

Consolidated CDA (C-CDA): Support Task Force

3/14/2013

C-CDA Task Force Agenda

- Welcome
- Update on report
- Report recommendations
- Pilot proposed support process
- Update on support tools
- No meeting 3/21
- Next steps

Participants

Participants	
Lisa Nelson (me)	
 Brett Marquard (Host)	
Benjamin Flessner	
Brian Scheller (Healthwise)	
Calvin Beebe	
David Sundaram-Stukel	
Diana Behling (internal)	
Jeff Brown	
Kate Hamilton	
Rita Altamore (WA DOH)	
Russell Ott	
Sean Muir	
Vinayak Kulkarni(VK)	
William Ryan	

Mike Kingery

Motions

- No formal motions
- TF supports including the tool matrix in the report
- TF is interested in seeing a demo of tools included in the tool matrix

Recommendations

Recommendation	Proposed Action
Adopt the proposed process immediately	Develop a plan/timeline for development and deployment of the C-CDA TF recommendations. (Future WG may require PSS)
Take a phased approach where the most readily available tooling environment is implemented initially and alternate tooling can be planned for later phases (Consider partners with deployed tooling solutions)	Review cost/support/deployment model, and its ok to change in future. Never perfect tool, need to be able to port ->Pilot ok with excel/word, but not scalable or something we want to maintain long-term. Get software setup.
Develop the needed internal governance SOPs to support the process	
Develop a business plan to address resource challenges	
Integrate with larger HL7 strategic business plans	

Pilot Support Process

- Posted question: Smoking status value set does not align with MU stage 2
- Posted question: Three ways to record a problem status?
- Posted question: Results organizer requirement?

Support Tool – Knowledge Base

		Knowledge Base		
		Wikispaces	Confluence	HingX
Shared Requirements	Access controls	Yes	Yes - unified accounts with Jira	Yes
	Anonymous Access	Yes	Yes	Yes
	Searching	Yes - basic capabilities	Yes - robust searching through Jira tie-ins	Yes
Knowledge Base Functionality	Cross-referencing	Yes - basic linking capabilities to other wiki pages	Yes - robust linking to other articles and related Jira issue tickets	Yes - can link external resources and add metadata about resource; in general, resource is hosted elsewhere and must be created prior to linking to HingX
	Issue ticket integration	No	Yes - integration with Jira issue tickets	No
	Threaded Comments	Yes - basic comments, but not well integrated on page	Yes	Yes
	External access	Possible via site specific Google search	Possible via site specific Google search	Possible via site specific Google search

Support Tool – Discussion Forum

		Discussion Forum		
		phpBB	Confluence	HingX
Shared Requirements	Access controls	Yes	Yes	Yes
	Anonymous Access	Yes - anonymous users may post after completing a CAPTCHA	Yes - anonymous users may post after completing a CAPTCHA	No - anonymous users can read discussion forum but cannot write
	Searching	Yes	Yes	Yes - robust searching based on resource metadata
Discussion Forum Functionality	Threaded Discussions	Yes	Yes - able to be linked to KB and Jira issue tickets	Yes
	Categorized Discussion Areas	Yes	Yes	Yes
	Moderator Administration	Yes	Yes	
	Graphical User Group Differentiation	Yes - profile picture	Yes - profile picture	Yes - profile picture
	Supports Anonymous Posts	Yes	Yes	
	External Access	Yes	Yes	Yes

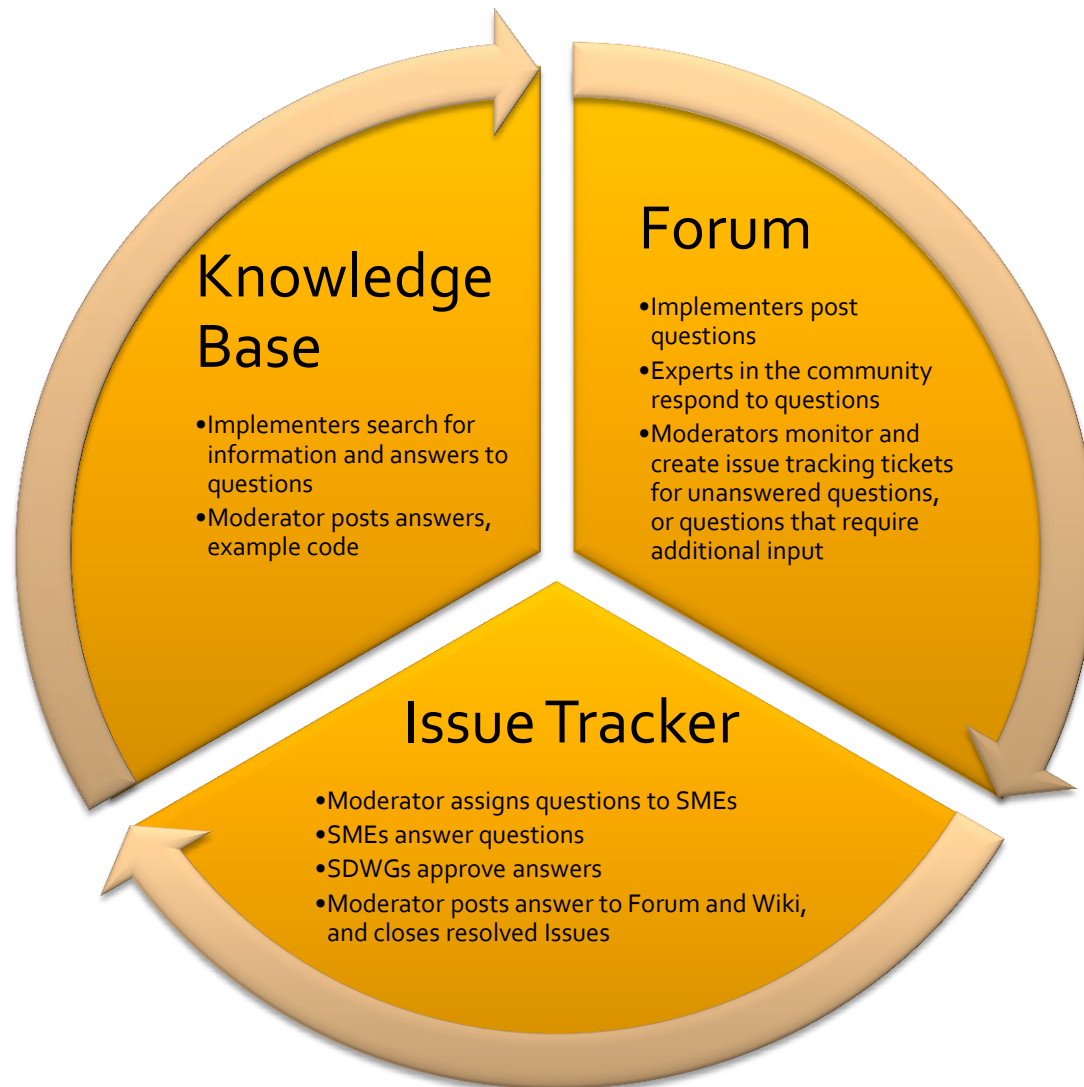
Support Tool – Issue Tracker

		Issue Tracker	
		Jira	Gforge
Shared Requirements	Access controls	Yes - unified accounts with Confluence knowledge base and discussion forum	Yes
	Anonymous Access	Yes - anonymous users can submit issues and browse dashboards	Yes - anonymous users can browse issues, but cannot submit issues
	Searching	Yes - saved searches for dashboard creation	Yes
Issue Tracker Functionality	Customize Issue Metadata	Yes - very customizable	Yes - initial customization may be difficult due to interface
	Support multiple attachments per issue	Yes	Unknown
	Support cross-linking of disparate issue types	Yes - robust linking	Unknown
	Customize workflow per issue type	Yes - very customizable	Yes
	Workflow automation scripting	Yes	Unknown
	Notifications	Yes	Yes
	Customizable Role-based Dashboards	Yes	Unknown
	Customizable Queries	Yes	Yes
	Reporting	Yes - dashboards and reporting	Yes

Characteristics of a good answer

- Date of creation
- Owner info
 - Could be standards SME or SDWG if the A-ticket gets escalated to SDWG
 - check box to hide identity when posted to K-base
 - Name, telecom phone and e-mail contacts for Implementer
- A-ticket type
- Status (see A-ticket state model for possible values)
- Status comment (notes)
- Single, well-formed Primary question (should encompass all underlying questions)
- Questions addressed: used to show the set of Q-tickets linked to this A-ticket (sub questions under the Primary question)
- Short description to clarify how/why the included explanation and example(s) address the question being answered.
- Referenced sample(s), where appropriate
 - example included in stub at the document-level, or section-level,
 - validate against the CDA-schema
 - Schematron, if appropriate, in a standard stub document.
- Tagging:
 - CDA RMIM-based classification
 - Template identification: (filling in one, populates the other)
 - Template name
 - Template OID
 - C-CDA Guide heading
 - CDA R2 standard Heading
 - Other meaningful phrase(s)

Update on Tools



Contact Information

- Primary SDWG points of contact
 - Brett Marquard (brett@riverrockassociates.com)
 - Lisa Nelson (LisaRNelson@cox.net)

Q-ticket contains:

- Submitter
 - Date of submission
 - Submitter Info
 - Name, telecom phone and e-mail contacts for Implementer
 - HL7 Member number (can be blank)
 - check box to hide identity when posted to K-base
 - Short description to clarify the question
 - Referenced sample(s), if appropriate/provided
 - Single, well-formed question
 - Tagging:
 - CDA RMIM-based classification
 - Template identification: (filling in one, populates the other)
 - Template name
 - Template OID
 - C-CDA Guide heading
 - CDA R2 standard Heading
 - Other meaningful phrase(s)
- Moderator
 - Q-ticket type
 - Link to prior Question/Answer pair which did not meet the Implementer's need
 - Question Owner
 - Status (see Q-ticket state model for possible values)
 - Status Comment (notes)
 - Group with: (list of other similar Q-tickets – used to show the set of questions linked to a single A-ticket)

Q-ticket Types

Q-ticket types:	Initial possible dispositions
Request for C-CDA Clarification	Use process under pilot
C-CDA Errata Report	Escalate to SDWG
CDA R2 Extension Report	Escalate to SDWG
CDA R2 New Feature Request	Escalate to SDWG
CDA R3 New Feature Request	Escalate to SDWG
CDA Request for Specific Assistance	Escalate to SDWG
Non-standards question	Escalate to appropriate party or mark out of scope

Q-ticket status (state model)

State	Classification	Possible transitions
Pending	Status when a Q-ticket has been started, but more information is needed from submitter to complete it as well-formed.	Open ; Closed
Open	Status when Q-ticket is confirmed to be well formed and appropriate to be escalated to Tier 2	Open ; Assigned; Closed
Assigned	Question requires SDWG review. Clear policy is needed when to classify this type.	Closed
Escalated	Additional assistance is required by SDWG or another work group to answer this question	Assigned
SME Closed	Status when an Q-ticket has been closed by finding an existing Answer	Closed
Closed	Classification after the answer is complete an implementers have been notified.	

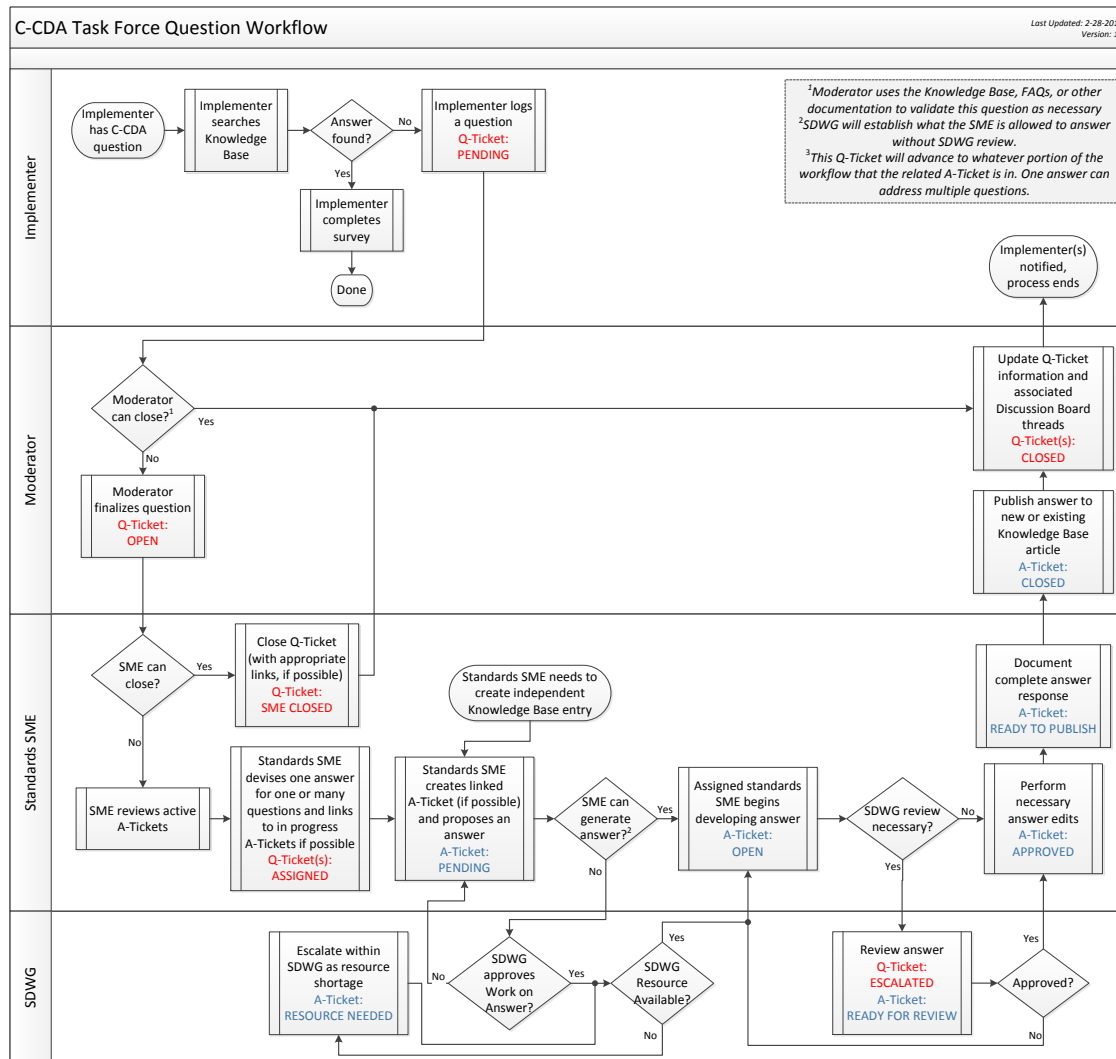
A-ticket Types

Q-ticket types:	Description
C-CDA Clarification	Contains implementation guidance and clarification for Consolidated CDA

A-ticket status (state model)

State	Classification	Possible transitions
Pending	An "Answer Project" has been proposed.	Open; Resource Needed
Resource Needed	An Answer Project requires resources to be found.	Open
Open	An Answer Project has been resourced and is in progress of being developed	Ready for Review; Approved
Ready for Review	The Answer is scheduled to be reviewed within HL7 SDWG or as required.	Approved
Approved	The Answer is approved for technical content is ready for final documentation	Ready to publish
Ready to Publish	The Answer is fully documented and ready to be published in the K-Base	Closed
Closed	The Answer is posted in the K-Base	

Support work flow



C-CDA Implementation Support Task-Force Charter (approved 2/7)

SDWG task force (1/3/2013)

Setup a task force to evaluate process for managing SDWG questions.

Scope and Mission

Recommend to SDWG a process for managing, and responding to implementer questions on C-CDA.

Deliverables for initial SDWG task force by 3/1

- Clarified problem statement, and solution requirements
- Draft high-level support process flow
 - Suggested vocabulary to classify question and answers
 - Develop template for questions, and answers
 - Develop roles and responsibilities
- Recommended tooling requirements and approach
 - Identify existing tools to support the proposed process
 - Initial hosting of tool, may be different than long term home.
- Readiness for pilot with approval from SDWG

Problem statement

ONC named the HL7 SDWG published C-CDA in MU Stage 2. A support mechanism is required to support the increased demand, due to limited examples, and ambiguous conformance statements. The industry does not currently have a mechanism to respond to implementer inquires.

Solution Requirements

- Rapid start-up, and results, validated by implementer feedback
- Tools to support communication process, and governance process
- Common terminology to parse issues and determine which process they go through
- Mechanism to collaborate with other HL7 working groups when C-CDA content overlaps
- Includes a searchable “examples library” for C-CDA
- Prioritized support for MU stage 2 data elements
- Ensures both immediate/tactical/interim resolution, and monitoring and follow-through of longer-term validation of interim solution and/or alternative via standards evolution process

Review of support roles

	Moderator	SME
Problem analysis capabilities	Capable of forming a single question to summarize the issue	Capable to perform in depth analysis
Availability	High level*	As available
Experience with the selected tool	Expert	Moderate
Ability to propose answers	Could provide answers from FAQ sheets, or knowledge of prior answers from KB	Yes. SME will have significant CDA R2 experience Vocabulary experience
Success criteria	Quick response, and categorization of questions	Able to coordinate with SDWG, and bring answer to completion
Role	Hired administrator	Volunteers?