Representing People, Places and Devices using NHS CFH Templates

Version: 1.0
Status: Approved

Author: Kevin Sprague
Intended audience:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
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<tbody>
<tr>
<td>NPIIT Vendors</td>
<td></td>
</tr>
<tr>
<td>NSAPs, LSPs, ESPs</td>
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<tr>
<td>Other systems developers</td>
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Amendment History:

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<td>0.1</td>
<td>10/07/2008</td>
<td>First Version for comment</td>
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<td>0.2</td>
<td>24/09/2008</td>
<td>Updated examples to illustrate both message formats</td>
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<td>0.3</td>
<td>11/03/2009</td>
<td>Added Non Clinical Author</td>
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<tr>
<td>0.4</td>
<td>15/02/2011</td>
<td>Added latest templates developed for HSCI domain</td>
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<td></td>
<td></td>
<td>Added universal templates</td>
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<td>0.5</td>
<td>28/02/2011</td>
<td>Updated following internal review</td>
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<td>Updated for GPSOC CCN</td>
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<td>18/08/2011</td>
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Anticipated Changes

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<th>Nature of Change</th>
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<tr>
<td>TBA</td>
<td>TBA</td>
<td>This document will be reviewed annually and / or after release of a MIM.</td>
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<td></td>
<td></td>
<td>New versions will also be issued when NHS CFH deems there is a need to provide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>further information to assist vendors with implementation of NHS CFH CDA</td>
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<tr>
<td></td>
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<td>domains.</td>
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Reviewers:

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<table>
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<tr>
<td>Ian Townend</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Danny Ruttle</td>
<td></td>
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</table>
Dave Barnet
Interoperability Messaging and Modelling team
Tim Tett

**Approvals:**
This document requires the following approvals:

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<tr>
<td>Richard Kavanagh</td>
<td></td>
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This document version is only valid at the time it is retrieved from controlled file store, after which a new approved version will replace it.
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**Related Documents:**
These documents have been referenced in this document and will provide additional information.

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<td>Representation in Electronic Patient Records of Allergic Reactions, Adverse Reactions, and Intolerance of Pharmaceutical Products</td>
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<th>Term</th>
<th>Acronym</th>
<th>Definition</th>
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<tbody>
<tr>
<td>CDA</td>
<td>HL7</td>
<td>Clinical Document Architecture, Release 2.0</td>
</tr>
<tr>
<td>MIM</td>
<td>Message</td>
<td>Implementation Manual</td>
</tr>
<tr>
<td>CRE</td>
<td>Care</td>
<td>Record Element – A categorisation of clinical data</td>
</tr>
<tr>
<td>x_domain</td>
<td></td>
<td>A HL7 term for a subset of a HL7 vocabulary code list</td>
</tr>
<tr>
<td>NHS CfH Templated domain</td>
<td></td>
<td>A CfH MIM domain which has HL7 RMIMs which utilise the CfH HL7 templates</td>
</tr>
<tr>
<td>CFH localisation</td>
<td></td>
<td>Attributes added to a HL7 class or datatype with are only used for CFH implementations and can be safely ignored by non CFH systems.</td>
</tr>
<tr>
<td>Balloted or Ballot</td>
<td></td>
<td>HL7 Clinical Document Architecture, Release 2.0&quot; (2006 Normative Edition),</td>
</tr>
<tr>
<td>SNOMED</td>
<td></td>
<td>(Systematized Nomenclature of Medicine), is a systematically organised computer processable collection of medical terminology</td>
</tr>
<tr>
<td>CMET</td>
<td></td>
<td>(Common Message Element Type), are intended to express a common, reusable pattern.</td>
</tr>
<tr>
<td>Template</td>
<td></td>
<td>A template is a RMIM which is used to constraint another model.</td>
</tr>
<tr>
<td>RMIM</td>
<td></td>
<td>(Refined message information model), is an HL7 model derived from the HL7 RIM</td>
</tr>
<tr>
<td>RIM</td>
<td></td>
<td>(Reference information model)</td>
</tr>
<tr>
<td>Schematron</td>
<td></td>
<td>The Schematron is an XML structure validation language for making assertions about the presence or absence of patterns in trees. It is a simple and powerful structural schema language</td>
</tr>
<tr>
<td>mif</td>
<td></td>
<td>A HL7 model in an XML format</td>
</tr>
<tr>
<td>Participation</td>
<td></td>
<td>The involvement of a role in an act</td>
</tr>
<tr>
<td>actRelationship</td>
<td></td>
<td>A relationship between two acts</td>
</tr>
<tr>
<td>Class clone</td>
<td></td>
<td>A class that is a clone of another class, derived from another class</td>
</tr>
<tr>
<td>Act</td>
<td></td>
<td>Something happened or may happen</td>
</tr>
<tr>
<td>Entity</td>
<td></td>
<td>A person, animal, organisation or thing</td>
</tr>
<tr>
<td>Role</td>
<td></td>
<td>A responsibility or part played by an entity</td>
</tr>
<tr>
<td>Transform (XSLT)</td>
<td></td>
<td>a language for transforming XML</td>
</tr>
<tr>
<td>HSCI</td>
<td>Health</td>
<td>and Social Care Integration – A MIM messaging domain</td>
</tr>
<tr>
<td>DI</td>
<td></td>
<td>Diagnostic Imaging – A MIM messaging</td>
</tr>
<tr>
<td>Domain</td>
<td>Definition</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>HL7</td>
<td>Heath Level Seven – A standard for clinical and administrative data.</td>
<td></td>
</tr>
<tr>
<td>PSIS</td>
<td>Personal Spine Information Service – is the central database that will contain clinical records for each NHS patient.</td>
<td></td>
</tr>
<tr>
<td>OID</td>
<td>Object identifier - is an identifier used to name an object</td>
<td></td>
</tr>
<tr>
<td>UUID</td>
<td>Universally Unique Identifier - is an identifier standard used in software construction</td>
<td></td>
</tr>
<tr>
<td>URL</td>
<td>Uniform Resource Locator - is a compact string of characters used to represent a resource available on the Internet</td>
<td></td>
</tr>
<tr>
<td>XML</td>
<td>Extensible Markup Language - is a general-purpose specification for creating custom markup languages</td>
<td></td>
</tr>
<tr>
<td>HTML</td>
<td>Hyper Text Markup Language - is the predominant markup language for web pages. It provides a means to describe the structure of text-based information in a document - by denoting certain text as links, headings, paragraphs, lists, and so on</td>
<td></td>
</tr>
<tr>
<td>PNG</td>
<td>Portable Network Graphics - is a bitmapped image format that employs lossless data compression</td>
<td></td>
</tr>
<tr>
<td>TRUD</td>
<td>Terminology Reference Data Update Distribution Service – A Method of distributing terminologies</td>
<td></td>
</tr>
<tr>
<td>NPfIT</td>
<td>National Programme for Information Technology</td>
<td></td>
</tr>
<tr>
<td>CFH</td>
<td>Connecting for Health</td>
<td></td>
</tr>
<tr>
<td>CAF</td>
<td>Common Assessment Framework - is a standardised approach to conducting an assessment</td>
<td></td>
</tr>
</tbody>
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1 Introduction

This document provides guidance for those suppliers implementing NHS CFH messaging domains where the NHS CFH templates are used to constrain the representation of people and / or places and / or devices.

For the majority of clinical information the person involved will be someone held within SDS and the templates for SDS people would be used, there are times however when this is not the case.

For example if the person who authored the information on another system which was not spine conformant and then this information was imported into a spine conformant system. When this sort of scenario occurs it would be usual for the person logged into the spine conformant system to become the author of that information. There may however be instances where the original author is required to be retained for a particular part of the clinical document for whatever reason. Another use case for non SDS people would be for things like procedures where the performer was not on SDS or the procedure was carried prior to SDS being used. A point worth noting is that the author of a NHS CFH CDA document (with the exception of HealthSpace documents) must always be someone from SDS.

Points to note about this document

- Where a HL7 RMIM / model or any other MIM artefact is shown this may not be the latest version of that artefact and the relevant version of the MIM should be consulted for the actual artefact version to implement.

- In some places in this document the version number of the template has been removed as there are multiple versions of some templates. Where this is the case the guidance applies to all versions of the template in use unless stated otherwise.

- Where the attributes of a class are fixed in the schema the attributes will not be documented within this document

- All XML examples are in the templated format

- Unless stated otherwise this document applies to CDA and Non CDA templated domains
The follow templates are currently used and are covered in this document

Note:
“COCT” - denotes a non CDA template
“POCD” - denotes a CDA compliant template that may be used in non CDA domains

<table>
<thead>
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<th>Template Name</th>
<th>Identifier (minus version number)</th>
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<td>COCD_TP145001UK</td>
</tr>
<tr>
<td>AuthorNonSDSWithOrgSDS</td>
<td>COCD_TP145003UK</td>
</tr>
<tr>
<td>NonClinicalAuthor</td>
<td>COCD_TP145028UK</td>
</tr>
<tr>
<td>EntitySDS</td>
<td>COCD_TP145004UK</td>
</tr>
<tr>
<td>EntityNonSDSWithOrgSDS</td>
<td>COCD_TP145005UK</td>
</tr>
<tr>
<td>EntityNonSDSWithOrgNonSDS</td>
<td>COCD_TP145006UK</td>
</tr>
<tr>
<td>RelatedEntity</td>
<td>COCD_TP145007UK</td>
</tr>
<tr>
<td>ServiceDeliveryLocationSDS</td>
<td>COCD_TP145008UK</td>
</tr>
<tr>
<td>AuthorDeviceSDS</td>
<td>COCD_TP145009UK</td>
</tr>
<tr>
<td>DeviceNonSDSWithOrgSDS</td>
<td>COCD_TP145010UK</td>
</tr>
<tr>
<td>NonNamedPersonWithOrgSDS</td>
<td>COCD_TP145012UK</td>
</tr>
<tr>
<td>NonNamedPersonWithOrgNonSDS</td>
<td>COCD_TP145013UK</td>
</tr>
<tr>
<td>IncidentalLocation</td>
<td>COCD_TP145014UK</td>
</tr>
<tr>
<td>RequesterEntity</td>
<td>COCD_TP145016UK</td>
</tr>
<tr>
<td>RecipientOrganization</td>
<td>COCD_TP145017UK</td>
</tr>
<tr>
<td>CustodianOrganization</td>
<td>COCD_TP145018UK</td>
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<tr>
<td>NonNamedPersonAuthorSDS</td>
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<tr>
<td>Patient</td>
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<td>RecipientEntitySDS</td>
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<td>EntitySDSwithRequiredRoleProfiled</td>
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<td>Accessor</td>
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<td>HealthCareFacility</td>
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<td>RecipientWorkgroupSDS</td>
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Representing People and Places using NHS CFH Templates

Version: 0.6
Status: Draft
27th June, 2011

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## 2 Reasons for Carrying SDS Data in the Instance.

People, places and devices are identified wherever possible using SDS. The SDS templates are used when all or some of the relevant information is available on SDS. All the SDS information is carried in the document or message for the following reasons:

- **To enable the documents to be rendered or processed without a large number of SDS lookups**

  For example if a system has to render 10 documents it may need to do 10 SDS lookups to get the required information. Documents can and very often will contain multiple SDS people and places and this may mean that to render or process a large document the actual number of lookups could be very high even into the hundreds. Caching of SDS data on the receiving system may speed up this to a large extent but still there can be a lot of processing required.

- **To enable safe and correct rendering of documents**

  When the document was constructed the author would have verified the information in the document. Over time organisations change name, people get married or change their name for other reasons. Substituting what the author verified with new data is therefore incorrect. This would also not allow digital signing if ever required in the future.

- **To ensure the documents can be rendered offline**
The inclusion of all SDS data also allows rendering offline i.e. when not connected to SDS.

### 3 Use of non unique codes for job roles

The code carried in some templates is CWE (extensible) using any local code from any coding system utilised by the sending system to indicate the person’s role. A default OID of 2.16.840.1.113883.2.1.3.2.4.17.196 is available for use when there is no OID available for use within the local system. These codes should not be used for machine processing as a value from one system may have a different meaning to an identical value from another system. The only useful attribute of the code element is the displayName which should be rendered to indicate the author’s role to the document reader.

**Example of non unique code job role codes using the default OID**

**System A**

```xml
<code code="017" codeSystem="2.16.840.1.113883.2.1.3.2.4.17.196" displayName="General Practitioner"/>
```

**System B**

```xml
<code code="017" codeSystem="2.16.840.1.113883.2.1.3.2.4.17.196" displayName="Practice Nurse"/>
```

### 4 Format of person name

The name attribute in the person classes within the templates will contain the persons name and although there is no defined standard format for this attribute the following guidance should be used as best practice.

Structured name is preferred to unstructured.

Structured name when rendered using the NHS CFH renderer is rendered in the following order “Prefix” “Given” “Family”

**Example of structured name**

```xml
<name>
  <family>Smith</family>
  <given>John</given>
  <prefix>Dr</prefix>
</name>
```

Will render as “Dr John Smith”

When unstructured name is used it should be constructed in a similar format to how structured name is rendered

**Example of unstructured name**

```xml
<name>Dr John Smith</name>
```
Will also render as “Dr John Smith”
This will allow easy and consistent rendering of peoples names.

5 Representing Authors

For the majority of clinical information the author will be someone who has their user details and organisation details held within SDS. There are times however when this is not the case.

The templates for author allow for when the person and organisation details are held on SDS, when the person details are not on SDS but the organisation details are and also for when neither the persons details or organisation details are on SDS.

5.1 Representing Authors Using the AuthorSDS Template

The AuthorSDS template is used when all the relevant information is available on SDS.

AuthorSDS Template

5.1.1 Class – AssignedAuthorSDS

This class carries information about the author’s role.
Id

The first instance of id is mandatory and carries the authors SDS User ID, the second instance is required shall carry the SDS User Role Profile ID when available on the sending system. They shall be carried as follows:

An SDS identifier that uniquely identifies the Person.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
- the extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.

An SDS identifier that uniquely identifies the role profile of the person

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
- the extension attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

When the role profile ID is not available on the sending system a null flavor of "UNK" must be used

code

The section on use of non unique code should be consulted for this attribute

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the person's job role code
- The codeSystem attribute shall contain the OID for the code system
- The displayName attribute shall carry the person's job role name

5.1.2 Class – Person

This class carries information about the person who is the author

name

The name attribute should contain the persons name and although there is no defined standard format for this attribute the guidance in section 4 should be used as best practice.

5.1.3 Class – Organization

This class carries SDS details of the organisation that scopes the author in their role usually this is the organisation the author is working for.
id

A valid SDS identifier that uniquely identifies the Organisation. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass "nhsSite".

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- the extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute.

The above note from the tabular view is used to indicate that whenever possible the more specific id should be used as it is far more useful to have the actual hospital than it is to have the trust due to the fact most trusts have more than one hospital (site). It is the site that the reader of the document is interested in.

To illustrate this we can use the NHS Trust in Leeds.

Leeds Teaching Hospitals NHS Trust has the following hospitals (sites)

- Chapel Allerton
- Leeds General Infirmary
- Leeds Dental Institute
- Seacroft
- St James’s
- Wharfdale

If the high level id for Leeds Teaching Hospitals NHS Trust is used it will not be very useful for example if someone wanted to contact the author of a document.

name

The name of the organisation.

This shall use the name associated with the code above which will be either
Representing People and Places using NHS CFH Templates

NACS site name (identified in the EIS by LDAP OID 2.5.4.10)

or

NACS organisation Code (identified in the EIS by LDAP OID 2.5.4.11)

It is important than the text carried is at the same level as the identifier carried in the organization.id.

5.2 Representing Authors Using AuthorNonSDS Templates

There are two author templates which allow for authors where some of the information carried does not come from SDS.

Note these templates cannot be used for the author of a CDA document but can be used for authors of CDA coded entries where the author is different to document author.

1. AuthorNonSDSWithOrgNonSDS
   a. The person is not on SDS and neither is the organisation they are working for.

2. AuthorNonSDSWithOrgSDS
   a. The person is not on SDS but the organisation they are working for is.

**Author Non SDS with organisation Non SDS template**

```xml
AuthorNonSDSWithOrgNonSDS

AssignedAuthor
classCode*: = ASSIGNED
id*: II [1..1]
code*: CV CWE [1..1] <= CDAJobRoleName
addr*: AD [1..1]

templateId*: II [1..1] = "COCD_TP145002UK03#AssignedAuthor"

Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]

Organization
classCode*: = ORG
determinerCode*: = INSTANCE
name*: ON [1..1]

templateId*: II [1..1] = "COCD_TP145002UK03#RepresentedOrganization"
addr: AD [0..1]

StandardIndustryClassCode*: CV CNE [1..1] <= CDAOrganizationType
```

**Author Non SDS with organisation SDS template**
5.2.1 Class – AssignedAuthor

This class carries information about the author’s role including contact details for the person when they are in the role.

### id

This attribute is not used in non SDS author templates as local identifiers would have no meaning to receiving systems. This attribute must be present, as a required attribute in the instance for CDA compliancy and therefore MUST be fixed to a null flavor of "NA".

Example xml

```xml
<id nullFlavor="NA"/>
```

### code

The section on use of non unique code should be consulted for this attribute

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The `code` attribute shall contain the person's job role code
- The `codeSystem` attribute shall contain the OID for the code system
- The `displayName` attribute shall carry the person's job role name

### add
The address attribute should carry an address associated with the person’s role. No datatype flavor is specified. As this attribute is required, a suitable null flavor must but included in the instance when no data is included.

**telecom**

A set of telephone addresses for person in the role specified in the role code carried in this class.

### 5.2.2 Class – Person

Person

| classCode*: = PSN | determinerCode*: = INSTANCE | name*: PN [1..1] | templateId*: II [1..1] = "COCD_TP145003UK03#assignedPerson"

This class contains details of the actual person who is the author.

**name**

The name attribute should contain the person’s name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

### 5.2.3 Class – OrganizationSDS

This class carries SDS details of the organisation that scopes the author in their role usually this is the organisation the author is working for.

OrganizationSDS

| classCode*: = ORG | determinerCode*: = INSTANCE | id*: II [1..1] | name*: ON [1..1] | templateId*: II [1..1] = "COCD_TP145003UK03#representedOrganizationSDS"

**id**

A valid SDS identifier that uniquely identifies the Organisation. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass “nhsSite”.

- The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- the *extension* attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types “nhsOrg” and “nhsGPPractice” (Organisations can be either of these)
The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1

the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute.

The above note from the tabular view is used to indicate that when ever possible the more specific id should be used as it is far more useful to have the actual hospital than it is to have the trust due to the fact most trusts have more than one hospital (site). It is the site that the reader of the document is interested in. To illustrate this we can use the NHS Trust in Leeds as an example.

Leeds Teaching Hospitals NHS Trust has the following hospitals (sites)

- Chapel Allerton
- Leeds General Infirmary
- Leeds Dental Institute
- Seacroft
- St James's
- Wharfdale

If the high level id (OID 2.16.840.1.113883.2.1.3.2.4.19.1) for Leeds Teaching Hospitals NHS Trust is used it will not be very useful where as the lower level codes (OID 2.16.840.1.113883.2.1.3.2.4.19.2.) will identify the actual site and are therefore much more useful.

name

The name of the organisation.

This shall use the name associated with the code above which will be either NACS site name (identified in the EIS by LDAP OID 2.5.4.10) or

NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

It is important than the text carried is at the same level as the identifier carried in the organization.id.

5.2.4 Class – Organization

This class carries details of the organisation that scopes the author in their role usually this is the organisation the author is working for.

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
name*: ON [1..1]
templateId*: II [1..1]
  = "COCD_TP145002UK03#representedOrganization"
addr: AD [0..1]
standardIndustryClassCode*: CV CNE [1..1] <= CDAOrganizationType
```
An optional address of the organisation. No datatype flavor is defined for this attribute.

name

The name of the organisation. No datatype flavor is defined for this attribute.

standardIndustryClassCode

The type of organisation must be specified using this code.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The `code` attribute shall contain a value from the list of codes in the vocabulary.
- The `codeSystem` attribute shall contain the OID for the vocabulary.
- The `displayName` attribute will carry a description for the code from the vocabulary.

When the type is not available or no suitable value is contained in the vocabulary then the code “999” - “Not specified” should be carried.

5.3 Representing Author Devices

This template is used to carry information from SDS about a system.

Author device SDS template.

![Diagram of AuthorDeviceSDS](image)

This template can be used as an author or may also be used with other participations. Its primary use is within the Telehealth domain where is it is used by reference using DeviceRoleRef COCD_TP148027UK template.

The referencing mechanism is documented [here](#).
5.3.1 Class – AssignedAuthorDeviceSDS

The system that is the author is identified using the system’s ASID. Where systems are hosted i.e. :- many systems on one ASID then identification of the individual end system is not possible using the information carried in the templated document. This information should however be available at local level for audit purposes.

**id**

An SDS identifier that uniquely identifies the Device. This is carried in the following way:

- The *root* attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.107
- the *extension* attribute shall contain the Accredited Application Instance Id held in the SDS directory as the Accredited System Identifier

5.3.2 Class – ParticipantRole

The device that is the author is identified by reference. See [here](#) for full details of this mechanism.

**ParticipantRole**

classCode*: = MANU
id*: II [1..1]
templateId*: II [1..1] = "COCD_TP145027UK02#ParticipantRole"
Id
This is a unique identifier for this instance of a device.
The Identifier Global datatype flavour is used to carry the identifiers follows:
- The root attribute shall contain a DCE UUID

5.3.3 Class - Entity
The Entity that scopes the device, this is the manufacturer that manufactured the device.

Entity
classCode*: <= EntityClass
determinerCode*: = INSTANCE
desc*: ST [1..1]
templateId*: II [1..1] = "COCD_TP145027UK02#manufacturerEntity"

desc
The name of the manufacturer.

5.3.4 Class - Device
This class contains details about the actual device

Device
classCode*: = DEV
determinerCode*: = INSTANCE
code*: CV CNE [1..1] <= DeviceTypeSnCT
templateId*: II [1..1] = "COCD_TP145027UK02#manufacturedDevice"
manufacturerModelName*: SC CWE [1..1] <= ManufacturerModelName
softwareName*: SC CWE [1..1] <= SoftwareName

code
Any code that describes a device type.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:
- The code attribute shall contain the device's SNOMED CT code
- The codeSystem attribute shall contain the OID for the code system
- The displayName attribute shall carry the device name

manufacturerModelName
The designated model name for a device, assigned by the manufacturer

softwareName
The version of the software running on the manufactured device.
5.4 Representing an Author without a Named Person

There are many cases where the authoring organisation details are available but not the authoring person details.

In HL7 terms an organisation is an inanimate object and therefore cannot author anything. Logically this is true and what is really meant is that this was authored by someone who works for the organisation but details of that person are either not available or not required to be messaged. The templates used here, for HL7 compliance usually have the person’s role as an empty class or with only basic details of the person’s role and the scoping organisation class.

One example of this is HealthSpace which is an automated system but classed as an organisation on SDS and therefore never has the person’s details available.

Non named person Author SDS template

```
5.4.1 Class – AssignedAuthorSDS
This class carries no data and the only unfixed attribute (id) is only for CDA schema compliancy

```

Id
This attribute is only present for CDA compliancy and MUST be fixed to a null flavor of "NA".

```
<id nullFlavor="NA"/>
```

5.4.2 Class – Organization
This class carries information about authoring organisation
id

A valid SDS identifier that uniquely identifies the Organisation. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass "nhsSite".

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- the extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types "nhsOrg" and "nhsGPP Practice" (Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute

name

This shall use the name associated with the code carried in the id attribute as detailed above which will be either

NACS site name (identified in the EIS by LDAP OID 2.5.4.10)

or

NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

5.5 Representing Non Clinical Authors

This template is used for authors who are not clinically qualified and not appear on SDS.
5.5.1 Class – NonClinicalAuthor

code

A code that describes a person's relationship type.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the person's relationship type
- The codeSystem attribute shall contain the OID for the code system
- The displayName attribute shall carry the person's relationship type description

addr

An address associated with the non clinical author.

telecom

A set of telecommunication addresses associated with this non clinical author.

5.5.2 Class – Person

name

The name of the non clinical author

6 Representing Custodian Organisations

The custodian template is used at clinical document level to represent the organisation with legal responsibility for the clinical document for example a hospital trust.

Custodian template
6.1 Class – AssignedCustodian

All the attributes of this class are fixed and therefore not documented here.

6.2 Class – CustodianOrganization

This class carries SDS information about the legally responsible organisation.

**id**

A valid SDS identifier that uniquely identifies the Organisation. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Organisations can be filtered in SDS by using the NACS code for the organisation which is the custodian of the document and the types “nhsOrg” and “nhsGPPractice” (Organisations can be either of these)

- The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the *extension* attribute shall contain the SDS NACS code

**name**
The name of the organisation.
This shall use the name associated with the code above which will be either
NACS site name (identified in the EIS by LDAP OID 2.5.4.10)
or
NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

7 Representing Organisations without a Named Person

There are many cases where the organisation details are available but not the
person details.
In HL7 terms an organisation is an inanimate object and therefore cannot do
anything. Logically this is true and what is really meant is this is the person details
are not available or not required the organisation to be messaged. The templates
used here, for HL7 compliant SDS template

Non named person with organisation SDS template

Non named person with Organisation non SDS template
7.1 Class – ParticipantRole

This class allows the non named persons role to be carried if required. Although the template is for an unnamed person in some case the type of role the person has is useful.

Code

The code in this template allows an optional role code to be carried because although the person’s details are not provided it is useful to know the type of role of the person if available on the sending system.

The section on use of non unique code should be consulted for this attribute.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the person’s job role code
- The codesystem attribute shall contain the OID for the code system
- The displayName attribute shall carry the person’s job role name

7.2 Class – OrganizationSDS

Due to the position within the CDA RMIM where this template is used the NACS code cannot not be carried in the code element of the organisation class. The information must be carried using the “id” attribute to carry the code and the name associated with the code carried in the “desc” attribute.
Desc
This shall use the name associated with the code above which will be either
NACS site name (identified in the EIS by LDAP OID 2.5.4.10)
or
NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

7.3 Class – Organization
Due to the position within the CDA RMIM where this template is used the name
element cannot be used. The information must be carried using the “desc” attribute to
carry the name of the organisation

```
<Organization
  classCode*: = ORG
determinerCode*: = INSTANCE
desc*: ST [1..1]
templateId*: II [1..1] =
  "COCD_TP145013UK03#scopingOrganization"
```

Desc
Carries the organisation name

8 Representing Recipients
All NHS CFH CDA documents have the recipients mandated. This means that the
document must have all the details of all the people or organisations that have been
sent a copy of the document carried within the document. This allows any recipient
to identify all the other recipients.

Note:- The recipient detail in the message is not detailed enough to resolve to an
ASID where a single user has access to more than one system with the same Role
Profile ID. The transmission wrapper is used for actual routing information and the
documentation on the use of infrastructure with CDA domains should be consulted
for further information.

It is important to know who has a copy of the document in the event that replacement
or nullification is required to allow all copies of the document to be replaced or
nullified.

There are two types of recipients Primary and trackers.

Primary
- There can be more than one primary
- Primary usually means that there is a action for the recipient
Tracker

- Also referred to as copies, copied to, CCs etc
- There can be more than one tracker
- Trackers are sent documents for information only (no action) implied

Further requirements for recipients will be detailed in the relevant business domain documentation when there are specific requires for the given domain.

8.1 Representing Recipient Persons

Most documents will be addressed to a person or persons within a given organisation. The recipient entity template is used for this purpose.

Recipient entity SDS template

8.1.1 Class – AssignedEntitySDS

This class carries identifiers of the person who is the recipient and their role.

id

The first instance of id shall carry the SDS User ID, the second instance shall carry the SDS User Role Profile ID. They shall be carried as follows:

An SDS identifier that uniquely identifies the Entity.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
• the extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.

An SDS identifier that uniquely identifies the role profile of the entity
• The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
• the extension attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

**Code**

The section on use of non unique code should be consulted for this attribute

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

• The *code* attribute shall contain the person's job role code
• The *codeSystem* attribute shall contain the OID for the code system
• The *displayName* attribute shall carry the person's job role name

### 8.1.2 Class – Person

This class contains information about the actual person who is the recipient

```plaintext
Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145021UK04#assignedPerson"
```

**name**

The name attribute should contain the persons name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

### 8.1.3 Class – Organization

This class carries information about the organisation the recipient works for or is associated with.

```plaintext
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1] = "COCD_TP145021UK04#representedOrganization"
```
**id**

A valid SDS identifier that uniquely identifies the Organisation. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass "nhsSite".

- The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- the *extension* attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the *extension* attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute.

The above note from the tabular view is used to indicate that when ever possible the more specific id should be used as it is far more useful to have the actual hospital than it is to have the trust due to the fact most trusts have more than one hospital (site). It is the site that the reader of the document is interested in. To illustrate this we can use the NHS Trust in Leeds as an example.

Leeds Teaching Hospitals NHS Trust has the following hospitals (sites)

- Chapel Allerton
- Leeds General Infirmary
- Leeds Dental Institute
- Seacroft
- St James’s
- Wharfdale

If the high level id (OID 2.16.840.1.113883.2.1.3.2.4.19.1) for Leeds Teaching Hospitals NHS Trust is used it will not be very useful where as the lower level codes (OID 2.16.840.1.113883.2.1.3.2.4.19.2.) will identify the actual site and are therefore much more useful.

**name**

The name of the organisation.

This shall use the name associated with the code above which will be either NACS site name (identified in the EIS by LDAP OID 2.5.4.10) or
NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

It is important that the text carried is at the same level as the identifier carried in the organization.id.

8.2 Representing Recipient Organisations

Senders should avoid sending to organisations instead of named intervals whenever possible because

- Routing and delivery is more complicated
- Replacement and nullification can be more complicated
- Requires a much more intelligent receiving system

However there are some specific use cases.

- When sending to PSIS which is classed as an organisation in SDS
- When sending to any other system classed as an organisation in SDS
- When sending to a GP practice or a small organisation

Recipient organization template

8.2.1 Class – IntendedRecipient

All the attributes of this class are fixed and therefore not documented.

8.2.2 Class – Organization

This class carries information about the recipient organisation.
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Status: Draft
27th June, 2011

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id
A valid SDS identifier that uniquely identifies the Organisation. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

- **Sites (including Branch surgeries)** can be filtered within SDS combining the NACS code for the location which is relevant to the recipient with the objectClass “nhsSite”.
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
  - the extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the recipient and the types “nhsOrg” and “nhsGPPractice” (Organisations can be either of these)
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
  - the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute.

The above note from the tabular view is used to indicate that the higher level code should be used only really be used for PSIS (which is always at the higher level) or when the lower level code is not available.

name
The name of the organisation.

This shall use the name associated with the code above which will be either NACS site name (identified in the EIS by LDAP OID 2.5.4.10)

or

NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

It is important that the text carried is at the same level as the identifier carried in the organisation.id

8.3 Representing Recipient Workgroups Using SDS

This template is used to represent workgroups who are recipients of documents or messages using SDS.
### 8.3.1 Class - RecipientWorkgroupSDS

**id**

An SDS identifier that identifies a workgroup.

- The *root* attribute shall be an OID with the value `1.2.826.0.1285.0.2.0.109`
- The *extension* attribute shall be the SDS workgroup code.

**recipientRoleCode**

Used to hold the workgroup name in the *displayName* attribute.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The *code* attribute shall contain the default value "01"
- The *codeSystem* attribute shall contain the OID "2.16.840.1.113883.2.1.3.2.4.17.266"
- The *displayName* attribute shall carry the workgroup SDS defined name

### 8.3.2 Class - Organization

**id**

A valid SDS identifier that uniquely identifies the Organization. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

- The *root* attribute shall contain an OID with the value `2.16.840.1.113883.2.1.3.2.4.19.1`
- The *extension* attribute shall contain the SDS Organisation code (ODS code)
9 Representing Contact Points

This section details how to represent points of contact for a business process and can be people or groups of people, the details carried are usually a common point of contact for a team.
9.1 Class - IndividualContact

id

The first instance of id is mandatory shall carry the SDS User ID, the second instance is required shall carry the SDS User Role Profile ID when available on the sending system. They shall be carried as follows:

An SDS identifier that uniquely identifies the Person.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
- the extension attribute shall contain the SDS User ID, known in the External Interface Specification as User’s Unique Identifier.

An SDS identifier that uniquely identifies the role profile of the person
The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
the extension attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

When the role profile ID is not available a null flavor of "UNK" must be used

telemcom
The contact details of the individual.

9.2 Class - WorkgroupContact

id
An SDS identifier that identifies a workgroup.

- The root attribute shall be an OID with the value 1.2.826.0.1285.0.2.0.109
- The extension attribute shall be the SDS workgroup code.

telemcom
The contact details of the workgroup.

recipientRoleCode

Used to hold the workgroup name in the displayName attribute.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the default value "01"
- The codeSystem attribute shall contain the OID "2.16.840.1.113883.2.1.3.2.4.17.266"
- The displayName attribute shall carry the workgroup SDS defined name

9.3 Class - IndividualContactSDS

id
The first instance of id is mandatory shall carry the SDS User ID, the second instance is required shall carry the SDS User Role Profile ID when available on the sending system. They shall be carried as follows:

An SDS identifier that uniquely identifies the Person.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
- the extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.
An SDS identifier that uniquely identifies the role profile of the person

- The *root* attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
- The *extension* attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

When the role profile ID is not available a null flavor of "UNK" must be used

**telecom**
The contact details of the individual.

### 9.4 Class - WorkgroupContactSDS

**id**
An SDS identifier that identifies a workgroup.

- The *root* attribute shall be an OID with the value 1.2.826.0.1285.0.2.0.109
- The *extension* attribute shall be the SDS workgroup code.

**telecom**
The contact details of the workgroup.

**recipientRoleCode**
Used to hold the workgroup name in the *displayName* attribute.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The *code* attribute shall contain the default value "01"
- The *codeSystem* attribute shall contain the OID "2.16.840.1.113883.2.1.3.2.4.17.266"
- The *displayName* attribute shall carry the workgroup SDS defined name

### 9.5 Class - Organization

**Id**
A valid SDS identifier that uniquely identifies the Organization. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass "nhsSite".
The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
the extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types "nhsOrg" and "nhsGPPractice"
(Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute

10 Representing Relatives, Carers and Other Involved People

There are cases where third parties details are contained in the patient’s record. These third parties are people such as Carers, family and relatives.

These are included in the documents for wide range of reasons depending on the domain the following is an example of the some possible reasons

- Recorded as informant of information relevant to the patients care
  - Mother said “child hit head on swing”
- Recorded as being present at a care event or assessment
  - Daughter present during her mothers assessment
- Recording as performer of something relevant to patient
  - Carer baths patients

The related entity template is used for all representations of people who are not Care Professionals but have some relationship with the patient.

Note that the term “related” is used to indicate that the person has a relationship to the patient not that the person is “related” to the patient in the “familial” sense.

Related entity template
10.1 Class – RelatedEntity

This class identifies the relationship of the person to the patient and contact details of the person in that role.

- **code**
  A code taken from the CDAPersonRelationshipType vocabulary which identifies the relationship between the person and the patient, for example mother or wife.

  The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:
  - The `code` attribute shall contain a value from the list of codes in the vocabulary
  - The `codeSystem` attribute shall contain the OID for the vocabulary
  - The `displayName` attribute will carry a description for the code from the vocabulary

- **addr**
  An address for the person who is the related person

- **telecom**
  A telecom address for the related person

10.2 Class – Person

This class carries information about the actual related person.
Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] =
"COCD_TP145007UK03#relationshipHolder"

**name**
The name attribute should contain the person's name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

### 11 Representing Locations

There are many types of wide-ranging locations associated with patient care and some examples below illustrate the types of locations and places that need to be covered by the various templates:

- a hospital ward
- Back of an ambulance
- GP Surgery
- accident site on a motorway
- ledge half way up a mountain
- railway station

The locations or places usually fall into 2 basic types:

- those when care is planned to take place such as hospitals
- those where care is not planned such as accident sites

The following templates are used to represent the different types of locations:

<table>
<thead>
<tr>
<th>Template</th>
<th>Identifier (minus version number)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServiceDeliveryLocationSDS</td>
<td>COCD_TP145008UK</td>
</tr>
<tr>
<td>ServiceDeliveryLocationDetails</td>
<td>COCD_TP145025UK</td>
</tr>
<tr>
<td>HealthCareFacility</td>
<td>COCD_TP145024UK</td>
</tr>
<tr>
<td>IncidentalLocation</td>
<td>COCD_TP145014UK</td>
</tr>
</tbody>
</table>

### 11.1 Representing Service Delivery Locations

There are two templates used to represent service delivery location:

ServiceDeliveryLocationSDS which uses SDS to identify the service delivery location

ServiceDeliveryLocationDetails which allows SDS and / or Non SDS information to
be used and also more detailed information to be provided. A service delivery location is the place where the service is delivered. Therefore this more detailed template allows for this extra non SDS information representation to cover a wider range of service delivery locations some of which will never be held on SDS such as patient’s home.

**Service delivery location SDS template**

![Diagram](image)

**Service delivery location details template**

![Diagram](image)

### 11.1.1 Class – ServiceDeliveryLocationSDS

This class identifies the service delivery locations SDS id and the type of service delivery location.

```
ServiceDeliveryLocationSDS
(classCode*: SDLOC
id*: II [1..1]
templateId*: II [1..1] = "COCD_TP145008UK03#ServiceDeliveryLocationSDS"
```

**id**

A valid SDS identifier that uniquely identifies the Organisation. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.
The SDS Service delivery location id attribute can be populated using the following SDS codes:

Departments can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.3
- The extension attribute shall contain the SDS NACS department code

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the encounter with the objectClass "nhsSite".

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- The extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- The extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute

11.1.2 Class – PlaceSDS

This class carries the name of the place as held in SDS.

```
PlaceSDS
classCode*: = PLC
determinerCode*: = INSTANCE
name*: TN [1..1]
templateId*: II [1..1] = "COCD_TP145008UK03#location"
```

**name**

The name of the place.

This shall use the name associated with the code above which will be either

NACS site name (identified in the EIS by LDAP OID 2.5.4.10)

or

NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

*It is important that the text carried is at the same level as the identifier carried in the organization.id*
11.1.3 Class – ServiceDeliveryLocation

This class identifies the service delivery locations id and the type of service delivery location using either SDS when available or an alternative method. The alternative method would be a local implementation and therefore is not documented in any detail here.

![ServiceDeliveryLocation class diagram]

**Id**

An identifier of the location.

If using SDS then this attribute will contain a valid SDS identifier that uniquely identifies the Organisation. The root attribute shall be the OID for the SDS code set and the extension shall contain the code. The SDS Service delivery location id attribute can be populated using the following SDS codes:

- **Departments** can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.3
  - the extension attribute shall contain the SDS NACS department code

- **Sites** (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant encounter with the objectClass "nhsSite".
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
  - the extension attribute shall contain the SDS NACS site code

- **Organisations** can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
  - the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute when using SDS.

When not using SDS because the service delivery location is not identifiable using SDS then this attribute can be populated using any non SDS identifier and OID. The OID used will be a local OID and is therefore NOT documented here.

**Code**
A SNOMED-CT code indicating the type of service delivery location (caresetting) where the event took place / will take place / is relevant / is associated with.

The Coded Plain Flavor of Code Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the stated fixed code
- The codeSystem attribute shall contain the OID for SNOMED-CT
- The displayName shall carry a description associated with the code in SNOMED-CT

### 11.1.4 Class – Organization

If this class is used at least one of the attributes MUST be populated with data.

```plaintext
Organization
  classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
desc*: ST [1..1]
templateId*: II [1..1]
  = "COCD_TP145025UK01#serviceProviderOrganization"
```

#### id

A valid SDS identifier that uniquely identifies the Organisation that scopes the location. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The Organisation id attribute can be populated using the following SDS codes:

- **Departments:** can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).
  - The root attribute shall contain an OID with the value
    2.16.840.1.113883.2.1.3.2.4.19.3
  - the extension attribute shall contain the SDS NACS department code

- **Sites (including Branch surgeries):** can be filtered within SDS combining the NACS code for the location which is relevant encounter with the objectClass "nhsSite".
  - The root attribute shall contain an OID with the value
    2.16.840.1.113883.2.1.3.2.4.19.2
  - the extension attribute shall contain the SDS NACS site code

- **Organisations:** can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice"

  (Organisations can be either of these)
  - The root attribute shall contain an OID with the value
    2.16.840.1.113883.2.1.3.2.4.19.1
  - the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute
A Null flavor maybe used when this attribute is not used due to the details organisation not being held on SDS.

**desc**
The desc attribute is used to carry the name and address of the organisation.

### 11.1.5 Class – Place

If this class used at least one of the attributes MUST be populated with data.

```
Place
classCode*: = PLC
determinerCode*: = INSTANCE
name*: TN [1..1]
desc*: ST [1..1]
templateId*: II [1..1] = "COCD_TP145025UK01#location"
```

**desc**
A description of the place
A Null flavor maybe used if required

**Name**
The name of the place.
A Null flavor maybe used if required.

### 11.2 The HealthCare Facility used by Encompassing Encounter

There is a special type of service delivery location template used with encompassing encounter which is called healthcare facility. This template can only be used within encompassing encounter and is used to constrain the location information associated with the encompassing encounter.

**HealthCare Facility template**
11.2.1 Class – HealthCareFacility

This class is used to carry an identifier for the HealthCare facility (service delivery location) and a code to indicate the type care setting.

**id**

A valid SDS identifier that uniquely identifies the HealthCare Facility. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The HealthCare Facility id attribute can be populated using the following SDS codes:

- Departments can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).
  - The *root* attribute shall contain an OID with the value `2.16.840.1.113883.2.1.3.2.4.19.3`
  - the *extension* attribute shall contain the SDS NACS department code
- Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant encounter with the objectClass "nhsSite".
  - The *root* attribute shall contain an OID with the value `2.16.840.1.113883.2.1.3.2.4.19.2`
  - the *extension* attribute shall contain the SDS NACS site code
- Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)
  - The *root* attribute shall contain an OID with the value `2.16.840.1.113883.2.1.3.2.4.19.1`
  - the *extension* attribute shall contain the SDS NACS code
Note these are listed in order preference for populating this attribute

A Null flavor may be used when required.

code

A SNOMED-CT code indicating the type of service delivery location (caresetting) where the Encompassing encounter took place or is associated with.

The Coded Plain Flavor of Code Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the stated fixed code
- The codeSystem attribute shall contain the OID for SNOMED-CT
- The displayName shall carry a description associated with the code in SNOMED-CT

### 11.2.2 Class - Organization

This is the organisation that scopes (is responsible for) the Health Care Facility. At least one of these attribute MUST be used when this class is used

![Organization](image)

id

A valid SDS identifier that uniquely identifies the Organisation that scopes the HealthCare Facility. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The Organisation id attribute can be populated using the following SDS codes:

- Departments can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.3
  - the extension attribute shall contain the SDS NACS department code
- Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant encounter with the objectClass "nhsSite".
  - The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
  - the extension attribute shall contain the SDS NACS site code
- Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice"
(Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute

A Null flavor may be used when required.

name
The name of the organisation.
A Null flavor may be used if required.

telecom
The telecom of the organisation.
A Null flavor may be used if required.

daddr
The address of the organisation.
A Null flavor maybe used if required.

11.2.3 Class – Place
Details of the actual place.

<table>
<thead>
<tr>
<th>Place</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode*: = PLC</td>
</tr>
<tr>
<td>determinerCode*: = INSTANCE</td>
</tr>
<tr>
<td>name*: TN [1..1] = &quot;COCD_TP145024UK01#location&quot;</td>
</tr>
<tr>
<td>addr*: AD [1..1]</td>
</tr>
</tbody>
</table>

daddr
The address of the place.
A Null flavor may be used if required.

dname
The name of the place.
A Null flavor may be used if required.

11.3 HealthCare Facility XML Examples

Simple example of usage of healthcare facility template to identify the care setting was a GP Practice (“templated” format)
Simple example of usage of healthcare facility template to identify the care setting was a GP Practice ("on the wire" format)

Example of usage of healthcare facility template to identify care setting type and actual individual ward and in which trust ("templated" format)

Example of usage of healthcare facility template to identify care setting type and actual individual ward and in which trust ("on the wire" format)
11.4 Representing other types of locations

There are other types of locations associated with patient which are not classified as service delivery locations. These include places known as “incidental locations” and include such places as the location of a traffic accident.

Note the definition of what is a service delivery location and what is an incidental does have some overlap as one is a subtype of the other but the way to differentiate between the two is as follows.

Service delivery location (SDLOC)

A service delivery location is a type of passive role in which, the player is a place at which services may be provided. (Planned) for example patient’s home

Incidental service delivery location (ISDLOC which is a subtype of SDLOC)

An incidental service delivery location is a type of service delivery location in which, the player is a place at which health care services are provided without prior designation for that purpose. (Unplanned) For example, Road traffic accident scene.

Incidental location template

```
<IncidentalLocation (COCD_TP145014UK03)
A location which is incidental such as site of an accident

(LocationRole

classCode*: = ISDLOC
code*: CV CNE [1..1] <= IncidentalLocationTypeSnCT
addr: AD [0..1]
telecom: TEL [0..1]
templateId*: II [1..1] = "COCD_TP145014UK03#LocationRole"

Place

classCode*: = PLC
determinerCode*: = INSTANCE
code: CS CNE [0..1] <= PlaceEntityType
ame*: TN [1..1]
desc*: ST [1..1]
templateId*: II [1..1] = "COCD_TP145014UK03#Location"
```
11.4.1 Class – LocationRole
This class identifies the type of place and may include an address and telecom details.

**LocationRole**

- **classCode**: ISDLOC
- **code**: CV CNE [1..1] <= IncidentalLocationTypeSnCT
- **addr**: AD [0..1]
- **telecom**: TEL [0..1]
- **templateId**: II [1..1] = "COCD_TP145014UK03#LocationRole"

**code**
A SNOMED-CT code taken from the subset IncidentalLocationTypeSnCT used to identify the type of place.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain a value from the list of codes in the vocabulary
- The codeSystem attribute shall contain the OID for the vocabulary
- The displayName attribute will carry a description for the code from the vocabulary.

**addr**
Address contact details that are specific to the location role being played.

**Telecom**
Telecommunication contact details that are specific to the location role being played.

11.4.2 Class – Place
If this class is used then at least one attribute MUST be populated with data.

**Place**

- **classCode**: PLC
- **determinerCode**: INSTANCE
- **code**: CS CNE [0..1] <= PlaceEntityType
- **name**: TN [1..1]
- **desc**: ST [1..1]
- **templateId**: II [1..1] = "COCD_TP145014UK03#location"

**code**
A code taken from the HL7 PlaceEntity type to identify the type of place

**desc**
A textual description of the place

**name**
The name of the place
12 Representing Non Author Devices

The term “Non Author device” is used for when it is a requirement to record the device used to obtain / record or otherwise used relevant to the information carried in the document or message. “Non Author device” includes medical devices such as a heart monitors and computer systems and software. Although these devices can be authors of clinical data in their own right NHS CFH has disallowed device authors for most clinical data carried within NHS CFH CDA documents and only allowed human authors. This means that when the device is carried in the message or document for most cases it is to indicate the device used by the care professional who is the author performer etc.

DeviceNonSDSWithOrgSDS

12.1 Class – ParticipantRole

This class is used to indicate the role of the device i.e. the type of device using a SNOMED-CT code.

code

A SNOMED-CT code taken from the subset DeviceTypeSnCT.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain a value from the list of codes in the vocabulary
- The codeSystem attribute shall contain the OID for the vocabulary
- The displayName attribute will carry a description for the code from the vocabulary.
12.2 Class – Device

This class is used to carry details of the device in as much detail as deemed relevant.

```text
Device
classCode*: = DEV
determinerCode*: = INSTANCE
templateId*: II [1..1] = "COCD_TP145010UK03#playingDevice"
manufacturerModelName: SC CWE [0..1] <= ManufacturerModelName
softwareName: SC CWE [0..1] <= SoftwareName
```

**softwareName**

A character string that optionally may have a code attached which describes the software for the device.

The text must always be present if a code is present. The code maybe a local code and is not defined in this documentation.

**manufacturerModelName**

A character string that optionally may have a code attached which describes the manufacturer Model for the device.

The text must always be present if a code is present. The code maybe a local code and is not defined in this documentation.

12.3 Class – OrganizationSDS

This class is used to indicate the organisation that scopes the device. This usually means the organisation that maintains or owns or is responsible for the device.

```text
OrganizationSDS
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
desc*: ST [1..1]
templateId*: II [1..1]
  = "COCD_TP145010UK03#scopingOrganizationSDS"
```

**id**

A valid SDS identifier that uniquely identifies the Organisation that scopes the location. The root attribute shall be the OID for the SDS code set and the extension shall contain the code.

The Organisation id attribute can be populated using the following SDS codes:

Departments can be filtered within SDS combining the Department Code for the location which is relevant to the encounter with the objectClass "nhsDept" (Note that the Department Code is a value generated internally on Spine, not a NACS code).

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.3
- the extension attribute shall contain the SDS NACS department code
Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant encounter with the objectClass "nhsSite".

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- The extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- The extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute
A Null flavor maybe used when this attribute is not used due to the details organisation not being held on SDS.

desc

The desc attribute is used to carry the name and address of the organisation.

### 13 Representing Other SDS Registered Users (Clinical and Administrative)

The following templates are used for representing all other SDS personnel not previously mentioned.

<table>
<thead>
<tr>
<th>Template</th>
<th>Identifier (minus version number)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EntitySDS</td>
<td>COCD_TP145004UK</td>
</tr>
<tr>
<td>EntitySDSwithRequiredRoleProfile</td>
<td>COCD_TP145022UK</td>
</tr>
</tbody>
</table>

These templates are used for clinical participations such as performers and responsible parties and also for administrative participants such as data enterers. The representation is the same regardless of the participation type.
12.1. Class – AssignedEntitySDS

These classes are used to carry the person’s SDS identifiers and the person’s job role. There are differences in the representation of the id and code attributes and both types of this class are shown below for comparison.
id

For Entity SDS template both the user id and role profile id are mandatory and therefore

The first instance of id shall carry the SDS User ID, the second instance shall carry the SDS User Role Profile ID. They shall be carried as follows:

An SDS identifier that uniquely identifies the Entity.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
- The extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.

An SDS identifier that uniquely identifies the role profile of the entity

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
- The extension attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

For Entity SDSWithRequiredRoleProfileId template the user id is mandatory and role profile id is required therefore

The first instance of id is mandatory and shall carry the SDS User ID, the second instance is required and shall carry the SDS User Role Profile ID if available on the sending system. When the role profile id is not known then a nullFlavor of "UNK" must be sent in the document to positively state that this is the case. The ids shall be carried as follows:

An SDS identifier that uniquely identifies the Entity.

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
- The extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.

An SDS identifier that uniquely identifies the role profile of the entity

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.67
- The extension attribute shall contain the SDS Role Profile ID, known in the External Interface Specification as Role Profile Code.

code

For Entity SDS the code is mandatory and for Entity SDS With Required RoleProfileId it is required and a null flavor maybe used.

The section on use of non unique code should be consulted for this attribute

Any code that describes a person's job role.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain the person's job role code
- The codeSystem attribute shall contain the OID for the code system
The *displayName* attribute shall carry the person’s job role name

### 12.2. Class – Person

This class contains information about the actual person.

```xml
<Person>
  classCode*: = PSN
  determinerCode*: = INSTANCE
  name*: PN [1..1]
  templateId*: II [1..1] = "COCD_TP145022UK02#assignedPerson"
</Person>
```

**name**

The name attribute should contain the person's name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

### 12.3. Class – Organization

This class carries information about the organisation the person works for or is associated with.

```xml
<Organization>
  classCode*: = ORG
  determinerCode*: = INSTANCE
  id*: II [1..1]
  name*: ON [1..1]
  templateId*: II [1..1] = "COCD_TP145022UK02#representedOrganization"
</Organization>
```

**id**

A valid SDS identifier that uniquely identifies the Organisation. The *root* attribute shall be the OID for the SDS code set and the *extension* shall contain the code.

The SDS organisation id attribute can be populated using the following SDS codes:

- Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the author with the objectClass "nhsSite".
  - The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
  - the *extension* attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the author and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The *root* attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the *extension* attribute shall contain the SDS NACS code
14 Representing Other NonSDS Users (Clinical and Administrative)

The following templates are used for representing all other Non SDS personnel not previously mentioned. The organisation they work for / are associated with may or may not be on SDS.

<table>
<thead>
<tr>
<th>Template name</th>
<th>Identifier (minus version number)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EntityNonSDSWithOrgSDS</td>
<td>COCD_TP145005UK</td>
</tr>
<tr>
<td>EntityNonSDSWithOrgNonSDS</td>
<td>COCD_TP145006UK</td>
</tr>
</tbody>
</table>

These templates are used for clinical participations such as performers and responsible parties and also for administrative participants such as data enterers. The representation is the same regardless of the participation type.

**Entity Non SDS with Organisation SDS**

**Entity Non SDS with Organisation Non SDS**
### 14.1 Class – ParticipantRole

A class that carries details of the person's role and contact details while in that role.

<table>
<thead>
<tr>
<th>ParticipantRole</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>classCode</strong>: = ASSIGNED</td>
</tr>
<tr>
<td><strong>id</strong>: II [1..1]</td>
</tr>
<tr>
<td><strong>code</strong>: CV CWE [1..1] &lt;= CDAJobRoleName</td>
</tr>
<tr>
<td><strong>addr</strong>: AD [1..1]</td>
</tr>
<tr>
<td><strong>telecom</strong>: SET&lt;TEL&gt; [0..1]</td>
</tr>
<tr>
<td><strong>templateId</strong>: II [1..1] = &quot;COCD_TP145005UK03#ParticipantRole&quot;</td>
</tr>
</tbody>
</table>

**id**
This attribute is only present for CDA compliance and MUST be fixed to a null flavor of "NA".

```
<id nullFlavor="NA"/>.
```

**code**
The section on use of non unique code should be consulted for this attribute.

Any code that describes a person's job role.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The **code** attribute shall contain the person's job role code
- The **codeSystem** attribute shall contain the OID for the code system
- The **displayName** attribute shall carry the person's job role name

**addr**
An address associated with the role.

**telecom**
A set of telecommunication addresses associated with the role.

### 14.2 Class – Person

This class is used to carry the person's name.
Representing People and Places using NHS CFH Templates

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Status: Draft
27th June, 2011

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Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145005UK03#assignedPerson"

name
The name attribute should contain the persons name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

14.3 Class – OrganisationSDS

This class carries details of the organisation from SDS.

OrganizationSDS
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
desc*: ST [1..1]
templateId*: II [1..1] = "COCD_TP145005UK03#representedOrganizationSDS"

Due to the position within the CDA RMIM where this template is used the NACS code cannot not be carried in the code element of the organisation class. The information must be carried using the “id” attribute to carry the code. The name associated with the code carried in the “id” attribute above cannot be carried in the “name” attribute but must be carried in the “desc” attribute.

The reason for this is that the organisation is a clone of the scoping entity for ParticipantRole as shown below.

Id
Due to the position within the CDA RMIM where this template is used the NACS code cannot not be carried in the code element of the organisation class. The information must be carried using the “id” attribute to carry the code.
The SDS organisation id attribute can be populated using the following SDS codes:

Sites (including Branch surgeries) can be filtered within SDS combining the NACS code for the location which is relevant to the encounter with the objectClass "nhsSite".

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.2
- the extension attribute shall contain the SDS NACS site code

Organisations can be filtered in SDS by using the NACS code for the location which is relevant to the encounter and the types "nhsOrg" and "nhsGPPractice" (Organisations can be either of these)

- The root attribute shall contain an OID with the value 2.16.840.1.113883.2.1.3.2.4.19.1
- the extension attribute shall contain the SDS NACS code

Note these are listed in order preference for populating this attribute

desc

The name associated with the code carried in the “id” attribute above cannot be carried in the “name” attribute but must be carried in the “desc” attribute.

This shall use the name associated with the code carried in the “id” attribute which will be either

NACS site name (identified in the EIS by LDAP OID 2.5.4.10) or

NACS organisation name (identified in the EIS by LDAP OID 2.5.4.11)

The name should be at the same level as the code carried in the id attribute

---

14.4 Class – Organisation

Due to the position within the CDA RMIM where this template is used the NACS code cannot not be carried in the code element of the organisation class. The information must be carried using the “id” attribute to carry the code. The name associated with the code carried in the “id” attribute above cannot be carried in the “name” attribute but must be carried in the “desc” attribute.

The reason for this is that the organisation is a clone of the scoping entity for ParticipantRole as shown below.
0..1 playingEntityChoice
0..1 scopingEntity
ParticipantRole
classCode*: <= ROL
id: SET<II> [0..*]
code: CE CWE [0..1] <= RoleCode
addr: SET<AD> [0..*]
telecom: SET<TEL> [0..*]

Entity
classCode*: <= ENT
determinerCode*: = INSTANCE
id: SET<II> [0..*]
code: CE CWE [0..1] <= EntityCode
desc: ED [0..1]

This class is used to carry a description of the organisation

Organization
classCode*: = ORG
determinerCode*: = INSTANCE
desc*: ST [1..1]
templateId*: II [1..1] = “COCD_TP145006UK03#representedOrganization”

desc
This attribute carries a description of the organisation including the name.

15 Representing Workgroups Using SDS

This section details the use of SDS to represent workgroup when there is not specify template for the participation type. For example there is a specific template for Recipient Workgroups and the relevant section should be consulted for those.
16 Representing Patient Information

Within the CDA documents very little patient information is carried as this information is obtained from PDS. There are currently two templates for patient information.

<table>
<thead>
<tr>
<th>Template name</th>
<th>Identifier (minus version number)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient</td>
<td>COCD_TP145020UK</td>
</tr>
<tr>
<td>PatientWithLanguage</td>
<td>COCD_TP145026UK</td>
</tr>
</tbody>
</table>

**Patient template**

**PatientWithLanguage template**

---

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16.1 Class - PatientRole

This class carries an id to identify the patient only NHS number is allowed to be used.

```
PatientRole
classCode*: = PAT
id*: II [1..1]
templateId*: II [1..1] = "COCD_TP145026UK02#PatientRole"
```

**id**
The NHS number that identifies the patient.

This information is carried using the Identifier External datatype flavor as follows:
- the root element shall contain the value of the Patient NHS Number OID = 2.16.840.1.113883.2.1.4.1
- the extension shall contain the 10 digit NHS number.

16.2 Class - Person

This class is only present to allow the use of LanguageCommunication class. All attributes are fixed and therefore not documented here.

```
Person
classCode*: = PSN
determinerCode*: = INSTANCE
templateId*: II [1..1] = "COCD_TP145026UK02#patientPerson"
```

16.3 Class – LanguageCommunication

This class carries the patient language and a value representing the method of expression of the language.

```
LanguageCommunication
(LanguageCommunication)
languageCode*: CS CNE [1..1] <= HumanLanguage
modeCode: CV CNE [0..1] <= LanguageAbilityMode
templateId*: II [1..1] = "COCD_TP145026UK02#languageCommunication"
```

**LanguageCode**
A code taken from the HumanLanguage vocabulary.

The Coded Only datatype shall be used to carry this information as follows:
- The code attribute shall contain a code from the relevant vocabulary.

**modeCode**
A code taken from the HL7 LanguageAbilityMode vocabulary.

The Coded Value datatype shall be used to carry this information as follows:
The code attribute shall contain a code from the relevant vocabulary.

The `codeSystem` attribute shall contain the OID for the vocabulary.

The `displayName` attribute shall carry a description associated with the code in the vocabulary.

Note the tabular view in the MIM (7.2.n) states that the `originalText` element can be used for referencing CDA text. There is no use case for this and it is not recommended this is done.

### 17 Representing Sealing Requestors

The requester entity template is used to constrain the requester of sealing related events (seal unseal etc).

**Requester Entity template**

```
RequesterEntity
(classCode*: = PRS
id*: II [1..1]
code*: CV CNE [1..1] <= RequesterRelationshipType
templateId*: II [1..1] = "COCD_TP145016UK03#RequesterEntity"
```

17.1 Class – RequesterEntity

This class identifies the person’s role and their relationship to the patient from a sealing requester perspective.

```
RequesterEntity
(classCode*: = PRS
id*: II [1..1]
code*: CV CNE [1..1] <= RequesterRelationshipType
templateId*: II [1..1] = "COCD_TP145016UK03#RequesterEntity"
```

**id**

An SDS identifier that uniquely identifies the person requesting sealing.

If the person has an SDS id (because they are a Care Professional) then

- The root attribute shall contain an OID with the value 1.2.826.0.1285.0.2.0.65
the extension attribute shall contain the SDS User ID, known in the External Interface Specification as User's Unique Identifier.

If the person is the patient then

This information is carried using the Identifier External datatype flavor as follows:

- the root element shall contain the value of the Patient NHS Number OID = 2.16.840.1.113883.2.1.4.1
- the extension shall contain the 10 digit NHS number

In all other cases this attribute MUST be fixed to a null flavor of "NA".

<id nullFlavor="NA"/>

code

A code from the RequesterRelationshipType vocabulary indicating the type of relationship between the requester and the patient.

The Coded Plain flavor of the Coded Value (CV) data type shall be used to carry this information as follows:

- The code attribute shall contain a value from the list of codes in the vocabulary
- The codeSystem attribute shall contain the OID for the vocabulary
- The displayName attribute will carry a description for the code from the vocabulary

17.2 Class – Person

This class carries the name of the person who is the requester.

Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145016UKG3#relationshipHolder"

name

The name attribute should contain the persons name and although there is no defined standard format for this attribute the guidance given in section 4 should be used as best practice.

18 Representing an Accessor

This template is use to constrain information about the person who has access to a patients record and is used only in sealing notifications.

The accessor template
18.1 Class – Accessor

**id**

An id for an accessor can be one of the following:

**An SDS Workgroup shall be identified as follows:**

- The root attribute shall contain an OID with the value `1.2.826.0.1285.0.2.0.109`
- the extension attribute shall contain the SDS Workgroup.

**A local identifier allocated by the source system.**

The Identifier External datatype flavor is used to carry the second identifier as follows:

- The root carries an OID for the local identifier scheme
- The extension carries a human-readable identifier from that scheme

When none of the above is applicable, then a null flavor of "NA" must be used.

```
<id nullFlavor="NA"/>
```

18.2 Class – Entity

The entity can be a team or a group who play the role of an accessor of information.
name
The name of the team or group that has access to the information.
19 Device role referencing mechanism

Some of the roles used in the NHS CFH messages appear multiple times in a message.

One such message is the Telehealth Personal Health Monitoring Report which has a device on every monitored reading. For example there will be details of the device that took a blood pressure. When a message has 100 readings of blood pressure it is a big overhead to include the details of the device 100 times as this greatly increases message size. The solution is to specify the device once and reference it for each blood pressure reading.

The following example shows the Device Role template which appears once in the instance and the Device Reference template which appears multiple times in the instance. The Device Role template ParticipantRole class id contains a UUID which is used in every Role Reference in the DeviceRoleRef class id to provide a pointer. This is illustrated below.
20 Introduction to Universal Role Templates

20.1 Background

NHS CFH CDA documents are a constrained version of the balloted HL7 CDA release (R2 2006). The balloted version of CDA is a generic specification which needs to be constrained in some way for any given implementation of CDA to be undertaken successfully. The constraining of the generic CDA specification for a specific implementation is what is commonly known as creating a profile of CDA.

NHS CFH has created many profiles of CDA which conform to the NHS CFH generic profile. Full details of this approach can be found in the latest version of “Technical Guidance for Templated CDA Domains” FileCM reference NPFIT-FNT-TO-DPM-0737. Most NHS CFH profiles require SDS and PDS connectivity; the universal templates were designed to remove that restriction.

Other changes to the profiles to support universalisation have also been implemented such as introduction of NonXMLBody, attachments and coded entry templates that use coding systems other than SNOMED CT. These other changes are detailed in the “Technical Guidance for Templated CDA Domains” FileCM reference NPFIT-FNT-TO-DPM-0737.

20.2 Approach to Universalisation

The intent of the universalisation approach is to create universal profiles which are not dependant on SPINE connected services.

The universal profiles for NHS CFH CDA documents have been developed using what is referred to as “universal templates”. These profiles will be referred to as “Universal profiles”. Initially the universal templates will be modified copies of the existing templates which were designed for Spine services, but with certain attributes less constrained and/or containing information that was previously looked up from a SPINE connected service. All universal templates have universal in the name to allow easy identification. Some pre-existing templates which did not make use of SDS ids (so in fact were universal already) have been renamed to include universal for consistency.

Note: Most universal templates use ‘GB’ as the realm identifier within their artefact ID replacing ‘UK’. This change has been implemented to all new NHS CFH messaging artefacts and should not be used to identify universal artefacts. For example either of the names and IDs below is valid:

SpecialPersonUniversal-COCD_TP145039UK01 could be an old template renamed to universal
SpecialPerson-COCD_TP145039GB01 could be new non universal template
20.3 Use of Local Identifiers

The universal templates allow the use of “local identifiers”. Local identifiers are only useful where the identifying system is understood by the receiving system. For this reason it is recommended that local identifiers are only used where there is a common understanding of the identifier system, for example within the same organisation or locality.

20.4 Mapping to SDS Templates

Below is a mapping between the universal templates and the existing SDS equivalents. Those in red have positional context, this means that there is a choice of allowable templates dependant on where in the CDA document the template is used. This choice is only relevant at the time of the message design and this choice will have been correctly implemented in the CDA profile on any universal domain message specification.

<table>
<thead>
<tr>
<th>SDS</th>
<th>Universal</th>
</tr>
</thead>
<tbody>
<tr>
<td>COCD_TP145001UK03-AuthorSDS</td>
<td>COCD_TP145200GB01-AuthorPersonUniversal</td>
</tr>
<tr>
<td>COCD_TP145002UK03-AuthorNonSDSWithOrgNonSDS</td>
<td>COCD_TP145200GB01-AuthorPersonUniversal</td>
</tr>
<tr>
<td>COCD_TP145003UK03-AuthorNonSDSWithOrgSDS</td>
<td>COCD_TP145200GB01-AuthorPersonUniversal</td>
</tr>
<tr>
<td>COCD_TP145004UK03-EntitySDS</td>
<td>COCD_TP145210GB01-PersonWithOrganizationUniversal OR COCD_TP145220GB01-PersonParticipantWithOrganizationUniversal</td>
</tr>
<tr>
<td>COCD_TP145005UK03-EntityNonSDSWithOrgSDS</td>
<td>COCD_TP145210GB01-PersonWithOrganizationUniversal OR COCD_TP145220GB01-PersonParticipantWithOrganizationUniversal</td>
</tr>
<tr>
<td>COCD_TP145006UK03-EntityNonSDSWithOrgNonSDS</td>
<td>COCD_TP145210GB01-PersonWithOrganizationUniversal OR COCD_TP145220GB01-PersonParticipantWithOrganizationUniversal</td>
</tr>
<tr>
<td>COCD_TP145007UK03-RelatedEntity</td>
<td>Use this or 04 version when available</td>
</tr>
<tr>
<td>COCD_TP145008UK03-ServiceDeliveryLocationSDS</td>
<td>COCD_TP145207GB01-ServiceDeliveryLocationUniversal</td>
</tr>
<tr>
<td>COCD_TP145009UK03-DeviceSDS</td>
<td>COCD_TP145207GB01-DeviceUniversal</td>
</tr>
<tr>
<td>COCD_TP145009UK04-DeviceDeviceSDS</td>
<td>COCD_TP145207GB01-DeviceUniversal</td>
</tr>
<tr>
<td>COCD_TP145010UK03-DeviceNonSDSWithOrgSDS</td>
<td>COCD_TP145207GB01-DeviceUniversal</td>
</tr>
<tr>
<td>COCD_TP145012UK03-NonNamedPersonWithOrgSDS</td>
<td>COCD_TP145210GB01-NonNamedPersonUniversal (renamed only)</td>
</tr>
<tr>
<td>COCD_TP145013UK03-NonNamedPersonWithOrgNonSDS</td>
<td>COCD_TP145210GB01-NonNamedPersonUniversal (renamed only)</td>
</tr>
<tr>
<td>COCD_TP145014UK03-IncidentalLocation</td>
<td>Use this</td>
</tr>
<tr>
<td>COCD_TP145016UK03-RequesterEntity</td>
<td>Use this</td>
</tr>
<tr>
<td>COCD_TP145017UK03-RecipientOrganization</td>
<td>COCD_TP145203GB02-RecipientOrganizationUniversal</td>
</tr>
<tr>
<td>COCD_TP145018UK03-CustodianOrganization</td>
<td>COCD_TP145203GB02-CustodianOrganizationUniversal</td>
</tr>
<tr>
<td>COCD_TP145019UK03-NonNamedPersonAuthorSDS</td>
<td>COCD_TP145208GB01-NonNamedPersonAuthorSDS</td>
</tr>
<tr>
<td>COCD_TP145020UK03-Patient</td>
<td>COCD_TP145201GB01-PatientUniversal</td>
</tr>
<tr>
<td>COCD_TP145021UK04-RecipientEntitySDS</td>
<td>COCD_TP145202GB01-RecipientPersonUniversal</td>
</tr>
<tr>
<td>COCD_TP145022UK02-DeviceSDSWithRequiredRoleProfile</td>
<td>COCD_TP145210GB01-DeviceSDSWithRequiredRoleProfile</td>
</tr>
<tr>
<td>COCD_TP145023UK01-Accessor</td>
<td>Use this</td>
</tr>
<tr>
<td>COCD_TP145024UK01-HealthCareFacility</td>
<td>COCD_TP145211GB01-HealthCareFacilityUniversal</td>
</tr>
<tr>
<td>COCD_TP145025UK01-ServiceDeliveryLocationDetails</td>
<td>COCD_TP145211GB01-ServiceDeliveryLocationDetails</td>
</tr>
<tr>
<td>COCD_TP145026UK02-PatientWithLanguage</td>
<td>COCD_TP145201GB01-PatientUniversal</td>
</tr>
<tr>
<td>COCD_TP145027UK02-DeviceRole</td>
<td>Use this</td>
</tr>
<tr>
<td>COCD_TP145028UK01-NonClinicalAuthor</td>
<td>Use this</td>
</tr>
<tr>
<td>COCT_TP14501UK01-ReplyToIndividualSDS</td>
<td>COCD_TP145210GB01-PersonWithOrganizationUniversal</td>
</tr>
<tr>
<td>COCT_TP14502UK01-ReplyToWorkgroupSDS</td>
<td>COCD_TP145212GB02-WorkgroupUniversal</td>
</tr>
</tbody>
</table>
20.5 Use of ODS Codes to Identify Organisations

All the universal templates that use an organisation class mandate the use of ODS (formally known as NACS) codes to identify the organisation. This is because ODS codes are a national standard and the code lists are readily available online.

21 The Universal Templates in Detail

This section details typical universal templates, as there can be more that one version of a template the actual specification being implemented must be consulted for any actual implementation.

21.1 AuthorPersonUniversal (COCD_TP145200GB)

<table>
<thead>
<tr>
<th>AuthorPersonUniversal (COCD_TP145200GB)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A universal template for an author person [DRAFT]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AssignedAuthor</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode*: = ASSIGNED</td>
</tr>
<tr>
<td>id*: SET&lt;II&gt; [1..*]</td>
</tr>
<tr>
<td>code*: CV CWE [1..1] &lt;= JobRoleName</td>
</tr>
<tr>
<td>addr: SET&lt;AD&gt; [0..*]</td>
</tr>
<tr>
<td>telecom: SET&lt;TEL&gt; [0..*]</td>
</tr>
<tr>
<td>templateId*: II [1..1] = &quot;COCD_TP145200GB01#AssignedAuthor&quot;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode*: = PSN</td>
</tr>
<tr>
<td>determinerCode*: = INSTANCE</td>
</tr>
<tr>
<td>name*: ON [1..1]</td>
</tr>
<tr>
<td>templateId*: II [1..1] = &quot;COCD_TP145200GB01#assignedPerson&quot;</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode*: = ORG</td>
</tr>
<tr>
<td>determinerCode*: = INSTANCE</td>
</tr>
<tr>
<td>id*: II [1..1]</td>
</tr>
<tr>
<td>name*: ON [1..1]</td>
</tr>
<tr>
<td>templateId*: II [1..1] = &quot;COCD_TP145200GB01#representedOrganization&quot;</td>
</tr>
</tbody>
</table>

1..1 representedOrganization *
1..1 assignedPerson

21.1.1 Class - AssignedAuthor

<table>
<thead>
<tr>
<th>AssignedAuthor</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode*: = ASSIGNED</td>
</tr>
<tr>
<td>id*: SET&lt;II&gt; [1..*]</td>
</tr>
<tr>
<td>code*: CV CWE [1..1] &lt;= JobRoleName</td>
</tr>
<tr>
<td>addr: SET&lt;AD&gt; [0..*]</td>
</tr>
<tr>
<td>telecom: SET&lt;TEL&gt; [0..*]</td>
</tr>
<tr>
<td>templateId*: II [1..1] = &quot;COCD_TP145200GB01#AssignedAuthor&quot;</td>
</tr>
</tbody>
</table>

id

One or more identifier(s) including local identifiers which identify the person who is the author.

- The *root* attribute shall contain the OID for the identifying system.
- The *extension* attribute shall contain the author’s identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used
Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

- `<id nullFlavor="NI"/>`

**code**

Any code that describes a person's job role.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The *code* attribute shall contain the person's job role code
- The *codeSystem* attribute shall contain the OID for the code system
- The *displayName* attribute shall carry the person's job role name

Note there is a default vocabulary called JobRoleName which uses an OID of 2.16.840.1.113883.2.1.3.2.4.17.124. The code is CWE so alternative coding systems (vocabularies) may be used when required. The relevant OID of the coding system must be used when using an alternative coding system.

**addr**

A set of addresses associated with the role.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

**telecom**

A set of telecommunication addresses associated with the role.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

### 21.1.2 Class - Person

```xml
Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN[1..1]
templateId*: II[1..1] = "COCD_TP145200GB01#assignedPerson"
```

**name**

The name of the person
21.1.3 Class - Organization

### Organization

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
 = "COCD_TP145200GB01#representedOrganization"
```

**id**

A valid identifier that uniquely identifies the Organisation.

- The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The *extension* attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.

This shall use the name associated with the ODS code.

---

### 21.2 PatientUniversal (COCD_TP145201GB)

#### Organization

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
telecom: SET<TEL> [0..1]
templateId*: II [1..1]
 = "CDA:Organization:ProviderType"
```

#### PatientUniversal (COCD_TP145201GB)

```
PatientUniversal
(COCD_TP145201GB)
A universal template for patient demographics [DRAFT]
```

#### PatientRole

```
PatientRole
classCode*: = PAT
id*: SET<II> [1..1]
addr: SET<AD> [0..4]
telecom: SET<TEL> [0..1]
templateId*: II [1..1]
 = "COCD_TP145201GB01#PatientRole"
```

#### Patient

```
Patient
classCode*: = PSN
determinerCode*: = INSTANCE
name*: SET<PN> [1..*]
templateId*: II [1..1]
administrativeGenderCode*: CV CNE [1..1] <= Sex
birthTime*: TS [1..1]
```

#### LanguageCommunication

```
LanguageCommunication
(languageCommunication)
languageCode*: CS CNE [1..1] <= HumanLanguage
modeCode: CV CNE [0..1] <= LanguageAbilityMode
proficiencyLevelCode: CS CNE [0..1] <= LanguageAbilityProficiency
preferenceInd: BL [0..1]
templateId*: II [1..1]
 = "COCD_TP145201GB01#languageCommunication"
```
21.2.1 Class - PatientRole

This class carries information about the patient role.

**PatientRole**

| classCode*: = PAT |
| id*: SET<II> [1..*] |
| addr: SET<AD> [0..*] |
| telecom: SET<TEL> [0..*] |
| templateId*: II [1..1] = "COCD_TP145201GB01#PatientRole" |

**id**

This should be the NHS Number where available

For a verified NHS Number:

- The *root* attribute shall contain the OID 2.16.840.1.113883.2.1.4.1
- The *extension* attribute shall contain the 10 digit NHS number.

For an unverified NHS Number:

- The *root* attribute shall contain the OID 2.16.840.1.113883.2.1.3.2.4.18.23
- The *extension* attribute shall contain the 10 digit NHS number.

In exceptional circumstances where the NHS number is not used, in order to identify the patient, one or more identifier(s) including local identifiers can be used, where:

- The *root* attribute shall contain the OID 2.16.840.1.113883.2.1.3.2.4.18.24
- The *extension* attribute shall contain the patient identifier.

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

- `<id nullFlavor="NI"/>`

**addr**

A set of addresses associated with the role.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

**telecom**

A set of telecommunication addresses associated with the role.

There are two optional additional components:

- The *use* attribute may be used
• The `useablePeriod` child element may be used

### 21.2.2 Class - Patient

The class carries information about the person who is the patient.

```
Patient
classCode*: = PSN
determinerCode*: = INSTANCE
name*: SET<PN> [1..*]
templateId*: II [1..1] = "COCD_TP145201GB01#patientPatient"
administrativeGenderCode*: CV CNE [1..1] <= Sex
birthTime*: TS [1..1]
```

**name**

The set of names associated with the patient.

There are two optional additional components:-

• The `use` attribute may be used
• The `validTime` child element may be used

An appropriate nullFlavor may be used if required.

**administrativeGenderCode**

The gender of the person.

• This code is for administrative purposes only and does not imply a particular genetic or physical sex.

This is a code taken from the Sex vocabulary.

The Coded Plain datatype flavour of Coded Value (CV) shall be used to carry this information as follows:

• The `code` attribute shall contain a code from the relevant vocabulary
• The `codeSystem` attribute shall contain the OID for the vocabulary
• The `displayName` attribute shall carry a description associated with the code in the vocabulary

An appropriate nullFlavor may be used if required.

**birthTime**

The date and time of birth of the patient, to the level of accuracy that is available.

An appropriate nullFlavor may be used if required.
### 21.2.3 Class - Organization

A class which carries information about the organisation which provides the care to the patient. The actual organisation will be the organisation which has the relationship with the patient in the context of the document.

```xml
<Organization
  classCode*: = ORG
  determinerCode*: = INSTANCE
  id*: II [1..1]
  name*: ON [1..1]
  telecom: SET<TEL> [0..*]
  templateId*: II [1..1] = "COCD_TP145201GB01#providerOrganization"
  addr: AD [0..1]
  standardIndustryClassCode*: CV CNE [1..1]
  <= CDAOrganizationProviderType
/>
```

**id**

A valid identifier that uniquely identifies the organisation, as follows:

- The *root* attribute shall contain an OID with the value 
  "2.16.840.1.113883.2.1.3.2.4.19.1"
- The *extension* attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.
This shall use the name associated with the ODS code carries in the id attribute.

**telecom**

A set of telecommunication addresses associated with the organisation.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

**addr**

An optional address of the organisation.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used
standardIndustryClasscode

This is a code taken from the vocabulary listed to show the type of provider.

The Coded Plain datatype flavour of Coded Value (CV) shall be used to carry this information as follows:

- The `code` attribute shall contain a code from the relevant vocabulary
- The `codeSystem` attribute shall contain the OID for the vocabulary
- The `displayName` attribute shall carry a description associated with the code in the vocabulary

The only current example of this is to provide the patient’s GP Practice

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>GP Practice</td>
<td></td>
</tr>
</tbody>
</table>

21.2.4 Class - LanguageCommunication

A class used to hold details of the languages used by the patient including their preferred language and proficiency of languages.

```
LanguageCommunication
(LanguageCommunication)

languageCode*: CS CNE [1..1] <= HumanLanguage
modeCode: CV CNE [0..1] <= LanguageAbilityMode
proficiencyLevelCode: CS CNE [0..1] <= LanguageAbilityProficiency
preferenceInd: BL [0..1]
templateId*: II [1..1] =
"COCD_TP145201GB01#languageCommunication"
```

languageCode

A code taken from the HumanLanguage vocabulary.

The Coded Only datatype flavour is used to carry this information as follows:

- The `code` attribute shall contain a code from the relevant vocabulary.

modeCode

A code taken from the HL7 LanguageAbilityMode vocabulary.

The Coded Plain datatype flavour of Coded Value (CV) shall be used to carry this information as follows:

- The `code` attribute shall contain a code from the relevant vocabulary
- The `codeSystem` attribute shall contain the OID for the vocabulary
- The `displayName` attribute shall carry a description associated with the code in the vocabulary
proficiencyLevelCode

A code taken from the HL7 LanguageAbilityProficiency vocabulary.

The Coded Only datatype flavour is used to carry this information as follows:

- The code attribute shall contain a code from the relevant vocabulary.

preferenceInd

Indicates if an instance of a language is preferred by the patient.

21.3 RecipientPersonUniversal (COCD_TP145202GB)

A template to represent details of a person who is the recipient of a document or message, including details of the organisation they work for.

```
IntendedRecipient
  classCode*: = ASSIGNED
  id*: SET<II> [1..*]
  recipientRoleCode: CV CWE [0..1] <= JobRoleName
  templateId*: II [1..1] = "COCD_TP145202GB01#IntendedRecipient"

Person
  classCode*: = PSN
determinerCode*: = INSTANCE
  name*: ON [1..1]
  templateId*: II [1..1] = "COCD_TP145202GB01#assignedPerson"

Organization
  classCode*: = ORG
determinerCode*: = INSTANCE
  id*: II [1..1]
  name*: ON [1..1]
  templateId*: II [1..1]
  "COCD_TP145202GB01#representedOrganization"
```

21.3.1 Class - IntendedRecipient

id

One or more identifier(s) including local identifiers which identify the person who is the intended recipient.

- The root attribute shall contain the OID for the identifying system.
- The extension attribute shall contain the intended recipient’s identifier.
Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used.

Where no identifier is available a null flavour of "NI" (no information) shall be used, as shown below:

- `<id nullFlavor="NI"/>`

**telecom**

A set of telecommunication addresses associated with the intended recipient.

There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

**recipientRoleCode**

Any code that describes the intended recipient’s job role.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The *code* attribute shall contain the person's job role code
- The *codeSystem* attribute shall contain the OID for the code system
- The *displayName* attribute shall carry the person's job role name

### 21.3.2 Class - Organization

A class to hold details of the recipient’s organisation.

```xml
<Organization
  classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
  = "COCD_TP145202GB01#representedOrganization"

id

A valid identifier that uniquely identifies the Organisation.

- The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The *extension* attribute shall contain the ODS code (formerly known as the NACS code)

name
The name of the organisation.
This shall use the name associated with the ODS code.

21.3.3 Class - Person
A class to hold details of the person recipient intended to receive the document or message.

```
Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145202GB01#assignedPerson"
```

name
The name of the person

21.4 RecipientOrganizationUniversal (COCD_TP145203GB)
This template is used to define the recipient organisation. This is used in messages where the requirement is only to deliver to an organisation and no local routing information is carried / available to define a more detailed delivery point.

```
RecipientOrganizationUniversal
(classCode*: = ORG

determinerCode*: = INSTANCE

name*: ON [1..1]
templateId*: II [1..1] = "COCD_TP145203GB02#representedOrganization"
```

21.4.1 Class - IntendedRecipient
A set of telecommunication addresses associated with the intended recipient organisation.

```
IntendedRecipient
(classCode*: = ASSIGNED
telecom: SET<TEL> [0..*]
templateId*: II [1..1] = "COCD_TP145203GB02#IntendedRecipient"
```

telecom
A set of telecommunication addresses associated with the intended recipient organisation.
There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

### 21.4.2 Class - Organization

A class to hold details of the recipient organisation.

#### Organization

- classCode*: = ORG
- determinerCode*: = INSTANCE
- id*: # [1..1]
- name*: ON [1..1]
- templateId*: II [1..1]
  = "COCD_TP145203GB02#representedOrganization"

#### id

A valid identifier that uniquely identifies the Organisation.

- The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The *extension* attribute shall contain the ODS code (formerly known as the NACS code)

#### name

The name of the organisation.

This shall use the name associated with the ODS code.
21.5 RecipientWorkgroupUniversal (COCD_TP145204GB)

A template used to hold details of a workgroup which is not identified using SDS. Optionally the person who is a member of the workgroup may be named.

### 21.5.1 Class - RecipientWorkgroup

**id**

An identifier (including local identifiers) which identify the workgroup.

- The *root* attribute shall contain the OID for the identifying system.
- The *extension* attribute shall contain the workgroup identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used.

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

- `'<id nullFlavor="NI"/>'`

**telecom**

A set of telecommunication addresses associated with the role.
There are two optional additional components:

- The `use` attribute may be used
- The `validTime` child element may be used

**recipientRoleCode**

This holds the workgroup name in the `displayName` attribute.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The `code` attribute shall contain the default value "01"
- The `codeSystem` attribute shall contain the OID "2.16.840.1.113883.2.1.3.2.4.17.266"
- The `displayName` attribute shall carry the workgroup defined name

Where no workgroup name is available a null flavour of "NI" (no information) shall be used as shown:

- 'id nullFlavor="NI"'/

---

### 21.5.2 Class - Organization

A class to hold details of the recipient organisation associated with the workgroup.

**Organization**

- `classCode`*: = ORG
- `determinerCode`*: = INSTANCE
- `id`*: II [1..1]
- `name`*: ON [1..1]
- `templateId`*: II [1..1]
  
  = "COCD_TP145204GB01#representedOrganization"

**id**

A valid identifier that uniquely identifies the Organisation.

- The `root` attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The `extension` attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.

This shall use the name associated with the ODS code.

---

### 21.5.3 Class - Person

A class to hold details of the recipient person who is a member of the workgroup
21.6 PersonUniversal (COCD_TP145205GB)

A template to carry details of a person their role and optionally the organisation they work for.

In circumstances where an explicit template for the participation is available (for example one that describes an author), then that explicit template must be used instead of this template.

**id**

One or more identifier(s) including local identifiers which identify the person who is the entity.

- The *root* attribute shall contain the OID for the identifying system.
• The *extension* attribute shall contain the person's identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used.

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

• '<id nullFlavor="NI"/>

**telecom**

A set of telecommunication addresses associated with the Assigned Entity.

There are two optional additional components:

• The *use* attribute may be used
• The *useablePeriod* child element may be used

**code**

Any code that describes the person’s role.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

• The *code* attribute shall contain the person's job role code
• The *codeSystem* attribute shall contain the OID for the code system
• The *displayName* attribute shall carry the person's job role name

### 21.6.2 Class - Organization

A class to hold details of the person’s organisation.

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
 = "COCD_TP145205GB01#representedOrganization"
```

**id**

A valid identifier that uniquely identifies the Organisation.

• The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
• The *extension* attribute shall contain the ODS code (formerly known as the NACS code)
name
The name of the organisation.
This shall use the name associated with the ODS code.

21.6.3 Class - Person

Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145205GB01#assignedPerson"

name
The name of the person

21.7 AuthorDeviceUniversal (COCD_TP145207GB)
Template to identify a device playing the role of an author.

21.7.1 Class - AssignedAuthorDevice
This class carries details of role the device is playing.

AssignedAuthorDevice
classCode*: = ASSIGNED
id*: SET<II> [1..*]
templateId*: II [1..1] = "COCD_TP145207GB01#AssignedAuthorDevice"

id
One or more identifier(s) including local identifiers which identify the the authoring device.
The root attribute shall contain the OID for the identifying system.
The extension attribute shall contain the device's identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used.

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

- `<id nullFlavor="NI"/>`

### 21.7.2 Class - Organization

This class carries details of the organisation that owns / maintains or has responsibility for the device.

#### Organization

classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
  = "COCD_TP145207GB01#representedOrganization"

**id**

A valid identifier that uniquely identifies the Organisation.

- The root attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The extension attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.

This shall use the name associated with the ODS code.

### 21.7.3 Class - AuthoringDevice

This class contains details of the actual device.

#### AuthoringDevice

classCode*: = DEV
determinerCode*: = INSTANCE
templateId*: II [1..1]
  = "COCD_TP145207GB01#assignedAuthoringDevice"
manufacturerModelName*: SC CWE [1..1] <= ManufacturerModelName
softwareName*: SC CWE [1..1] <= SoftwareName
**manufacturerModelName**
A character string that optionally may have a code attached which describes the manufacturer model for the device.

The text must always be present if a code is present. The code maybe a local code. An appropriate nullFlavor may be used if required.

**SoftwareName**
A character string that optionally may have a code attached which describes the software for the device.

The text must always be present if a code is present. The code may be a local code. An appropriate nullFlavor may be used if required.

---

### 21.8 AuthorNonNamedPersonUniversal (COCD_TP145208GB)

This template is used to give details of an author of a document or message where the actual person’s details are either no available or not required.

![Diagram of AuthorNonNamedPersonUniversal template](image)

#### 21.8.1 Class - AssignedAuthor

This class details the author role but has no link to the actual person as this is not required for this template.

![AssignedAuthor class diagram](image)

**id**
An identifier (including local identifier) which identify the person who is the author.

- The *root* attribute shall contain the OID for the identifying system.
• The *extension* attribute shall contain the author's identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used

Where no identifier is available a null flavour of "NA" shall be used, as shown below:

  • `<id nullFlavor="NI"/>`

**code**

Any code that describes a person's job role.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

  • The *code* attribute shall contain the person's job role code
  • The *codeSystem* attribute shall contain the OID for the code system
  • The *displayName* attribute shall carry the person's job role name

### 21.8.2 Class - Organization

This class carries details of the organisation that scopes the role of author.

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
  = "COCD_TP145208GB01#representedOrganization"
```

**id**

A valid identifier that uniquely identifies the Organisation.

  • The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
  • The *extension* attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.
This shall use the name associated with the ODS code.

### 21.9 PersonWithOrganizationUniversal (COCD_TP145210GB)

A template to carry details of a person their role and the organisation they work for.
In circumstances where an explicit template for the participation is available (for example one that describes an author), then that explicit template must be used instead of this template.

### 21.9.1 Class - AssignedEntity

#### id

One or more identifier(s) including local identifiers which identify the person who is the entity.

- The *root* attribute shall contain the OID for the identifying system.
- The *extension* attribute shall contain the person's identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

- `<id nullFlavor="NI"/>`

#### telecom

A set of telecommunication addresses associated with the Assigned Entity.
There are two optional additional components:

- The *use* attribute may be used
- The *useablePeriod* child element may be used

**code**

Any code that describes the person’s role.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:

- The *code* attribute shall contain the person's job role code
- The *codeSystem* attribute shall contain the OID for the code system
- The *displayName* attribute shall carry the person's job role name

### 21.9.2 Class - Organization

A class to hold details of the person’s organisation.

```
Organization
classCode*: = ORG
determinerCode*: = INSTANCE
id*: II [1..1]
name*: ON [1..1]
templateId*: II [1..1]
  = "COCD_TP145210GB01#representedOrganization"
```

**id**

A valid identifier that uniquely identifies the Organisation.

- The *root* attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The *extension* attribute should contain the ODS code (formerly known as the NACS code)

A null flavor may be used in exceptional circumstances when no code is available

One of either the *id* or the *name* MUST carry a value.

**name**

The name of the organisation.

This should use the name associated with the ODS code.

A null flavor may be used in exceptional circumstances when no name is available

One of either the *id* or the *name* MUST carry a value.
21.9.3 Class - Person

Person
classCode*: = PSN
determinerCode*: = INSTANCE
name*: PN [1..1]
templateId*: II [1..1] = "COCD_TP145210GB01#assignedPerson"

name
The name of the person

21.10 HealthCareFacilityUniversal (COCD_TP145211GB)

A template to carry details of a Health care facility in as much detail as held on the system sending the document or message. The health care facility is where the encompassing encounter took place, or with which the encompassing encounter is associated.

Note: When the Organization and Place classes are not used then the HealthCareFacility.id must be populated with a value.
21.10.1 Class - HealthCareFacility

HealthCareFacility

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode</td>
<td>= SDLOC</td>
<td></td>
</tr>
<tr>
<td>id</td>
<td>SET&lt;II&gt; [0..*]</td>
<td></td>
</tr>
<tr>
<td>code</td>
<td>CV CNE [1..1] &lt;= CDACareSettingTypeSnCT</td>
<td>One or more identifier(s) including local identifiers which identify the role of the health care facility.</td>
</tr>
<tr>
<td>templateId</td>
<td>II [1..1] = &quot;COCD_TP145211GB01#HealthCareFacility&quot;</td>
<td>The root attribute shall contain the OID for the identifying system. The extension attribute shall contain the healthcare facility identifier.</td>
</tr>
</tbody>
</table>

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used.

**id**

A valid identifier that uniquely identifies the Organisation.

- The root attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"

21.10.2 Class - Organization

A class to hold details of the organisation which owns/ provides the health care facility.

Organization

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>classCode</td>
<td>= ORG</td>
<td></td>
</tr>
<tr>
<td>determinerCode</td>
<td>= INSTANCE</td>
<td></td>
</tr>
<tr>
<td>id</td>
<td>II [1..1]</td>
<td></td>
</tr>
<tr>
<td>name</td>
<td>ON [1..1]</td>
<td></td>
</tr>
<tr>
<td>templateId</td>
<td>II [1..1] = &quot;COCD_TP145211GB01#serviceProviderOrganization&quot;</td>
<td></td>
</tr>
</tbody>
</table>

**id**

A valid identifier that uniquely identifies the Organisation.

- The root attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
• The \textit{extension} attribute shall contain the ODS code (formerly known as the NACS code)

\textbf{name}

The name of the organisation.
This shall use the name associated with the ODS code.

\textbf{21.10.3 Class - Place}

This class can be used to provide further information about the healthcare facility such as the name or address

\begin{lstlisting}[language=XML]
Place
classCode*: = PLC
determinerCode*: = INSTANCE
name*: TN [1..1]
templateId*: II [1..1] = "COCD_TP145211GB01#location"
addr*: AD [1..1]
\end{lstlisting}

\textbf{name}

The name of the place which is the healthcare facility. This uses the Trivial Name datatype and therefore can be used for temporary service delivery locations such as Leeds railway station, as well as for things like ‘ward 6’.

\textbf{addr}

The address of the place which is the healthcare facility.
An appropriate nullFlavor may be used.
21.11 WorkgroupUniversal (COCD_TP145212GB)

A template to carry details of a workgroup not identifiable using SDS.

21.11.1 Class - Workgroup

```
Workgroup
  classCode*: = ASSIGNED
  id*: II [1..1]
  code*: CV CWE [1..1] <= WorkgroupRoleName
  telecom: SET<TEL> [0..*]
  templateId*: II [1..1] = "COCD_TP145212GB01#Workgroup"

id

An identifier (including local identifiers) which identifies the workgroup.

  - The root attribute shall contain the OID for the identifying system.
  - The extension attribute shall contain the workgroup identifier.

Where no OID is available the OID "2.16.840.1.113883.2.1.3.2.4.18.24" shall be used

Where no identifier is available a nullFlavor of "NI" (no information) shall be used, as shown below:

  - '<id nullFlavor="NI"/>'

code

This holds the workgroup name in the displayName attribute.

The Coded Plain flavour of the Coded Value (CV) data type shall be used to carry this information as follows:
Representing People and Places using NHS CFH Templates

- The `code` attribute shall contain the default value "01"
- The `codeSystem` attribute shall contain the OID "2.16.840.1.113883.2.1.3.2.4.17.266"
- The `displayName` attribute shall carry the workgroup defined name

Where no workgroup name is available a null flavour of "NI" (no information) shall be used as shown:

- `<id nullFlavor="NI"/>`

**telecom**

A set of telecommunication addresses associated with the role.

There are two optional additional components:

- The `use` attribute may be used
- The `validTime` child element may be used

### 21.11.2 Class - Organization

A class to hold details of the organisation responsible for the workgroup.

- **Organization**
  - `classCode`*: = ORG
  - `determinerCode`*: = INSTANCE
  - `id`*: II [1..1]
  - `name`*: ON [1..1]
  - `templateId`*: II [1..1]
    - "COCD_TP145204GB01#representedOrganization"

**id**

A valid identifier that uniquely identifies the Organisation.

- The `root` attribute shall contain an OID with the value "2.16.840.1.113883.2.1.3.2.4.19.1"
- The `extension` attribute shall contain the ODS code (formerly known as the NACS code)

**name**

The name of the organisation.

This shall use the name associated with the ODS code.
21.12 RelatedSubject (COCD_TP145213GB01)

The subject participant for which attachment is recorded in the document.