Consolidated CDA (C-CDA): Support Task Force

2/21/2013
Notes added during meeting by Lisa Nelson

C-CDA Task Force Agenda

- Welcome
- Finalize support work flow
- Discuss implementer satisfaction questions
- Review moderator and SME roles
- Consider the companion guide from S&I
    - Should the scope of that doc remain as is and be published as an informative document, or
    - Incorporate guidance from this pilot as a new section in the document – increase scope to include guidance from this group?
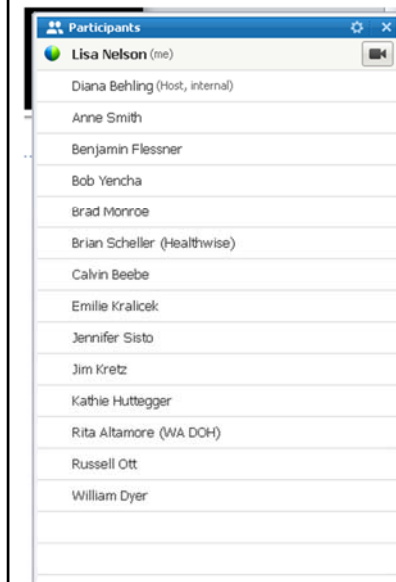- Update on support tools
- Next steps

Motion: to finalize the proposed workflow as shown in the visio diagram C-CDA Process Workflow v05.pdf
- Made by: Jim Kretz
- Second: Brian Scheller
- Abstain (2), Against (0), For (12)

Motion: to ballot the S&I Consolidated CDA Companion Guide as an Informative Document with existing scope
- Made by: Calvin Beebe
- Second: Brett Marquard
- Abstain (1), Against (0), For (13)

Participants

Participants	
🌐 **Lisa Nelson** (me)	📹
Diana Behling (Host, internal)	
Anne Smith	
Benjamin Flessner	
Bob Yencha	
Brad Monroe	
Brian Scheller (Healthwise)	
Calvin Beebe	
Emilie Kralicek	
Jennifer Sisto	
Jim Kretz	
Kathie Huttegger	
Rita Altamore (WA DOH)	
Russell Ott	
William Dyer	

- Brett Marquard

Finalize support work flow

- see work flow C-CDA Process Workflow v05.pdf

Implementer satisfaction questions

- Was this answer helpful?
  - Y/N/Somewhat
- How much effort did you put forth to use this article?
  - Very low, low, moderate, high, very high
- Tell us why and what we can do to improve this information?
  - Text
- We may want to keep the questions simple and minimal
- Allow users to vote on answers to cause the answer to have a higher weighting as more helpful
  - This might make sense as a requirement for Knowledge Base
  - This might be better if it assessed "Usefulness" rather than "Accuracy"
- For measuring success:
  - Can you measure if a follow-up question needed to be asked?
  - Requirement: implementers can reference a previously answered question
  - Consider how to capture the threaded nature of the follow-on question

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	X	X
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?

When Question tickets close, could the link to the KB article be included. We don't want the moderator to become a bottleneck.
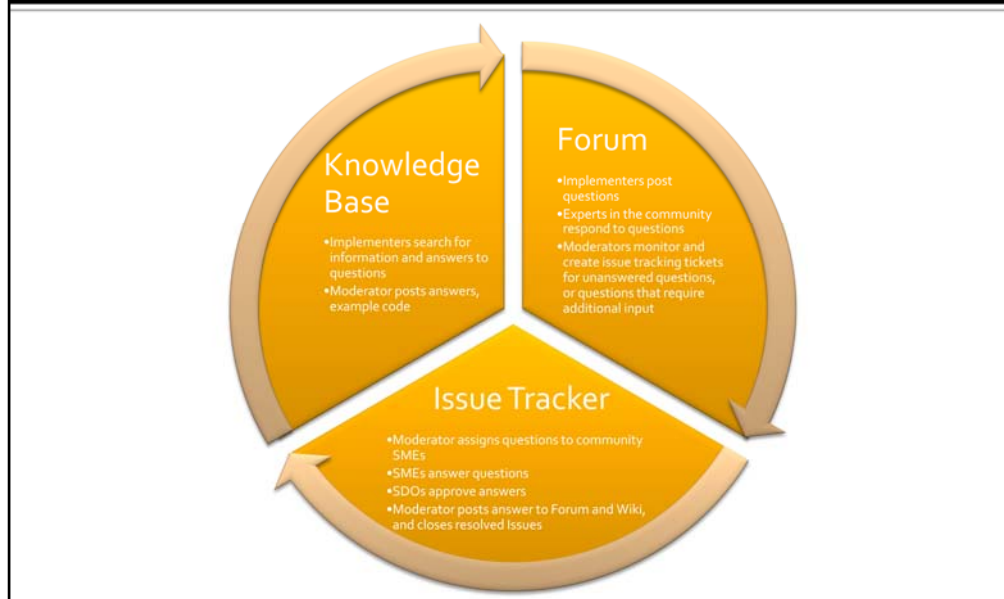
Requirement We need a method to go from unstructured discussion to a structure "asked" question. (A way to move from Forum to Issue Tracker.)

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)
  - Field to link to a prior answered question(new 2013-02-21)
- 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
Closed	Status when an Q-ticket has been closed either by finding an existing Answer, or when the closing of an A-ticket triggers the Q-ticket to be closed.	

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)

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.	
Resource Needed	An Answer Project requires resources to be found.	
Open	An Answer Project has been resourced	
In Progress	The Answer is being developed.	
Ready for Review	The Answer is scheduled to be reviewed within HL7 SDWG or as required.	
Approved	The Answer is approved as written.	
Closed	The Answer is posted in the K-Base	

Support work flow

- See C-CDA Process Workflow.pdf
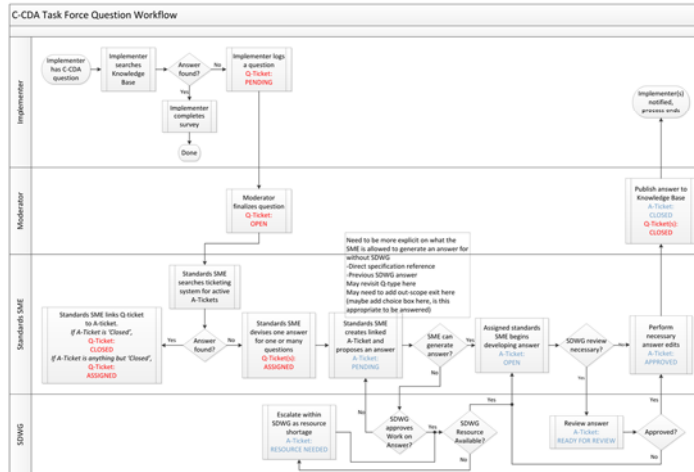
C-CDA Implementation Support Task-Force Charter (approved 2/7)

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

Characteristics of a Good Charter

- Clear set of objectives
- Reasons for launching the project
- Defined scope
- Reference point for the project in the future

Proposed C-CDA Task Force Charter

Goals
- Prioritize support for MU stage 2 data elements
- Rapid start-up, and results, validated by implementer feedback
- Develop common terminology to parse issues to determine which process they go through
- Increase consistency of C-CDA adoptions
- Reduce need for pre-negotiation in the processing of discrete data
- Pilot 'micro' support model for HL7
- Create, and manage a work list for immediate, and long-term C-CDA issues

Project need
- C-CDA focuses on template definition, not implementation guidance
- There isn't a proven operational model for supporting a standard for rapid, large-scale adoption

Goals:
1. Increase consistency of C-CDA adoptions
2. Reduce need for pre-negotiation in the processing of discrete data stored in CDA documents (Brett – remember we are not talking about messages, CDAs are persistent data containers---mini storage repositories for a moment in time, which can last and be processed forever.)
3. Pilot a "small-scale" portion of the support model envisioned for HL7

Project need:
1. C-CDA focuses on template definition, not implementation guidance.
    - It focused on defining a harmonized set of templates for 9 CDA document types. It did not focus on providing implementation guidance and a rich library of examples to support implementer's to consistently use the templates. That need remains unfilled.
2. There isn't a proven operational model for supporting a standard for rapid, large-scale adoption.

Proposed C-CDA Task Force Charter

Scope
- Respond, or route, questions posed by the implementation community
- Coordinate with SDWG to determine appropriate (priority and bandwidth adjusted) response plan to ambiguous conformance statements
- Track guidance requests to completion
  - Develop and maintain additional XML examples
  - Develop and maintain internal documents, which will include authoritative guidance after SDWG approval

Out of Scope
- Implementing revisions to published conformance statements
- Providing individual support for vendors seeking certification support

In Scope:

Track information/guidance requests to identify Issues that need IG support

Work with SDWG to determine appropriate (priority and bandwidth adjusted) response plan

Record and monitor response plan execution

Develop additional XML examples

Develop informative documents

MAINTAIN repository of XML examples and informative documents

RECOMMEND revisions needed for published C-CDA DSTU (will these go to the Publishing group for processing?)

Out of Scope:

Making revisions to published C-CDA DSTU

Providing individual support for vendors seeking certification support