

How to Create a PSS PILOT v2

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Process Overview

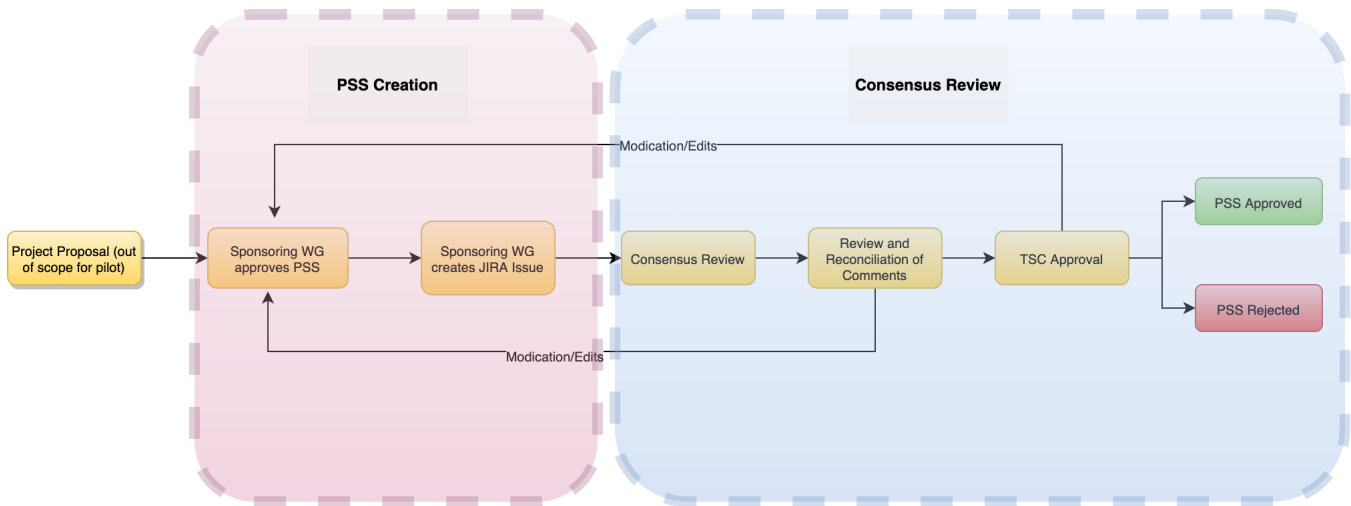
The PSS creation process begins with the creation of a PSS in Confluence. The sponsoring Workgroup or project is responsible for creating the PSS in Confluence and then creating the JIRA issue. This starts the approval process (for more information on the approval process, see [How to Review a PSS PILOT v2](#))

The key components of this step include:

- Creation/Publication of the PSS in Confluence
- Creation of a JIRA issue related to the PSS
- Identification of groups to be included in the approval in JIRA

Process Flow

This process covers the PSS Creation portion of this flow.



Quick Reference

1. Create PSS in Confluence (Step-by-Step guide - Step 2-5)
2. Highlight Project Name on PSS and create JIRA Issue "Project Scope Statement" (Step-by-Step guide - Step 6-7)
3. Navigate to the JIRA Issue and edit, selecting the approving groups. (Step-by-Step guide - Step 8-10)
4. Select "Start Approval" to begin the workflow. (Step-by-Step guide - Step 11)
5. Reference [Project Scope Statement Approvals in Jira](#) 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.

Create Filter Help

Select space **PMO (Project Management Office)** Parent: Master Copy

HL7 Project Page
Create a Page for managing your projects.

HL7 Project Scope Statement Template - Sta...
Globally available default HL7 PSS template (to be used with Pilot Workflow in Jira)

HL7 Re-Circulation Request
Globally available default HL7 Re-Circulation Request template

HL7 Weekly Meeting Agenda

HL7 Project Scope Statement Template
Globally available default HL7 PSS template

HL7 Publication Request
Globally available default HL7 Publication Request template

HL7 Specification Withdrawal Template
Globally available default HL7 Specification Withdrawal template

HL7 WorkGroup WhitePaper

Add or customize templates for the selected space

Create Close

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.

Page title ← 1

Warning:
Do not launch ANY of the links while you 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
- For Reaffirmations, please refer to the FAQ in [HL7 Project Scope Statement Instructions](#) for a list of which sections and fields should be completed

1. Project Name and ID

← 2

Enter the name of the project here: Project name	
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); 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)
Date: Submission date	
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) to be adopted:	
Includes text from ISO, IEC or ISO/IEC standard. Check here if this standard includes content that has been revised from an existing ISO, IEC or ISO/IEC standard, but is not identical or modified content.	
Yes	No

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

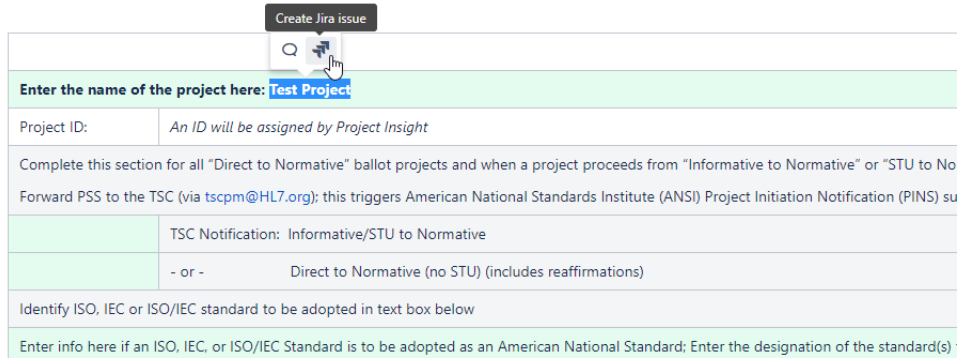
Created by Joshua Prociouso just a moment ago

Warning:
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Template Usage Information:

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1. Project Name and ID



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); this triggers American National Standards Institute (ANSI) Project Initiation Notification (PINS) 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

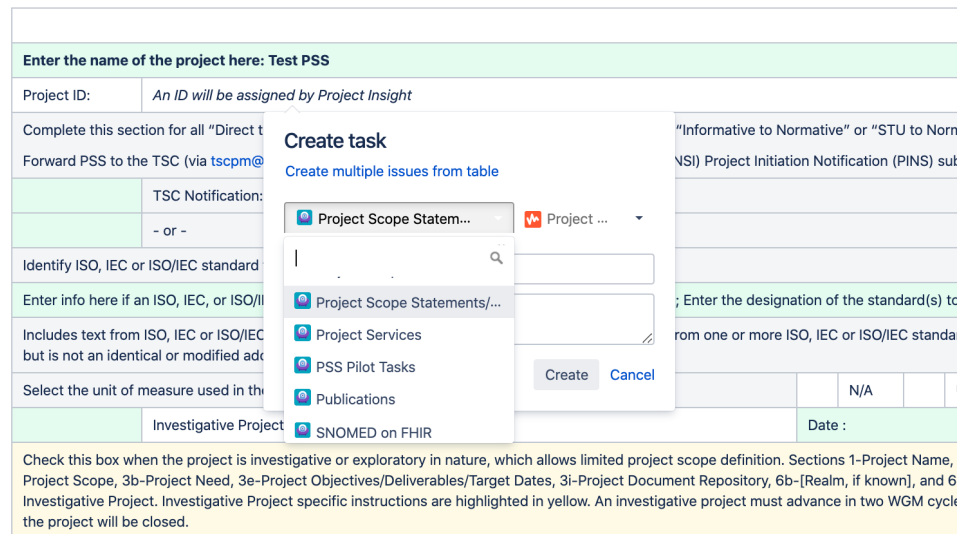
Enter info here if an ISO, IEC, or ISO/IEC Standard is to be adopted as an American National Standard: Enter the designation of the standard(s) to be adopted.

7. Select **"Project Scope Statement/Proposals"** for the "Project" and **"Project Scope Statement"** for the "Issue Type" and then select "Create"

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- 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



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

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); this triggers American National Standards Institute (ANSI) Project Initiation Notification (PINS) 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) to be adopted.

Includes text from ISO, IEC or ISO/IEC standard but is not an identical or modified addition.

Select the unit of measure used in this project

Investigative Project

Date : N/A

Check this box when the project is investigative or exploratory in nature, which allows limited project scope definition. Sections 1-Project Name, 2-Project Scope, 3b-Project Need, 3e-Project Objectives/Deliverables/Target Dates, 3i-Project Document Repository, 6b-[Realm, if known], and 6c-Project Investigative Project. Investigative Project specific instructions are highlighted in yellow. An investigative project must advance in two WGM cycles before the project will be closed.

8. 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.

Template Usage Information:

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- 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

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".

9. Edit the Page (top left) to select Review 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.

10. When "Editing" the Issue, make selections for Sponsoring Work Group (can be 1 and only 1 sponsor), Co-Sponsoring Workgroup(s) (if applicable) (select all that have expressed interest and all those who may be interested), US Realm (if applicable), Management Groups (all applicable for relevant standards), and Steering Division of the Sponsoring Workgroup. 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 Review" to begin the Review Process. NOTE: Until this point you can make changes without notifications being sent out. Once you select "Start Review" any affiliated groups that you have selected will be notified.

Note: The approval of the Sponsoring Work Group will done as the first step in the Review Process (see [How to Review a PSS PILOT v2](#))

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

