This checklist aims to support PHNs in supporting healthcare organisations get ready for using My Health Record. It contains hyperlinks for guidance and further information for each step.

### Helplines

<table>
<thead>
<tr>
<th>Service</th>
<th>Phone</th>
<th>For questions about:</th>
<th>Mon - Fri, 8am to 5pm (AEST)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Identifiers (HI) Service</td>
<td>1300 361 457</td>
<td>identifier queries and Organisation registration.</td>
<td>AEST &amp; AWST.</td>
</tr>
<tr>
<td>PRODA Help</td>
<td>1800 700 199</td>
<td>questions about PRODA.</td>
<td>8am to 5pm AWST.</td>
</tr>
<tr>
<td>HPOS Help</td>
<td>132 150</td>
<td>questions about HPOS.</td>
<td>8am to 5pm AWST.</td>
</tr>
<tr>
<td>eBusiness Service Centre</td>
<td>1800 700 199</td>
<td>certificates, including Medicare PKI Site Certificates and NASH.</td>
<td>8am to 5pm AEST &amp; AWST.</td>
</tr>
<tr>
<td>My Health Record Help Line</td>
<td>1800 723 471</td>
<td>Individuals and Healthcare providers support with My Health Record enquiries.</td>
<td>24/7.</td>
</tr>
<tr>
<td>Australian Digital Health Agency Help Centre</td>
<td>1300 901 001</td>
<td>complex queries, vendor enquiries, secure messaging delivery enquiries, and digital health education.</td>
<td>8am-5pm (AEST)</td>
</tr>
</tbody>
</table>

### My Health Record Awareness:

- What is the My Health Record system and what are the benefits
  - My Health Record [website](#), [benefits for providers](#), [YouTube case studies](#), [Webinars](#). View information on [uploading](#), [viewing](#) and organisation [registration](#) for My Health Record.

- Online education about PRODA and HPOS.
  - Provider Digital Access (PRODA) provides secure access to online government services. Access [online PRODA education](#).
  - Health Professional Online Services (HPOS) is a fast and secure way for health professionals and administrators to do business with us. Access [online HPOS education](#).

### Information Required to Register an Organisation for My Health Record

<table>
<thead>
<tr>
<th>Business ABN/ACN:</th>
<th>Responsible Officer (RO):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trading Name:</td>
<td>Organisation Maintenance Officer/s:</td>
</tr>
<tr>
<td>Street Address:</td>
<td>Mobile Phone (to receive SMS):</td>
</tr>
<tr>
<td>Postal Address:</td>
<td>Organisation Type:</td>
</tr>
</tbody>
</table>

**Important Numbers in the Preparation Process:**

- Healthcare Provider Identifier for Organisations (HPI-O): The HPI-O is generated when the Organisation My Health Record registration has occurred.

- Healthcare Provider Identifier – Individual (HPI-I): If registered with AHPRA, clinical staff can contact AHPRA for their HPI-I (t: 1300 419 495). Non-AHPRA health professionals can apply for a HPI-I by submitting the form HW033. HPI-Is can also be [searched via PRODA-HPOS](#).

- Individual Registration Authority (RA): May be required to identify individual management staff in the organisation that do not have an HPI-I. Obtained either from an existing Individual Medicare PKI certificate or under Profile in PRODA.
### Responsible Officer (RO) and Organisation Maintenance Officer (OMO):

<table>
<thead>
<tr>
<th>Organisation identifies a RO &amp; OMO</th>
<th>Understand My Health Record <a href="#">roles and responsibilities</a> including RO and OMO.</th>
</tr>
</thead>
</table>
| OMO and/or RO registers for a PRODA account. | 1. RO creates or signs into a [PRODA account](#).  
2. If a change in RO has taken place, [submit application to replace the RO](#) for an organisation with an existing HPI-O. |
| 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 PRODA-HPOS. OMOs can be [added, removed or changed via PRODA-HPOS](#) as required. |

### Registering the Organisation via PRODA-HPOS

| Register Seed Organisation for My Health Record via PRODA-HPOS | My Health Record registration step by step guides are on the [My Health Record website](#) and the [HPOS website](#). The RO logs into PRODA-HPOS to complete registration request.  
Follow [these steps if you have had a change of ownership](#). For further advice based on your circumstances, contact the HI Service on 1300 361 457. |
|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| RO or OMO signs into their PRODA-HPOS Mail | 1. RO logs into PRODA-HPOS & checks their HPOS mailbox.  
2. Email will contain HPI-O, details of the RO and OMO and how to apply for a [NASH PKI Organisation Certificate](#) for using conformant software to access My Health Record. |
| Applying for a NASH PKI Certificate for using conformant software to access My Health Record. | RO or OMO logs into PRODA-HPOS and requests a NASH.  
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.  
Once downloaded, the name of the NASH file is ‘Site’, which can be renamed ‘NASH’ once downloaded and the NASH PKI can be reused until it expires.  
If NASH PKI has expired or cannot be accessed, request a new NASH and indicate to revoke the previous NASH Certificate. |
| Linking existing PKI Certificate | RO or OMO logs into PRODA-HPOS and links existing Medicare PKI Certificate.  
If your organisation does not have a current Medicare PKI Site Certificate but will be using conformant software, request a PKI Certificate via PRODA-HPOS. |
| Linking HPI-Is to HPI-O in PRODA-HPOS is required for National Provider Portal, and Simple Aquarius. | For those organisations using the National Provider Portal or Simple Aquarius, the RO and/or OMO is required to link all HPI-Is to the HPI-O by managing HPI-I Authorisation Links. |
| If using software using a Contracted Services Provider (CSP) (e.g. Aquarius, MMEx) then link HPI-O to CSP Number. | [RO/OMO links HPI-O to CSP number](#), which is provided by the CSP software vendor, in both the CSP Links tab and added under Manage Authorisation Links in HPOS. |
| Is your software My Health Record Conformant? If not, you can use the National Provider Portal. | Follow these [step by step instructions](#) to register the organisation and individuals for the Provider Portal. Click here to access the [Provider Portal online or via PRODA](#). |

### Software Configuration

| Check with the software vendor on whether a list of HPI-Is is required to be available for configuring the software. E.g. Most Pharmacy software does not require this. | The software vendor will support with configuring software. As part of this set up all HPI-Is of staff using My Health Record will be required to be entered into the software.  
For those organisations using the National Provider Portal or Simple Aquarius, the RO and/or OMO is required to link all HPI-Is to the HPI-O by managing HPI-I Authorisation Links. |
My Health Record Readiness Checklist

NASH and Site PKI Certificates to be configured into software.

Call your software vendor or IT Support to arrange configuration support.

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

1. Contact your software vendor or IT Support for configuration support
2. When staff leave, close their user accounts. If using Aquarius or the National Provider Portal, unlink HPI-I Is from the Organisation via PRODA-HPOS.

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

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

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

Contact your software vendor or IT Support for My Health Record configuration support. Staff will require relevant viewing/uploading permissions for My Health Record and Electronic Transfer of Prescriptions enabled.

Check if conformant software can access My Health Record

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

Policies and Education:

My Health Record Security Policy

It is a requirement that a My Health Record Security Policy be implemented as described in the My Health Records Rule 2016. Examples of My Health Record Policy templates are published by the RACGP and the Pharmaceutical Society of Australia (PSA).

Staff complete My Health Record training

1. Internal My Health Record training is provided to organisation staff.
2. Access the Australian Digital Health Agency online eLearning Modules.
3. On Demand Software Training simulators and demonstrations. Username is OnDemandTrainingUser and password TrainMe.
4. Access software Summary Sheets or request My Health Record manuals from the software vendor.
5. Request an Australian Digital Health Agency Educator presentation.

Inform & Support Patients:

Access information to support your patients

A range of information and brochures are available on the My Health Record website.

For the following providers, materials can also be ordered online at http://myhealthrecord.immij.com with the password myhealthrecord2018 and the following usernames:
- PHN - Username: MHRE_PHN
- GP - Username: MHRE_GP
- Pharmacy - Username: MHRE_Pharmacy
- Hospital - Username: MHRE_Hospital

Information has been added to your website and privacy policy.

Inform consumers that your healthcare organisation uses My Health Record.

Brochures and posters displayed within your organisation

Contact your local Primary Health Network (PHN) to request additional My Health Record resources and collateral.