

How to Review a PSS PILOT v2

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Process Overview

The PSS Approval Process begins after a PSS page has been created in Confluence and a Project Scope Statement Issue has been created in JIRA. Those steps are outlined here: [Creating a PSS](#)

Once this process begins, a notification scheme is enabled that emails Approval Groups (sponsoring workgroups, co-sponsoring workgroups, management groups, steering divisions, TSC) at appropriate times through the approval process.

It is important to note that upon receiving a notification that your group's approval is requested, that you understand how the Project Scope Statement in JIRA is setup.

The PSS Approval process is composed from two workflows:

- that of the PSS itself (Parent issue), and
- that of the reviewing groups (sub-tasks of Parent issue).

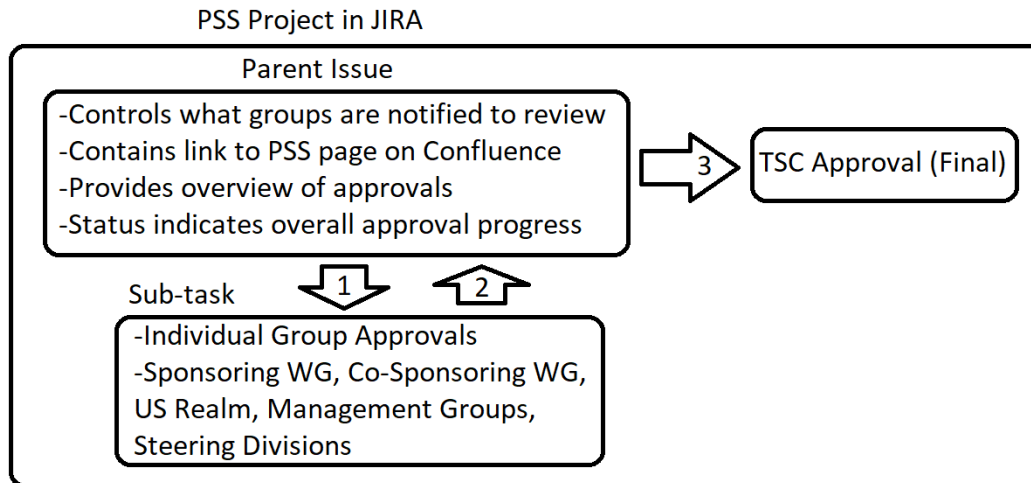
The relationship between these two workflows are parent to sub-task respectively.

All of the group approvals, minus the final Technical Steering Committee (TSC) review/approval, happen as sub-tasks of the Parent Issue.

The approval process is automated - after you cast your group's approval, no further action is required to further the process.

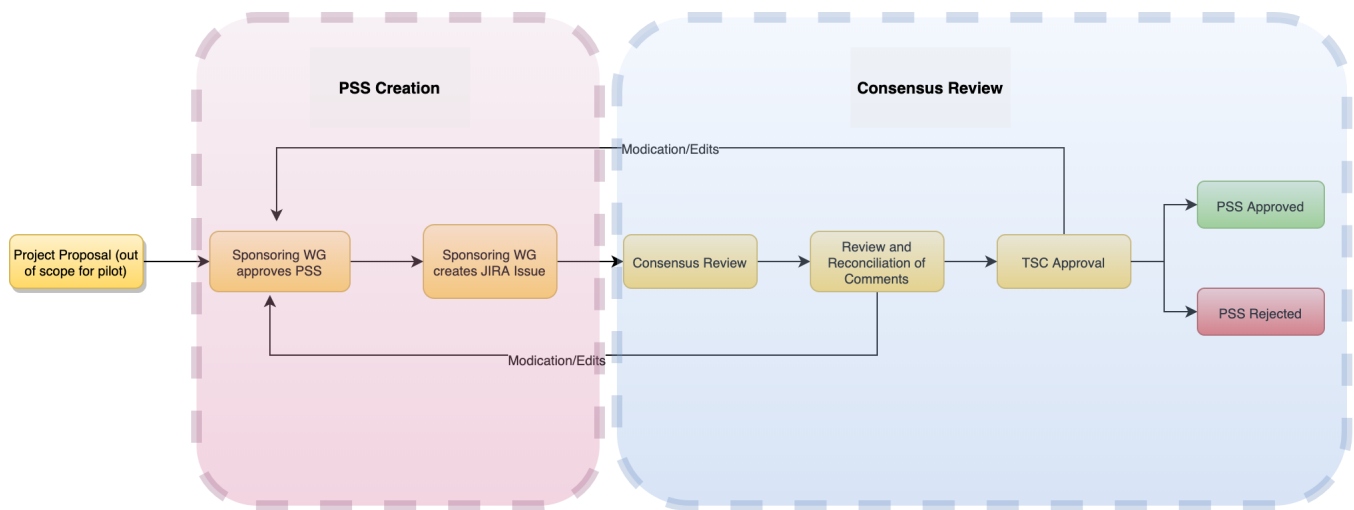
Once all approvals are completed, any comments must be reconciled and responded to.

The TSC will do the final review and approval.



Process Flow

This process covers the Consensus Review of this flow.



Quick Reference

1. Review the parent issue in JIRA by following the link in the email (Step-by-Step guide - Step 1)
2. Review the issue and PSS (Step-by-Step guide - Step 2-3)
3. Complete review by your group (Step-by-Step guide - Step 4-6)
4. Reconcile and resolve comments (Step-by-Step guide - Step 7)
5. TSC review and approval (Step-by-Step guide - Step 8)

Step by Step Guide

1. Follow link in email to parent issue in JIRA. NOTE: If you are a part of multiple work groups, make sure to note what group is being requested to review.
2. Review the issue
NOTE: The first step in the process is for the Sponsoring Work Group to approve. Once this is completed, notifications will be sent to all other groups identified in the Project Scope Statement.

Project Scope Statement / PSS-1147
Definitive HL7 V2 - HL7 FHIR Mapping

Project Scope Statement, Priority: Medium, Status: Draft, Resolution: Done

Sponsoring Work Group: Orders & Observations

Co-Sponsoring Work Group: Clinical Genomics, Conformance, Financial Management, Modeling & Methodology, ...

Management Group: DHR Management Group, V2 Management Group

Steering Division: Administrative Steering Division

Description: PSS used for pre-pilot testing of approval workflow

Issue Links: mentioned in 2-7p-FHIR - work flow testing

Sub-Tasks: 1. Clinical Genomics (Review), 2. Conformance (Review)

3. Review the PSS on Confluence using link.
4. Navigate to the "Sub-Tasks" section of the PSS issue.
5. Select your Group

Sub-Tasks Progress + ...

1. <input checked="" type="checkbox"/> Clinical Genomics	<input checked="" type="checkbox"/> REVIEW
2. <input checked="" type="checkbox"/> Conformance	<input checked="" type="checkbox"/> REVIEW
3. <input checked="" type="checkbox"/> Financial Management	<input checked="" type="checkbox"/> REVIEW
4. <input checked="" type="checkbox"/> Modeling & Methodology	<input checked="" type="checkbox"/> REVIEW
5. <input checked="" type="checkbox"/> Patient Administration	<input checked="" type="checkbox"/> REVIEW
6. <input checked="" type="checkbox"/> Patient Care	<input checked="" type="checkbox"/> REVIEW
7. <input checked="" type="checkbox"/> Pharmacy	<input checked="" type="checkbox"/> REVIEW
8. <input checked="" type="checkbox"/> Public Health	<input checked="" type="checkbox"/> REVIEW
9. <input checked="" type="checkbox"/> Service Oriented Architecture	<input checked="" type="checkbox"/> REVIEW
10. <input checked="" type="checkbox"/> FHIR Management Group	<input checked="" type="checkbox"/> REVIEW
11. <input checked="" type="checkbox"/> Administrative Steering Division	<input checked="" type="checkbox"/> REVIEW
12. <input checked="" type="checkbox"/> Architecture Review Board	<input checked="" type="checkbox"/> OPT-OUT

**Find your group here.
Select the name to
navigate to that sub-task**

6. While at the Sub-Task for your group's approval you may make comments, add attachments, and approve or reject.

Project Scope Statement / PSS-1147 Definitive HL7 V2 - HL7 FHIR Mapping / PSS-1160

Administrative Steering Division ← Your Group's Name

Details

Type: PSS Approval Status: REVIEW (View Workflow)

Labels: None Resolution: Done

Steering Division: Administrative Steering Division

Description

joshua@hl7.org, dhamill@hl7.org

Attachments

Drop files to attach, or browse.

Activity

All Comments History Activity Transitions

There are no comments yet on this issue.

**Casting your group's
approval or rejection**

- a. Agree: This choice will be reflected in the Parent Issue and the approval process will carry on.
- b. Disagree: This choice will be reflected in the Parent Issue and the sponsoring work group will be notified. A reason for rejection will be required.
- c. Opt-Out: Should your group feel it doesn't need to take part in the approval, select this option. No further action required; approval process will carry on.

7. Reviewing and reconciling comments

- a. If a group rejects the PSS, the sponsoring workgroup will be notified by email the name of the rejecting group with a link to the issue.
- b. Once the noted changes for rejections have been corrected, you will transition the sub-task back to "Review" using the transition button on the applicable sub-task.
- c. The original group which rejected will be notified and provided a link.
- d. They will navigate back and review. If sufficient changes have been made, they will approve this sub-task and the approval process will carry on.
- e. This process can happen multiple times until it is finally approved.
- f. Adding Reviewing Groups - The sponsoring work group can also add reviewing groups to the PSS

i. Select "edit", add additional groups from list and update

The screenshot shows a project issue page for 'Administrative Steering Division'. At the top, there are navigation buttons: Edit, Comment, Assign, More, Approve, Reject, and Admin. A red arrow points to the 'Administrative Steering Division' title with the text 'Your Group's Name'. Below the title, there are sections for Details, Description, Attachments, Activity, and Sub-Tasks. The Sub-Tasks section contains a list of 12 items, each with a 'REVIEW' button. A red arrow points to the 'Pharmacy' sub-task with the text 'Find your group here. Select the name to navigate to that sub-task'. Another red arrow points to the 'Approve' button with the text 'Casting your group's approval or rejection'.

g. Notifying a group who has already previously reviewed they must take another look:

The screenshot shows a project issue page with a context menu open over the 'Pharmacy' sub-task. The context menu options are: View Issue, Ready for Review, Edit, Assign, Assign to me, Comment, Attach files, Watch issue, Watchers, Convert to Issue, Create linked issue, Move, Link, and Clone. Three red arrows with annotations point to specific elements: 1. '1. Identify the previously reviewing group who needs to see this again' points to the 'Pharmacy' sub-task. 2. '2. Select Ellipsis on their row' points to the three-dot menu icon on the right of the 'Pharmacy' row. 3. '3. Select "Ready for Review" + ' points to the 'Ready for Review' option in the context menu.

8. Once Sponsoring WorkGroups, Co-Sponsoring WorkGroups, US Realm, Management Groups, and Steering Divisions have completed their review, the Parent issue will be transitioned to TSC Review.

a. At TSC Review, the TSC will be notified via email just like the other groups, however they will be interacting with the parent issue rather than sub-task type.

b. Options for the TSC Review include:

- i. Approve: PSS is considered Approved. Email is sent to Sponsoring WorkGroup
- ii. Add additional groups to review/ signify a previously reviewing group must take another pass: Parent issue is transitioned back to the Consensus-Review state and applicable group is notified.
- iii. Reject: PSS is considered Not Valid and will not become a project. (Rare)