls <p>In the Management Portal for the Unified Care Record, select the namespace for the Registry and navigate to HealthShare > Registry Management > Service Registry</p> <ul style="list-style-type: none"> • Name: MyPortal.PIxv3.Consumer • Device: MyPortal.PIxv3ConsumerDevice • Device Function: PIxv3.Consumer • Host: iscsydpcref • Port: 52773 • URL: /csp/healthshare/hspc/services/HS.IHE.PIxv3.Consumer.Services.cls • Username Token Profile: HS_Services • Send SAML Assertion: No • Check Server Identity: Check 
6.9. Add entry to the PIX Notification Registry	UCR	<p>Follow steps in Initially Setting Up PIX Notifications</p> <p>In the Management Portal for the Unified Care Record, add an entry to the PIX Notification Registry.</p> <p>Consumer Device Code: MyPortal.PIxv3ConsumerDevice</p> 

6.10. Set up the Registry for PIX Notifications	UCR	<p>Personal Community must be able to receive PIX notifications from the Unified Care Record.</p> <p>Specifying Reply Code Actions for PIX Notifications</p> <p>In the HSREGISTRY Production modify items:</p> <ul style="list-style-type: none"> • Add process PIX Manager Process <ul style="list-style-type: none"> • Business Process Class: HS.IHE.PIX.ManagerProcess • DeviceID: PIXv3ManagerDevice • Add operation PIXv3 Notification Operation: <ul style="list-style-type: none"> • Operation Class: HS.Util.SOAPClient.Operations • Operation Name: PIXv3.Notification.Operations • Reply Code Action: E=RF • Modify operation HS.HubMPI.Manager <ul style="list-style-type: none"> • PIXManager: HS.IHE.PIX.ManagerProcess
--	-----	---

7. TrakCare Integration Manager HMF Setup

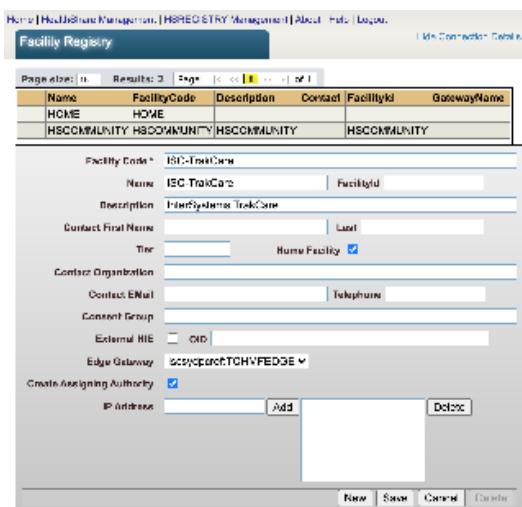
Steps	Application	Instructions
7.1. Create HMF System namespace	TC	<p>Create HMF System namespace called AUXX-REF-HMFSYS copying TrakCare namespace AUXX-REF default databases and global mappings.</p> <p>The global mapping of the namespace AUXX-REF-HMFSYS is the same as the TrakCare AUXX-REF namespace, except ^Ens* must be mapped to the new blank database.</p> <p>As a general rule no productions should run in the TrakCare application namespace. The HMF System production and EPS should run in their own namespace.</p>
7.2. Generate API Service in HMF System Namespace	TC	<p>In the HMF System namespace AUXX-REF-HMFSYS, generate the API Service by running:</p> <pre>do ##class(TC.api.Generator).RegenHMFAPIService()</pre>
7.3. Compile TC.hmf.System.Production	TC	<p>Manually compile the TC.hmf.System.Production in the HMF System namespace AUXX-REF-HMFSYS</p> <p>Open and start the system production, check no error exist.</p>
7.4. Create Interoperability Credentials	TC	<p>In HMFSYS namespace, Interoperability > Configure > Credentials, create credentials for SOAP web services communications.</p> <ul style="list-style-type: none"> • ID: HMF • User name: HS_Services • Password: HS_Services

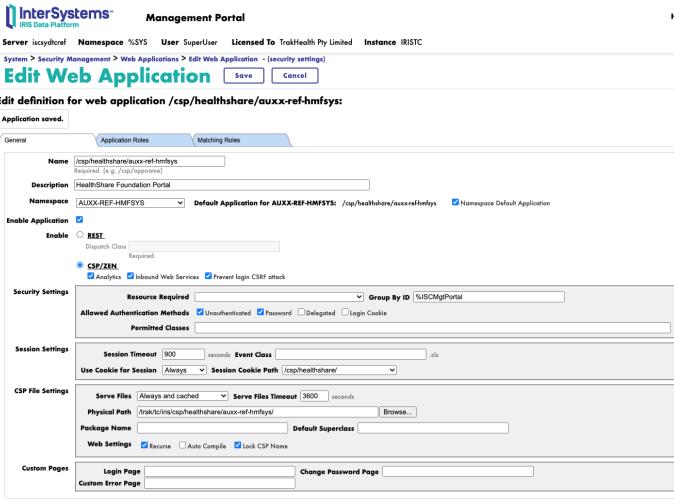
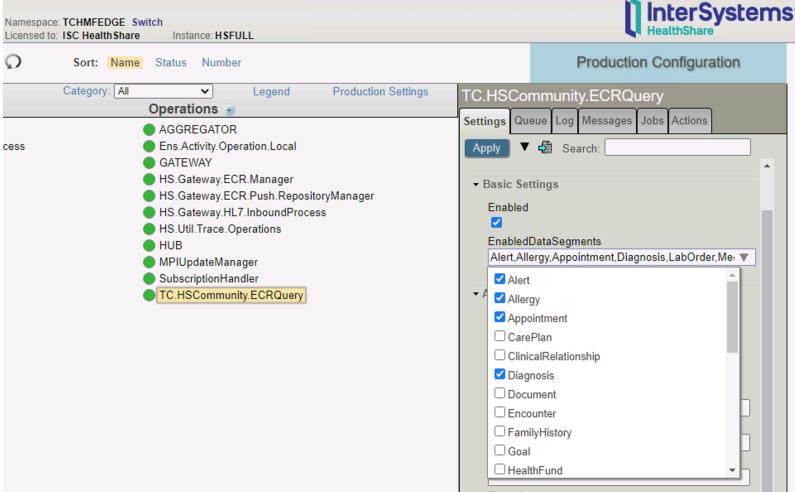
7.5. Setup HS Registry Link in TrakCare	TC	<p>In the TrakCare Management Portal, go to Health > Service Registry</p> <p>Add Service Registry for UCR instance</p> <ul style="list-style-type: none"> • Name: HSUCR • Host: iscsydpref • Port: 52774 • URL: /csp/healthshare/hsregistry/services/HS.Hub.HSWS.WebServices.cls • Username Token Profile: HMF • Send SAML Assertion: No • Check Server Identity: Check 
7.6. Configure TrakCare Integration Manager	TC	<p>In TrakCare > Tools > Integration > Integration Manager</p> <p>Update HS Registry Link: HSUCR</p>
7.7. Configure Patient Match Configuration	TC	<p>In TrakCare > Tools > Integration > Deployment Manager</p> <p>Add Patient Matching Configuration, e.g.</p> <ul style="list-style-type: none"> • Number Type: MRN • Demographics: SURNAME^DOB^SEX 
7.8. Create TrakAPI User	TC	<p>In TrakCare, create TrakCare API user:</p> <ul style="list-style-type: none"> • Code: TrakAPI • Description: TrakCare API User • Password: Enter unique password • Logon Location: Location with execute permission • Enable API Access: Check <p>Security group and access profile are not used.</p>

7.9. Update HMFSYS Production	TC	<p>Update HMFSYS Production TC.hmf.System.Production</p> <p>Add operation to HMFSYS production for direct outbound integration with HSREGISTRY:</p> <ul style="list-style-type: none"> • TC.hmf.System.Operation.Outbound.HSRemoteOperations <ul style="list-style-type: none"> • ServiceName: HSUCR • SOAP Credentials: HMF <p>Add service to HMFSYS production for direct integration with Personal Community for inbound messaging:</p> <ul style="list-style-type: none"> • TC.hmf.System.Service.Inbound.HSCommunity <p>Add operation to HMFSYS production for direct integration with Personal Community for outbound and inbound messaging:</p> <ul style="list-style-type: none"> • TC.hmf.System.Operation.Outbound.HSCommunity <ul style="list-style-type: none"> • SOAP Credentials: HMF
7.10. Enable Inbound Web Services	TC	<p>Enable inbound web services (SOAP) for HMFSYS namespace web application</p> <ul style="list-style-type: none"> • Portal > System Administration > Security > Applications > Web Applications • Select HMFSYS web application /csp/healthshare/auxx-ref-hmfsys • Check Inbound Web Services

8. TrakCare Edge Gateway Setup

Steps	Application	Instructions
8.1. Setup Edge Gateway in UCR	UCR	<p>Setup an Edge Gateway for interacting with TrakCare to handle requests from the Portal to TrakCare, including the query that the Portal initiates to retrieve the Patient Clinical data. The patient update feed from TrakCare is sent directly to the HSRegistry and links to this Edge via the defined Assigning Authority / Facility ISC-TrakCare.</p> <p>HealthShare > Installer Wizard > Configure Edge Gateway then click Activate</p> <p>Local Name: TCHMFEDGE</p>

8.2. Configure Edge Gateway Production	UCR	<p>Manually configure TrakCare HMF Edge Gateway production (TCHMFEDGE).</p> <p>Import these classes TCHMFEDGE_20201202.xml into the TCHMFEDGE Edge Gateway namespace.</p> <pre>TC.hmf.Utils.cls Custom.HMF.TRAKTEST.wsClient.QueryTrak.cls Custom.HMF.TRAKTEST.Gateway.TESTPORTALADAP.HS.Community.ECRQueryOperation.cls</pre> <p>Next we need to configure the TCHMFEDGE production:</p> <ul style="list-style-type: none"> In Interoperability > Configure > Production, open production TCHMFEDGEPKG. EdgeGatewayProduction Update the Production Settings <p>CacheType: PureQuery</p> <ul style="list-style-type: none"> Add business operation to the edge gateway production: <pre>Class: Custom.HMF.TRAKTEST.Gateway.TESTPORTALADAP.HS.Community.ECRQueryOperation Operation Name: TC.HSCommunity.ECRQuery WSClient: Custom.HMF.TRAKTEST.wsClient.QueryTrak WSCredentials: HS_Services</pre> <ul style="list-style-type: none"> Modify business operation HS.Gateway.ECR.Manager <p>QueryOperation: TC.HSCommunity.ECRQuery</p> <ul style="list-style-type: none"> In Studio, open Class Custom.HMF.TRAKTEST.wsClient.QueryTrak and update parameter Location URL to TrakCare HMFSYS web application. Note this url MUST contain the HMFSYS namespace. <pre>Parameter LOCATION = "http://iscsyderef:52773/csp/healthshare/auxx-ref-hmfsys/TC.hmf.System.Service.Inbound.Query.cls";</pre>
8.3. Configure ISC-TrakCare Facility in HSREGISTRY	UCR	<p>In HealthShare > Registry Management > Facility Registry create facility registry for ISC-TrakCare to point at new query edge gateway.</p> <p>All patients from Trakcare are registered to this Facility and is used to direct all Portal requests to the TCHMFEDGE gateway.</p> <ul style="list-style-type: none"> Facility Code: ISC-TrakCare Name: ISC-TrakCare Home Facility: Check (required for direct AddUpdateHub requests) Edge Gateway: iscsydpref:TCHMFEDGE Create Assigning Authority: Check  <p>The screenshot shows the Facility Registry page with a table of existing facilities and a detailed view of the ISC-TrakCare facility being created. The facility details include:</p> <ul style="list-style-type: none"> Facility Code: ISC-TrakCare Name: ISC TrakCare Description: InterSystems TrakCare Contact First Name: Last Title: Home Facility Contact Organization: Contact Email: Contact Telephone: Comment Group: External HIE: CND Edge Gateway: iscsydpref:TCHMFEDGE Create Assigning Authority: checked IP Address:

8.4. Configure Web Application to be Unauthenticated	TC	<p>In TrakCare IRIS instance, set HMFSYS Web Application defined in web service class /csp/healthshare /auxx-ref-hmfsys/ to unauthenticated and allow Inbound Web Service.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>! Check Unauthenticated to workaround SOAP authentication issues - needs to be reviewed before going into production.</p> </div> 
8.5. Modify SDA Data Segments	UCR	<p>For performance reasons, in the TCHMFEDGE Production, in the TC.HSCommunity.ECRQuery Operation, check the EnabledDataSegments property to only query the segments required by Personal Community.</p> <p>For example, EnabledDataSegments = Alert,Allergy,Appointment,Diagnosis,LabOrder,Medication,Patient,Result</p> 
8.6. Configure all productions to auto-start	UCR	<p>In IRIS Terminal set all productions to auto-start.</p> <pre> zn "HSACCESS" write ##class(Ens.Director).SetAutoStart("HSACCESSPKG.AccessGatewayProduction") zn "HSREGISTRY" write ##class(Ens.Director).SetAutoStart("HSREGISTRYPKG.HubProduction") zn "TCHMFEDGE" write ##class(Ens.Director).SetAutoStart("TCHMFEDGEPKG.EdgeGatewayProduction") </pre> <p>In HSREGISTRY namespace, Portal > Interoperability > Manage > Auto-Start Production, set HSREGISTRYPKG.HubProduction=1, because Productions with the highest number start first.</p>

8.7. Restart all Productions	UCR/PC/TC	Stop/start productions in TrakCare, Personal Community and HealthShare UCR.
-------------------------------------	-----------	---

9. Create Interoperability Credentials

Steps	Application	Instructions
9.1. Create Interoperability Credentials	UCR/PC	<p>Interoperability credentials are your authorisation keys to connect to systems and applications outside IRIS.</p> <p>Prior to setup, obtain a set of valid TrakCare credentials for calling a web service. In this example, use HMF.</p> <p>In the HSPC, HSREGISTRY, HSACCESS and TCHMFEDGE namespaces, create credentials for SOAP web services communications to TrakCare.</p> <p>Portal > Interoperability > Configure > Credentials</p> <ul style="list-style-type: none"> • ID: HMF • User name: HS_Services • Password: HS_Services

10. Checkpoint - After TC/PC/UCR Installation

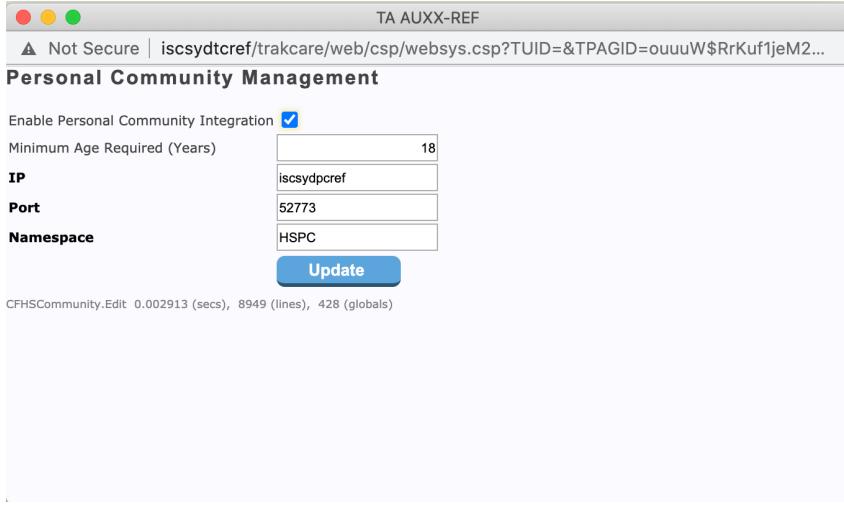
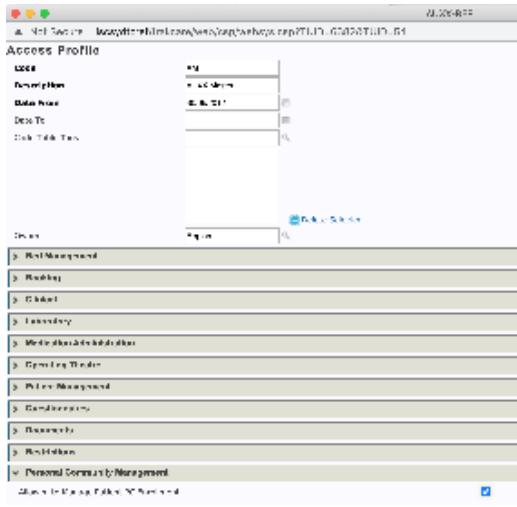
Ensure each checkpoint is completed before moving to the next step.

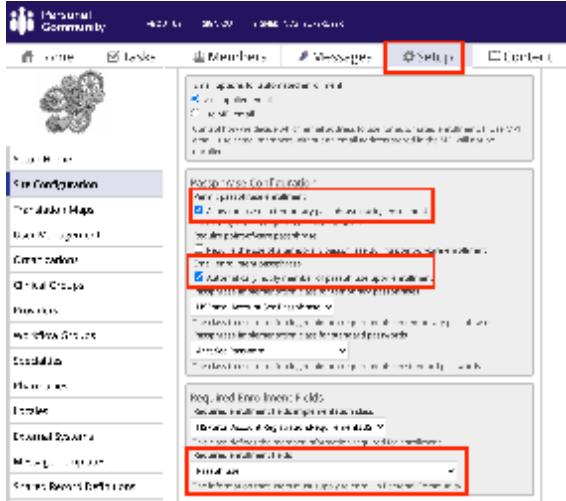
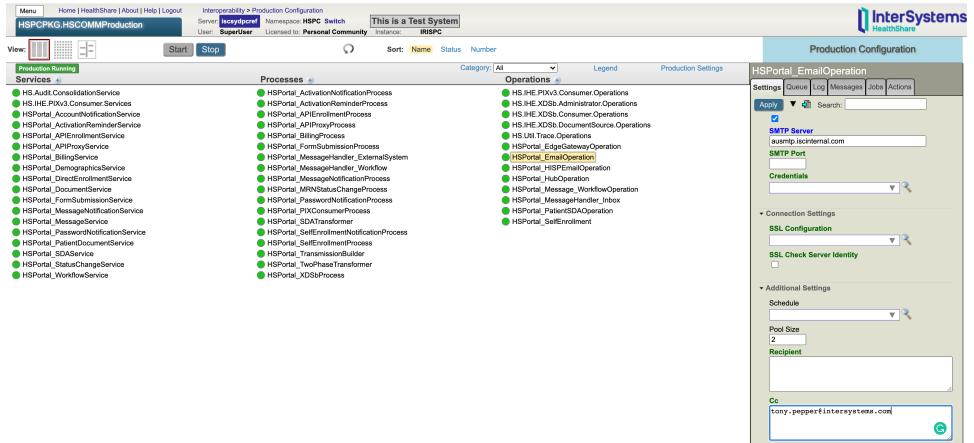
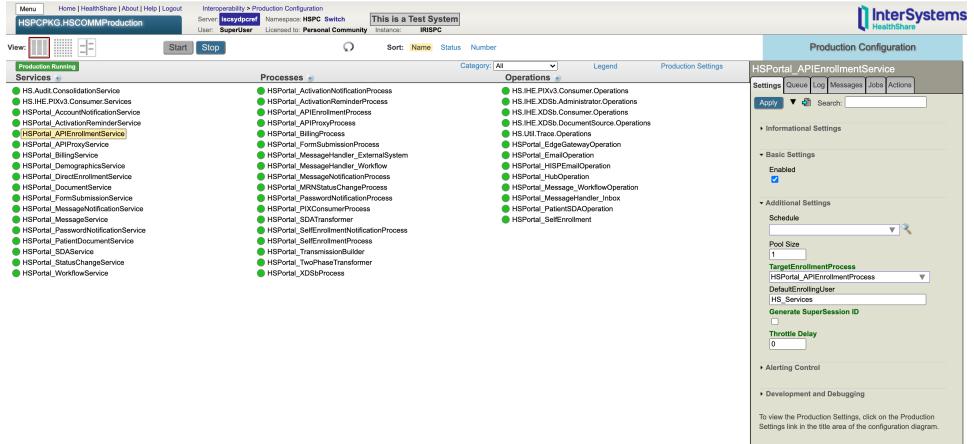
Check	Application	Notes																						
TrakCare Integration Manager	TC	<p>In TrakCare > Tools > Integration > Production Manager, ensure HMF System Production is running.</p> <p>Production Manager System Productions</p> <p>System Router</p> <p>Refresh System and Router Status Show Details for System and Router Production</p> <p>Gateway Productions</p> <p>Show Enabled Only <input checked="" type="checkbox"/> Find Refresh All Auto Refresh <input type="checkbox"/> Hide Ensemble Components <input checked="" type="checkbox"/></p> <table border="1"> <thead> <tr> <th>Production</th> <th>Date</th> <th>Portal</th> <th>Production Status</th> <th>Status Error</th> <th>Interface Status</th> <th>Interfaces</th> <th>Generated</th> <th>Locked</th> <th>Enabled</th> <th>Refresh</th> </tr> </thead> <tbody> <tr> <td>HL7FILEOUT</td> <td></td> <td></td> <td>Not known</td> <td></td> <td>0%</td> <td></td> <td>OK</td> <td></td> <td></td> <td>Refresh</td> </tr> </tbody> </table> <p>Error Log Refresh in Progress -non-hmf.Manager.Inventory 0.036351 (secs), 94189 (lines), 2843 (globals)</p>	Production	Date	Portal	Production Status	Status Error	Interface Status	Interfaces	Generated	Locked	Enabled	Refresh	HL7FILEOUT			Not known		0%		OK			Refresh
Production	Date	Portal	Production Status	Status Error	Interface Status	Interfaces	Generated	Locked	Enabled	Refresh														
HL7FILEOUT			Not known		0%		OK			Refresh														
TrakCare Patient Update	TC	Login to TrakCare and update a patient's demographics. This should send patient record to the HSREGISTRY and to Personal Community.																						
TrakCare Integration History	TC	Review the SDA message in: TrakCare > Tools > Integration Manager > Integration History																						
Search for patient in HSREGISTRY	UCR	<p>In the UCR instance, switch to HSREGISTRY namespace and go to:</p> <p>Portal > HealthShare > Registry Management > Patient Registry, then click Find Patient</p> <p>Patient Registry</p> <p>Patient: Find Patient.. MPI ID:</p> <p>Patient Search</p> <p>Select a patient by clicking the patient name.</p> <table border="1"> <thead> <tr> <th>Identifiers</th> <th>Name</th> <th>Gender/DOB</th> <th>Address</th> <th>Rank</th> </tr> </thead> <tbody> <tr> <td>100000001</td> <td>DAVIDSON, Chamile</td> <td>F 1992-01-01</td> <td>12/687 Bakersfield Parade, EPPING NSW 2121 500</td> <td></td> </tr> </tbody> </table>	Identifiers	Name	Gender/DOB	Address	Rank	100000001	DAVIDSON, Chamile	F 1992-01-01	12/687 Bakersfield Parade, EPPING NSW 2121 500													
Identifiers	Name	Gender/DOB	Address	Rank																				
100000001	DAVIDSON, Chamile	F 1992-01-01	12/687 Bakersfield Parade, EPPING NSW 2121 500																					

Search for patient in HSACCESS and display the Patient Summary Report	UCR	<p>In the UCR instance, switch to HSACCESS namespace and go to:</p> <p>Portal > HealthShare > Registry Management > Classic Patient Search, search for patient and then click on patient name to display the Patient Summary Report.</p> <p>Ensure clinical data such as allergies, medications, encounters, lab results are displayed.</p>
---	-----	--

11. Configure TrakCare Personal Community Enrolment

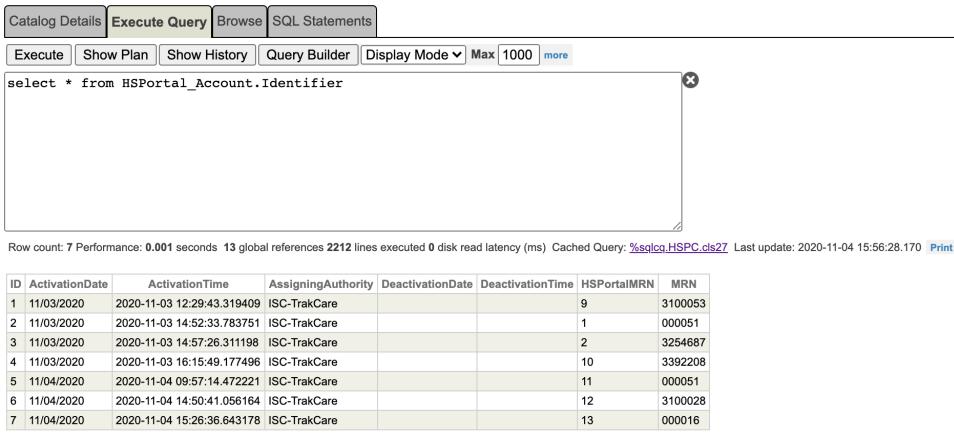
Steps	Application	Instructions
11.1. Add Personal Community fields to layout	TC	<p>Add Personal Community fields to Registration Details screen (PAPerson.Edit).</p>

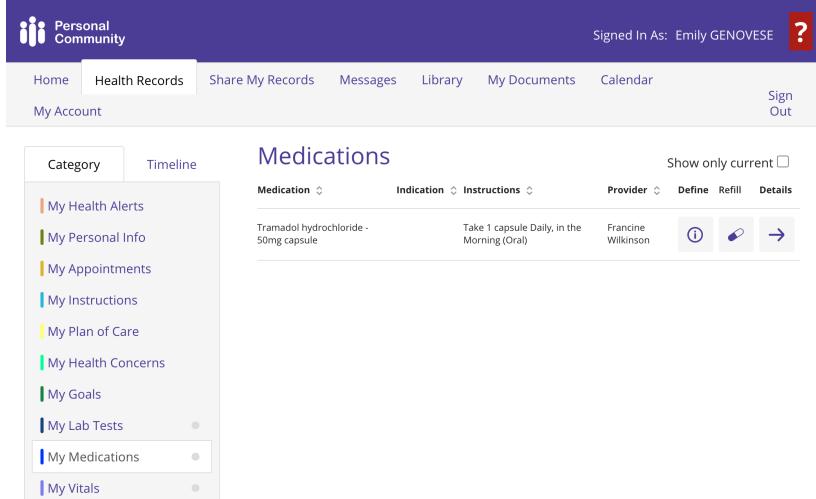
11.2. Enable PC in TrakCare Code Tables	TC	<p>Configure Personal Community in TrakCare code tables.</p> <ul style="list-style-type: none"> Setup Community Link settings in System Code Tables to enable direct link between TrakCare and Personal Community <p>Code Tables System Parameters Personal Community Management</p>  <p>CFHSCommunity.Edit 0.002913 (secs), 8949 (lines), 428 (globals)</p> <ul style="list-style-type: none"> Check Access Profile parameter "Allowed to Manage Patient PC Enrolment" for who can enrol patients. 
--	----	---

11.3. Configure PC Enrolment	PC	<p>In the Workbench, configure Passphrase</p> <ul style="list-style-type: none"> Allow the use of passphrase enrolment: Check Automatically notify member upon passphrase enrolment: Check Required enrolment fields: Passphrase 
11.4. Add test email	PC	<p>Add cc email to HSPortal_EmailOperation</p> <p>In HSPortal_EmailOperation, add email to cc in Production for testing purposes.</p> 
11.5. Add user to HSPortal_APIEnrollmentService	PC	<p>In HSPortal_APIEnrollmentService, set DefaultEnrollingUser with IRIS user, e.g. HS_Services</p> 

12. Checkpoint - After Configure PC Enrolment

Ensure each checkpoint is completed before moving to the next step.

Check	Application	Notes																																																																
12.1. Enrol patient in TrakCare	TC	Select a patient in TrakCare and update patient demographics. Ensure the patient has an email address.																																																																
12.2. Verify PIX Notifications	PC	<p>After enrolment, ensure the PIX notifications are being inserted PC, which is verified by running the following query in the PC namespace:</p> <p>Run SQL in HSPC namespace to see all patients</p> <pre>SELECT * FROM HSPortal_Account.Identifier</pre>  <table border="1"> <thead> <tr> <th>ID</th><th>ActivationDate</th><th>ActivationTime</th><th>AssigningAuthority</th><th>DeactivationDate</th><th>DeactivationTime</th><th>HSPortalMRN</th><th>MRN</th></tr> </thead> <tbody> <tr> <td>1</td><td>11/03/2020</td><td>2020-11-03 12:29:43.319409</td><td>ISC-TrakCare</td><td></td><td></td><td>9</td><td>3100053</td></tr> <tr> <td>2</td><td>11/03/2020</td><td>2020-11-03 14:52:33.783751</td><td>ISC-TrakCare</td><td></td><td></td><td>1</td><td>000051</td></tr> <tr> <td>3</td><td>11/03/2020</td><td>2020-11-03 14:57:26.311198</td><td>ISC-TrakCare</td><td></td><td></td><td>2</td><td>3254887</td></tr> <tr> <td>4</td><td>11/03/2020</td><td>2020-11-03 16:15:49.177496</td><td>ISC-TrakCare</td><td></td><td></td><td>10</td><td>3392208</td></tr> <tr> <td>5</td><td>11/04/2020</td><td>2020-11-04 09:57:14.472221</td><td>ISC-TrakCare</td><td></td><td></td><td>11</td><td>000051</td></tr> <tr> <td>6</td><td>11/04/2020</td><td>2020-11-04 14:50:41.056164</td><td>ISC-TrakCare</td><td></td><td></td><td>12</td><td>3100028</td></tr> <tr> <td>7</td><td>11/04/2020</td><td>2020-11-04 15:26:36.643178</td><td>ISC-TrakCare</td><td></td><td></td><td>13</td><td>000016</td></tr> </tbody> </table> <p>7 row(s) affected</p> <p>Run SQL in HSREGISTRY namespace to compare patients:</p> <pre>SELECT * FROM HS_Registry.Patient</pre>	ID	ActivationDate	ActivationTime	AssigningAuthority	DeactivationDate	DeactivationTime	HSPortalMRN	MRN	1	11/03/2020	2020-11-03 12:29:43.319409	ISC-TrakCare			9	3100053	2	11/03/2020	2020-11-03 14:52:33.783751	ISC-TrakCare			1	000051	3	11/03/2020	2020-11-03 14:57:26.311198	ISC-TrakCare			2	3254887	4	11/03/2020	2020-11-03 16:15:49.177496	ISC-TrakCare			10	3392208	5	11/04/2020	2020-11-04 09:57:14.472221	ISC-TrakCare			11	000051	6	11/04/2020	2020-11-04 14:50:41.056164	ISC-TrakCare			12	3100028	7	11/04/2020	2020-11-04 15:26:36.643178	ISC-TrakCare			13	000016
ID	ActivationDate	ActivationTime	AssigningAuthority	DeactivationDate	DeactivationTime	HSPortalMRN	MRN																																																											
1	11/03/2020	2020-11-03 12:29:43.319409	ISC-TrakCare			9	3100053																																																											
2	11/03/2020	2020-11-03 14:52:33.783751	ISC-TrakCare			1	000051																																																											
3	11/03/2020	2020-11-03 14:57:26.311198	ISC-TrakCare			2	3254887																																																											
4	11/03/2020	2020-11-03 16:15:49.177496	ISC-TrakCare			10	3392208																																																											
5	11/04/2020	2020-11-04 09:57:14.472221	ISC-TrakCare			11	000051																																																											
6	11/04/2020	2020-11-04 14:50:41.056164	ISC-TrakCare			12	3100028																																																											
7	11/04/2020	2020-11-04 15:26:36.643178	ISC-TrakCare			13	000016																																																											
12.3. Activate Account in Personal Community	PC	Activate the PC account by using the access code and phase phrase details in the email.																																																																

12.4. View Health Record	PC	<p>Log in to Personal Community and click on Health Records and Category to see clinical data.</p> 
12.5. View Integration History	TC	<p>Log in to TrakCare > Tools > Integration > Integration History, and see if there are any errors or warnings.</p>

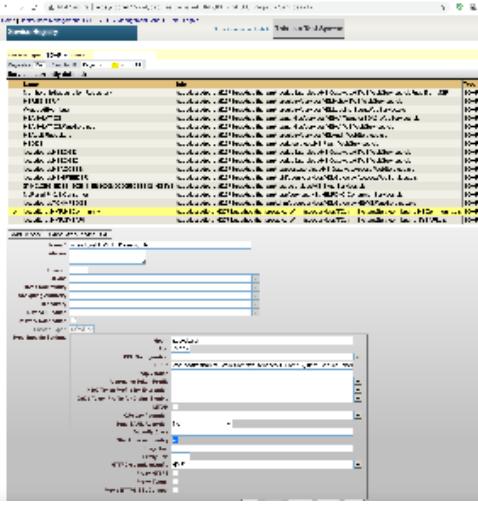
13. Maintenance

Steps	Application	Instructions
13.1. Schedule Task to Purge Outdated Message Data	PC	<p>By default, all messages for your Personal Community production are retained. Over time, the volume of data can increase to a point where event log and Message Viewer performance suffer. Follow these instructions to setup a purge task:</p> <p>Scheduling a Task to Purge Outdated Message Data</p>
13.2. Test Backup Restore	UCR/PC	<p>Test backup and restore</p>

14. Configure Personal Community for TrakCare

These steps follow the Personal Community [TrakCare Integration Package Releases](#) documentation. Only install the functionality required for your environment.

Steps	Application	Instructions
14.1. Install Integration Package	PC	<p>Follow Installing the Integration Package to install the Personal Community TrakCare module.</p>
14.2. Configuring the REST Handler	PC	<p>Follow Configuring the REST Handler to create new web application /public/api/v1/trakcare.</p>

14.3. Send Account Status Change Notifications to TrakCare	PC/UCR	<p>Follow these steps to Send Account Status Change Notifications to TrakCare.</p> <p>Includes creating Service Registry entry:</p> <ul style="list-style-type: none"> • Name: iscsydtcref:HMF:HSCommunity • Host: iscsydtcref • Port: 52773 • URL: /csp/healthshare/auxx-ref-hmfsys/services/TC.hmf.System.Service.Inbound.HSCommunity.cls • Send SAML Assertion: No • Check Server Identity: Check • HTTPCredentialsConfig: HMF 
14.4. Accepting Documents Uploaded by Members	PC	Follow these steps to Accept Documents Uploaded by Members .
14.5. Online Forms and Questionnaires	PC	Follow this guide Online Forms and Questionnaires to allow patients to complete a form within Personal Community and have a PDF rendering of the response become part of the Patients Documents section in their medical record
14.6. Appointment Scheduling	PC	Follow this guide Appointment Scheduling to allow patients to directly book, rebook and cancel TrakCare appointments within Personal Community.

Demonstration Preparation

15. Configuring Personal Community

These steps were performed using the reference document [Configuring HealthShare Personal Community](#)

Steps	Application	Instructions
15.1. Modify Event Calendar	PC	<p>Add/remove dates to the Event Calendar so the dates are relevant to the region.</p> <p>Follow these steps Configuring Personal Community Calendar</p>
15.2. Modify Feature Controls	PC	<p>Go to Personal Community Workbench > Setup > Site Configuration > Feature Controls</p> <ul style="list-style-type: none"> • Check Disable message appointment - removes Request Appointment from Common Tasks • Uncheck Disable billing activity - display My Bills tab

15.3. Online Forms and Questionnaires	PC	<p>Follow these steps to display online form in Personal Community</p> <ol style="list-style-type: none"> 1. Create online form using the form builder: Form Definition Notation Reference For HealthShare Personal Community 2. Upload and publish form: Uploading and Publishing Online Forms 3. Display form in PC: Displaying Online Forms in Personal Community <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Tip</p> <ul style="list-style-type: none"> • Start with the Online Form samples in /trak/pc/iris/hscommunity-content/hspc/public/base/samples • When publishing Online Forms for forms to be routed to TrakCare, choose Mode = Custom. </div> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> </div>
--	----	--

16. Customising Personal Community

These steps were performed using the reference document [Customizing the HealthShare Personal Community User Interface](#).



Tip

After any change to static content, Refresh Content before compiling and deploying the application.

Remember to clear browser cache after deploying application.

If making it many changes, then change the /public web application Serve Files = Always to ensure files are always served and not cached.

Steps	Application	Instructions
16.1. Modify the Public Application Structure and Behaviour	PC	<p>Follow Modifying the Public Application Structure and Behaviour steps to modify categories displayed in the My Summary Page and in the My Updates Box.</p> <p>To specify which categories appear in the Summary timeline and in the Your Updates box, use the two JSON files:</p> <ul style="list-style-type: none"> ui-categories-summary.json - Modifies what appears on the Summary page. ui-categories-update.json - Modifies what displays in the Your Updates box upon log in. <p>If not already done, copy these files from:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/base/config/settings/ui-categories-summary.json /trak/pc/iris/hscommunity-content/hspc/public/base/config/settings/ui-categories-update.json</pre> <p>to</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/custom/config/settings/ui-categories-summary.json /trak/pc/iris/hscommunity-content/hspc/public/custom/config/settings/ui-categories-update.json</pre> <p>Remove categories are required.</p>

16.2. Modify Categories on the Health Records Tab	PC	<p>Follow steps in Modifying Categories on the Health Records Tab</p> <p>If not already done, copy app.config.js file from:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app /modules/app.config.js</pre> <p>to</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app /modules/app.config.js</pre> <p>Hide all Categories not required. e.g.</p> <pre>hiddenCategories : ['authenticated.healthRecords.DeviceObservations', 'authenticated.healthRecords.AdvanceDirectives', 'authenticated.healthRecords.Alerts', 'authenticated.healthRecords.CarePlans', 'authenticated.healthRecords.Contacts', 'authenticated.healthRecords.Documents', 'authenticated.healthRecords.Encounters', 'authenticated.healthRecords.FamilyHistories', 'authenticated.healthRecords.Goals', 'authenticated.healthRecords.Guarantors', 'authenticated.healthRecords.Guardians', 'authenticated.healthRecords.HealthConcerns', 'authenticated.healthRecords.IllnessHistories', 'authenticated.healthRecords.Immunizations', 'authenticated.healthRecords.Insurances', 'authenticated.healthRecords.Observations', 'authenticated.healthRecords.OtherOrders', 'authenticated.healthRecords.PhysicalExams', 'authenticated.healthRecords.Problems', 'authenticated.healthRecords.Procedures', 'authenticated.healthRecords.ProgramMemberships', 'authenticated.healthRecords.Providers', 'authenticated.healthRecords.Referrals', 'authenticated.healthRecords.SocialHistories'],</pre>
16.3. Rename My Documents tab to My Forms	PC	<p>Follow steps in Specifying the Title of a Tab</p> <p>Open file:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app /modules/myDocuments/hspcMyDocuments.module.js</pre> <p>Identify translationKey: 'ISC_DOCUMENTS_USER_TITLE',</p> <p>If not already done, copy en-us.json file from:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app/assets /i18n/en-us.json</pre> <p>to</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app /assets/i18n/en-us.json</pre> <p>Modify the value of the variable "ISC_DOCUMENTS_USER_TITLE" to "My Forms"</p>
16.4. Specifying the Title for the Public Application Browser Tab	PC	<p>Follow steps in Specifying the Title for the Public Application Browser Tab</p> <p>Open file:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app /assets/i18n/en-us.json</pre> <p>Modify the value of variable "HS_COMMUNITY_TITLE_VALUE" to "Your Patient Portal"</p>
16.5. Changing the Appearance of the Public Application	PC	<p>Follow steps in Specifying the Organization Name and the Name of the Public Application</p> <p>Open file:</p> <pre>/trak/pc/iris/hscommunity-content/hspc/public/custom/config/application /en/application-settings.json</pre> <pre>{ "\$\$\$APPLICATION": "TrakCare Patient Portal", "\$\$\$ORGANIZATION": "TrakCare Hospital H1" }</pre>

16.6. Updating the Logo and Other Images	PC	<p>Follow steps Updating the Public Application Logo and Other Images</p> <p>Update logos and other images as required, for example, see below commands</p> <pre># Create directory and copy html files, set permissions and ownerships cd /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/images/ mkdir home-page chmod 775 home-page chown -R irisusr:irisgrp home-page cd /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/images/home-page cp /tmp/new-logo.jpg . chmod 764 new-logo.jpg chown -R irisusr:irisgrp new-logo.jpg cd /trak/pc/iris/hscommunity-content/hspc/public/custom/content/en/ cp -p /trak/pc/iris/hscommunity-content/hspc/public/base/content/en/content-home-splash.html . cp -p /trak/pc/iris/hscommunity-content/hspc/public/base/content/en/content-home-welcome.html . # Modify html as required nano /trak/pc/iris/hscommunity-content/hspc/public/base/content/en/content-home-splash.html nano /trak/pc/iris/hscommunity-content/hspc/public/base/content/en/content-home-welcome.html # Refresh content, compile and deploy</pre>
16.7. Customizing the Theme across the Public Application	PC	<p>Follow steps Customizing the Theme across the Public Application</p> <pre># Copy files to custom directories cp -p /trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app/assets/sass/hspc/_hspc-variables.scss /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/sass/hspc/ nano /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/sass/hspc/_hspc-variables.scss cp -p /trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app/assets/sass/_settings.scss /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/sass nano /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/assets/sass/_settings.scss</pre>
16.8. Modifying the Common Tasks List	PC	<p>Follow steps in Modifying the Common Tasks List</p> <p>Remove the following Common Tasks:</p> <ul style="list-style-type: none"> Ask Medical Question Share My Records <p>Add Online Forms to Common Tasks:</p> <ul style="list-style-type: none"> Modify /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/modules/app.config.js <pre>{ label: 'Online Forms', route: 'unauthenticated.library.questionnaires', icon : 'svg/isc-calendar.html' }</pre>
16.9. Removing a Tab	PC	<p>Follow steps in Removing a Tab for tabs you would like to remove, for example,</p> <p>Modify /trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/modules/app.config.js</p> <p>Specify the "*" line as:</p> <pre>'*' : ['!unauthenticated.clientTemplate.*', '!authenticated.shareRecords', '!authenticated.library.*'], // all members</pre> <p>Remove the following tabs:</p> <ul style="list-style-type: none"> Share My Records

16.10. Reordering Menu Items	PC	<p>Follow steps in Reordering Menu Items for menus you would like reorder. For example, reorder the menus in the Library tab:</p> <p>If not already done, copy hspcLibrary.module.js file from: <code>/trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app/modules/library/hspcLibrary.module.js</code></p> <p>to <code>/trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/modules/library/hspcLibrary.module.js</code></p> <p>Locate the secondLevelTabs or secondaryNav section and reorder/remove as appropriate.</p>
16.11. Modifying Page Content	PC	<p>How to change modify the medical emergency disclaimer phone number from 911 to 000?</p> <p>Updating Content</p> <p>If not already done, copy content-messages-disclaimer.html file from: <code>/trak/pc/iris/hscommunity-content/hspc/public/base/content/en/content-messages-disclaimer.html</code></p> <p>to <code>/trak/pc/iris/hscommunity-content/hspc/public/custom/content/en/content-messages-disclaimer.html</code></p> <p>Modify message as appropriate then refresh static content, compile and deploy.</p>
16.12. Modify Health Records Columns	PC	<p>To modify columns on the My Medications page, copy hspcMyMedications.model.js from: <code>/trak/pc/iris/hscommunity-content/hspc/public/base/ui-custom-app/modules/healthRecords/workflows/myMedications/hspcMyMedications.model.js</code></p> <p>to <code>/trak/pc/iris/hscommunity-content/hspc/public/custom/ui-custom-app/modules/healthRecords/workflows/myMedications/hspcMyMedications.model.js</code></p> <p>Then add the field you want to tableConfig (if you want both the top and details level) and detailsConfig (if you want just the details level).</p> <p>For example, see below code for how to add a date column to the My Medications table:</p> <pre>var tableConfig = { rowTemplate: 'app/templates/tableRow.html', title : 'ISC_WELLNESS_MEDICATIONS', columns : [{ key : 'Date', title: 'ISC_DATE' },] },</pre>
16.13. Set Linux permissions and Ownerships	PC	<p>On Linux systems, set permissions and ownerships for the custom folder:</p> <pre>sudo find /trak/pc/iris/hscommunity-content/hspc/public/custom -type d -exec chmod 775 {} \; sudo find /trak/pc/iris/hscommunity-content/hspc/public/custom -type f -exec chmod 764 {} \; sudo chown -R irisusr:irisgrp /trak/pc/iris/hscommunity-content/hspc/public/custom</pre>

17. Filtering SDA Data In Personal Community

Standard SDA filtering logic using custom code can be used to define what data to include in the SDA payload. See JIRA TC-252631 - Ability to filter SDA Clinical Summary payload for what gets included in each of the SDA segments.

Steps	Application	Instructions
-------	-------------	--------------

17.1. Create Custom Class	TC	Create custom class in TrakCare namespace, e.g. <pre>/// Custom class defined against Integration Manager - Profile SDA Segment Data (ProfileSegmentData) /// This class filters the items from the SDA. The class method is called with the ID of the record. Class Custom.THB1.hmf.Outbound.SegmentValidate Extends %RegisteredObject</pre>
17.2. Define Class in Integration Manager	TC	Open TrakCare > Integration Manager, save custom class name against Profile SDA Segment Data field.
17.3. Create Class Method for Segment	TC	The Class Method must be the segment name, e.g. "Allergy", "Alert", "SocialHistory", "Encounter", "Diagnosis", "Procedure", "Observation", "LabOrder", "RadOrder", "OtherOrder", "Order", "Medication", "Problem", "Appointment", "Vaccination", "Encounter", "Document", "IllnessHistory", "FamilyHistory", "Referral", "CarePlan", "Goal", "ClinicalRelationship"
17.4. Filter Active Allergies	TC	Filter active allergies example: <pre>/// Check for Allergy Active - return 1 when InActive is not equal to Yes. All other cases return 0. ClassMethod Allergy(ID) As %Boolean { quit:\$get(ID)="" 0 set flag=0 &SQL(SELECT ALG_InActive INTO :flag FROM SQLUser.PA_Allergy WHERE %ID=: ID) quit:(((\$get(SQLCODE)=0) && (\$get(flag)="Y")) 0 quit 1 }</pre>
17.5. Filter Discharged Medications	TC	Filter discharged medications example: <pre>/// Check for Discharged Medications - return 1 when Order Item Priority = DIS. All other cases return 0. ClassMethod Medication(ID) As %Boolean { quit:\$get(ID)="" 0 set priority="" &SQL(SELECT OEORI_Priority_DR->OECPR_Code INTO :priority FROM SQLUser. OE_OrdItem WHERE %ID=:ID) quit:(((\$get(SQLCODE)=0) && (\$get(priority)'="DIS")) 0 quit 1 }</pre>

18. How to reset a TrakCare Personal Community UCR environment?

Steps	Application	Instructions
18.1. Purge Personal Community	PC	Follow these steps to Reset Patient Data in Personal Community HSPC> Set status=##class(HSPortal.Utils).%ResetPatientData()
18.2. Reset UCR	UCR	Follow these steps to Reset Demo System HSLIB> do ##class(HS.Util.Installer).ResetAll()

18.3. Reset TrakCare Enrolment Status	TC	<p>TrakCare enrolment status is stored against the PA_Person table and the child table PA_PersonEnrollmentHistory.</p> <p>To reset the enrolment status of all patients in TrakCare:</p> <ol style="list-style-type: none">1. Purge all enrolment history from the child table. <code>DELETE from PA_PersonEnrollmentHistory</code>2. Set enrolment status to 'Not Enrolled' for all patients that have an existing status: <code>UPDATE PA_Person SET PAPER_HSCommunityEnrollmentStatus='NotEnrolled' WHERE PAPER_HSCommunityEnrollmentStatus is not null</code>
--	----	--