TEMPLATES WG Minutes Friday q1 May WGM (10 May 2013)

Attendees:

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| Name | Affiliation | email |
| John Roberts  | Tennessee DOH | john.a.roberts@tn.gov |
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Scribe: Mark Shafarman

We adjusted the agenda for time constraints, agreeing to start with the following 5 items.

1. Templates: Next DSTU (including Versioning and governance issues, and Templates ITS): IHE: Keith, dEcor: Kai; CCDA: Bob and Lisa, ITS (Andy and Kai); Governance: all
2. Schedule for Next WGM
3. Formal representative to/from Structured Docs.
4. HingX possibilities.
5. Andy: templates ITS, decor ; HingX

Discussion Items: (in order of occurrence)

1. Schedule for Next WGM; add Q2 Friday next WGM (September 2013). Otherwise the rest of the schedule is the same as the May 2013 WGM.
2. Formal representative to/from Structured Docs. After a brief discussion, Lisa Nelson is the (informal) representative for Templates in Structured Documents; and the (formal) representative for Structured Docs in Templates. Basically, she will ensure coordination between the two groups. Mark also volunteered to help Lisa (per her requests). Andy remains our Tooling WG representative.
3. Lisa will investigate the numerous CCDA extensions, and if time permits, look at HingX as a potential registry for them. Again, if time permits, Templates as a group will also investigate using the now-published HingX API to test HingX as a Templates Registry possibility. This latter would include lessons learned from the several international groups now working with Templates (including CCDA, MDHT, Lantana, DECOR, NHS, NEHTA and Infoway), integrated with the findings of the Templates Registry Business Process Analysis document.
4. Andy will complete the conversion of the Lantana templates to Templates ITS (ART-dEcor XML) format in the next few days. Keith has contacts within MDHT (and is starting to work with their templates), and will collaborate with Kai to contact them to request their participation in the Templates ITS project. He noted that they are not funded for this, so there is a volunteer bandwidth issues. We should also contact the groups listed in 4 above for their participation in the Templates ITS project.
5. Templates DSTU topics.
	1. Need to separate three levels: governance, design and implementation.
		1. Governance will include identifying the basic metadata that defines a family of templates (i.e. all the versions with a given template id). The analysis of the metadata will take into account the templates registry requirements.
		2. Design will include a detailed discussion of templates versioning and publication statuses, and the interaction between the design/version levels and the governance/registry levels, and also the interaction between the design/version levels and the implementer levels.
		3. Implementation interacts with the design/versioning levels. An implementer must always be able to know which version of a template should be used to create or validate a given instance, and also if there are any particular requirements for later re-use of the data.

All three levels may be functioning either within ‘closed’ ‘private’ organization groupings or within ‘open’ ‘public’ organizational groupings.

* 1. Versioning:
		1. DECOR (design level) uses the template id (globally unique) along with the status indication to version templates. From an implementer’s point of view, the implementer always accesses (*dynamically*) the most recent version of the template, which is denoted by the template ID and the date of the status change. For later re-use of data created/populated and or received/validated at a certain date, the implementer must be able to access the creation/population date and status to re-use the data correctly.
		2. IHE uses the publication date of a template to synchronize the implementation of the version used with a given implementation guide. This is a *static* mode of determining the template version. A technical correction doesn’t result in a new version. There is also a requirement to be able to use ‘any’ version of a template (starting with a particular publication date, and also including all later versions (all versions with later publication date)). There is also the use case in older IHE documents, when template usage was not version aware. There is also a difference in structured documents between static and dynamic versioning.

We need to distinguish with a set of use cases the versioning requirements at both the design and implementation levels, and their interactions. We will want to collect the use cases from the major implementers of templates listed above.

* 1. Content discussion. The new version of the Templates DSTU should include
		1. the Templates ITS
		2. the updated requirements for versioning of templates
		3. the governance, design and implementation levels discussed above
		4. Conformance guidance.
	2. Scheduling discussion. If possible, we would like to have a comment-level ballot for the next version of the DSTU in time for the September meeting, and a normative version next January.

Follow-ups:

1. Kai: will send update on DECOR including an
	1. Information on a demonstration project for an EKG report
	2. Data on the “building block repository “of all CDA specifications
	3. Planning for a live demo of DECOR.
2. We will start to collect the use cases that the new Templates DSTU needs to support.