

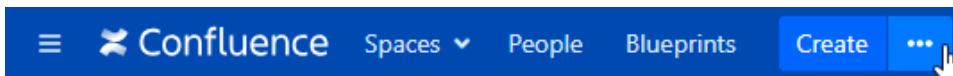
# How to Create a PSS PILOT

## Quick Reference

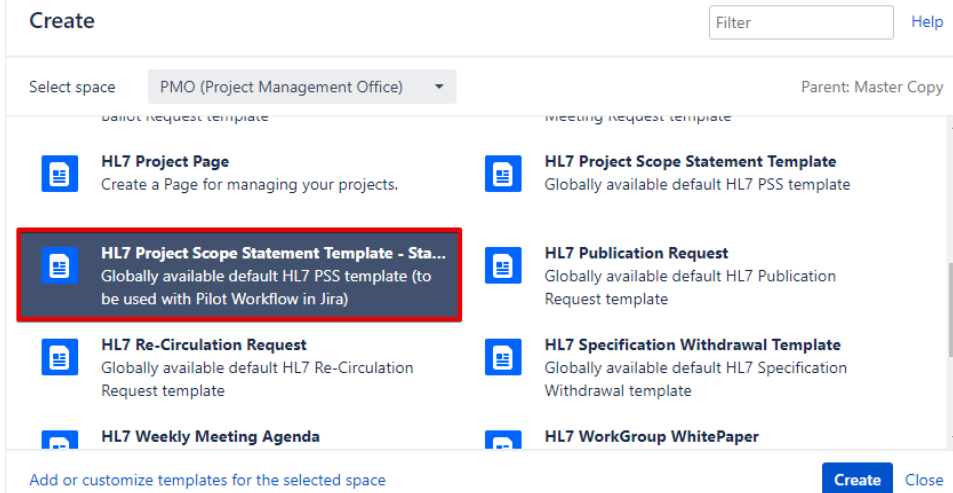
1. Create PSS in Confluence
2. Highlight Project Name on PSS and create JIRA Issue "Project Scope Statement"
3. Navigate to the JIRA Issue and edit, selecting the approving groups.
4. Select "Start Approval" to begin the workflow.
5. Reference [Project Scope Statement](#) for PSS Approval Status Overview

## Step-by-step guide

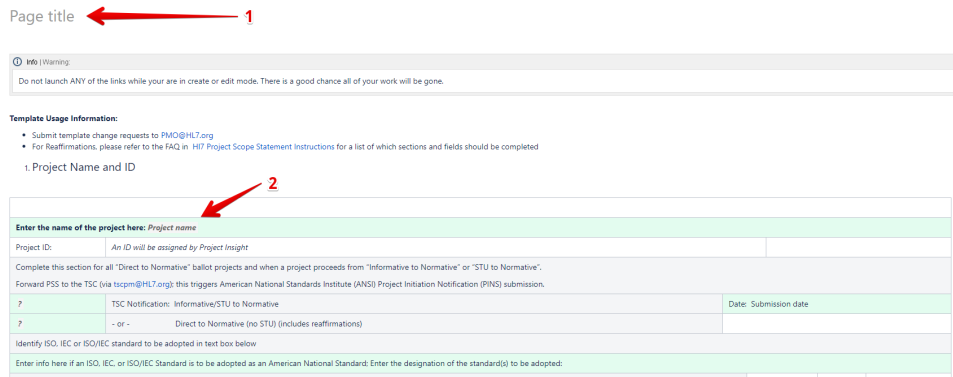
1. Navigate to the Space and Page where you would like to create a Project Scope Statement.
2. Select the ellipse at the top of the page next to the "Create" button.



3. In the pop-up window, scroll down to create from template "HL7 Project Scope Statement Template - Static". Select it, and then click "Create" at the bottom right.



4. Enter a Page Title for your New PSS (suggest using same name as Project) at Number 1 on image below. Enter Project name again on Number 2 on the image below.



5. Finish filling out the Project Scope Statement template and select "Publish" at the bottom right of the page when complete.

## PSS Pilot Start Here

6. Once the page is Published, highlight the Project name from the Body of the page (DO NOT USE THE TITLE OF THE PAGE), and move your cursor slightly upward. A popup will appear with a triple arrow icon. This will create the issue in Jira to begin workflow

### Test PSS

Created by Joshua Prociouls just a moment ago

**Warning:**  
Do not launch ANY of the links while your are in create or edit mode. There is a good chance all of your work will be gone.

#### Template Usage Information:

- Submit template change requests to [PMO@HL7.org](mailto:PMO@HL7.org)
- For Reaffirmations, please refer to the FAQ in [HI7 Project Scope Statement Instructions](#) for a list of which sections and fields should be completed

#### 1. Project Name and ID

[Create Jira issue](#)

Enter the name of the project here: **Test Project**

Project ID: *An ID will be assigned by Project Insight*

Complete this section for all "Direct to Normative" ballot projects and when a project proceeds from "Informative to Normative" or "STU to Normative" Forward PSS to the TSC (via [tscpm@HL7.org](mailto:tscpm@HL7.org)); this triggers American National Standards Institute (ANSI) Project Initiation Notification (PIN) submission.

	TSC Notification: Informative/STU to Normative
	- or - Direct to Normative (no STU) (includes reaffirmations)

Identify ISO, IEC or ISO/IEC standard to be adopted in text box below

Enter info here if an ISO, IEC, or ISO/IEC Standard is to be adopted as an American National Standard; Enter the designation of the standard(s):

7. Select "Project Scope Statement" for both "Project" and "Issue Type" and then select "Create"

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Identify ISO, IEC or ISO/IEC standard to be adopted in text box below

Enter info here if an ISO, IEC, or ISO/IEC Standard is to be adopted as an American National Standard; Enter the designation of the standard(s):

Includes text from ISO, IEC or ISO/IEC Standard; Enter the designation of the standard(s) if one or more ISO, IEC or ISO/IEC Standard is to be adopted as an American National Standard.

Select the unit of measure used in the standard; if no measurements are in the standard, select N/A

Investigative Project (aka PSS-Lite)

**Create task**

[Create multiple issues from table](#)

Project Scope Statement
Project S...

Summary:

Description:

[Create](#) [Cancel](#)

- A Jira Issue Macro will be visible, displaying a link to the Jira Issue you've just created. Select this link to move to Jira for finalization of setup for the approval process.

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- Project Name and ID

Enter the name of the project here: **Test Project** **PSS-1146** **DRAFT**

Project ID: *An ID will be assigned by Project Insight*

Complete this section for all "Direct to Normative" ballot projects and when a project proceeds from "Informative to Normative" or "STU to Normative".

- Edit the Page (top left) to select Approval Groups. NOTE: Issue Links section displays link to Confluence PSS you have just created.

Project Scope Statement / PSS-1146

## Test Project

[Edit](#) [Comment](#) [Assign](#) [More](#) [Draft](#) [Start Approval](#) [Admin](#)

**Details**

Type: **Project Scope Statement** Status: **DRAFT** (View Workflow)

Priority: **Medium** Resolution: **Unresolved**

Labels: **None**

**Description**

**Attachments**

**Issue Links**

mentioned in

[Test PSS](#)

**Activity**

All [Comments](#) [History](#) [Activity](#) [Transitions](#)

There are no comments yet on this issue.

- When "Editing" the Issue, make selections for Sponsoring Work Groups, Co-Sponsoring Workgroups, US Realm (If applicable), Management Groups, and Steering Division. Select "Update" at the bottom right when done.

Edit Issue : PSS-1146 [Configure Fields](#)

Reporter:


Start typing to get a list of possible matches.

Sponsoring Work Groups

- Anesthesia
- Arden Syntax
- Attachments
- Biomedical Research & Regulation
- Clinical Decision Support
- Clinical Genomics
- Clinical Information Modeling Initiative
- Clinical Interoperability Council
- Clinical Quality Information
- Community Based Care and Privacy
- Conformance
- Electronic Health Record
- Electronic Services and Tools
- Emergency Care
- FHIR Infrastructure
- Financial Management
- Health Care Devices
- Imaging Integration
- Implementable Technology Specifications
- Infrastructure & Messaging
- Learning Health Systems
- Mobile Health
- Modeling & Methodology
- Orders & Observations
- Patient Administration
- Patient Care

[Update](#) [Cancel](#)



11. Finally, Select "Start Approval" to begin the Approval Process. NOTE: Until this point you can make changes without notifications being sent out. Once you select "Start Approval" any affiliated groups that you have selected will be notified.

 Project Scope Statement / PSS-1146

## Test Project

[Edit](#) [Comment](#) [Assign](#) [More](#) [Draft](#) [Start Approval](#) [Admin](#)

**Details**

Type:	 Project Scope Statement	Status:
Priority:	 Medium	Resolution:
Labels:	None	
Sponsoring Work Groups:	Community Based Care and Privacy	
Co-Sponsoring Work Groups:	Clinical Quality Information	
Management Groups:	V2 Management Group	
Steering Division:	Clinical Steering Division	

**Description**

**Attachments**

