How to Guide for Balloting using Jira

NOTE: This page is underdevelopment

Process Overview

This page provides step-by-step instructions for voting at HL7. The majority of voters will start the process using the HL7 Balloting Dashboard in Jira.

The following diagrams describes at a high level, the overall process for Voting.

For more information about the overall process, see Jira Ballot Process.
Set up HL7 Balloting Dashboard as a Favorite

If you have not done this previously, you should set the HL7 Balloting Dashboard as one of your favorites.

1. Log into Jira using your user name and password
2. Click on Dashboards in Menu Bar
3. Click on Manage Dashboards
4. Click “Popular” to open a list of Popular Dashboards
5. Click on the open star beside “HL7 Balloting Dashboard” to make it a favourite. This will add the dashboard to the dropdown list under Dashboards
6. Now when you click on Dashboards, the “HL7 Balloting Dashboard” will appear in the dropdown.

Process Flow
Quick Reference

Step-by-Step Guide - Ballot Signup

Voting on candidate standards and documents is available to both members and non-members of HL7. The Ballot Desktop is used to sign up to vote in a Ballot Cycle.

For more information on signing up for a ballot, see: http://www.hl7.org/participate/onlineballoting.cfm?ref=nav

Step-by-Step Guide - Submit Overall Vote on a Specification

If you wish to submit an overall vote - either Affirmative or Abstain for a specification, you can select the ballot from the HL7 Balloting Dashboard. To submit specific comments for a ballot or to vote negative, you must submit a Jira Issue in the appropriate Specification Feedback Project (FHIR, CDA, V2 or Other) for the specification. See Step-by-Step Guide - Submit specific issue on a Specification and Vote

1. From the HL7 Balloting Dashboard, select the ballot to vote on from the "My Current Ballots" section by clicking on the "Summary" link
   a. All ballots that the voter has registered for and that are open for voting will appear in this section
   b. If you have not voted on a ballot, the summary will show "No Vote"
   c. If you have voted, the summary will show your vote - Affirmative, Negative or Abstain

2. From the Ballot Submission Issue, you can choose to vote "Affirmative" or "Abstain"
   a. If you are part of an organization that has multiple voters, you will have the option to "Link Vote" - See Step-by-Step Guide - Vote "Same As"
   b. NOTE: it is not possible to link to another user if you are not part of the same organization or if that voter has not submitted a vote yet.
3. Click on either “Affirmative” or “Abstain”

   a. Affirmative Vote
      i. When you click “Affirmative” an information box will be displayed - you must review the information and then click “Affirmative” or Cancel

      Affirmative

      Ballot Submission - Affirmative
      This will set your ballot status to Affirmative, meaning you have read and understood this specification and agree that it is appropriate to publish it, even if any changes you’ve proposed are not applied. This vote will still keep you in the ballot pool for subsequent ballot cycles of this specification release.
      This vote can still be changed prior to the close of the ballot period. It will automatically change if you submit any negative vote comments tied to this ballot on the relevant specification feedback tracker.
      Once the ballot period has closed, the vote will be “locked in” and can no longer be changed except to withdraw negative votes.

      b. Abstain Vote
i. When you click "Abstain" an information box will be displayed - you must review the information and then click "Abstain" or Cancel

4. Once you have voted, you can change your vote at any time before the ballot closes to:
   a. "Abstain" or "No Vote" from Affirmative, or
   b. "Affirmative" or "No Vote" from Abstain

5. Click on the appropriate button to change your vote

Step-by-Step Guide - Submit specific issue on a Specification and Vote

Jira Balloting supports the creation of issues against specifications using the Specification Feedback Projects for:

- FHIR
- CDA
- V2
- Other (includes EHR-s Functional Models and Profiles, DAMS, V3 messaging specifications, Arden Syntax, etc)

When you create an issue for a specification that is in an open ballot, you will have the option to vote "Affirmative" or "Negative" on the issue. This replaces the need to submit commits using a Ballot Spreadsheet. If you wish to continue using a spreadsheet to submit comments, you will need to import the spreadsheet to JIRA including cleaning up all of the QA issues to ensure the spreadsheet is imported. See Vote by importing a Spreadsheet
1. Click "Create" from the HL7 Balloting Dashboard

2. Select the appropriate Feedback Specification Project in the "Project" dropdown.

- The following projects are relevant to balloting:
  - FHIR Specification Feedback
  - V2 Specification Feedback
  - CDA Specification Feedback
  - Other Specification Feedback

3. Fill in the required information for the issue. The following field are mandatory:
   a. Project
   b. Issue Type - Change Request, Technical Correction, Question, Comment
   c. Specification
   d. Summary
   e. At least one Related Artifact or Related Page

4. Click "Create"

5. Once you have created your issue, navigate to the issue by clicking the link in the information box that appears when your issue is created

6. From the issue, you will be able to vote. Depending on the type of issue created - Change Request, Technical Correction, Question or Comment, different options for voting are available
   a. Change Request - Vote Affirmative or Vote Negative
6. Technical Correction - Vote Affirmative

- b. Technical Correction - Vote Affirmative

- c. Question - Vote Affirmative

- d. Comment - Vote Affirmative

7. Click on the appropriate Vote button
8. Vote Affirmative
   a. A dialogue box will be displayed
      i. Selected Ballot - there may be multiple ballots that are applicable to the comment, for example, if the artifact selected for the issue is included in multiple ballots.
1. Choose the appropriate ballot to attach your vote to - the dropdown will include both the description and the code for the ballot

ii. Review the information

iii. Click Vote Affirmative

9. Vote Negative - only available for Change Requests
   a. A dialogue box will be displayed
      i. Selected Ballot - there may be multiple ballots that are applicable to the comment, for example, if the artifact selected for the issue is included in multiple ballots. The dropdown will include both the description and the code for the ballot

1. Choose the appropriate ballot to attach your vote to

ii. Review the information
Step-by-Step Guide - Vote "Same As"

If you are part of an organization with registered voters, you will have the option to vote the "same as" another voter from the same organization if:

- the key voter has submitted a vote on the same ballot in the cycle - can be "abstain" or "affirmative" or "negative" (NOTE: the key voter may change their vote before the ballot closes)
- the organization of the voters matches

When a voter links to another voter, the overall vote and any votes on specific issues from the key voter will be cloned to all of the linked voters when the ballot closes.

To link the vote for a specific ballot:

1. Select the ballot from the Ballot Desktop

2. Choose "Link Vote"

3. An information box will be displayed,
   a. Review the information
   b. Select the appropriate ballot submission for the key voter you wish to link to from the "Vote Same As" box
      i. NOTE: if you see "No Results" displayed, the key voter has not submitted a vote yet
Click "Link Vote"

Step-by-Step Guide - Vote by importing a Spreadsheet

See Importing ballot results from spreadsheets for more information and best practices when submitting spreadsheets as part of the ballot.

Step-by-Step Guide - Creating a Reconciliation Spreadsheet

Part of the ballot process at HL7 is the uploading of a reconciliation spreadsheet and the request to retract or withdraw negatives to the Ballot Desktop. This is done by a co-chair of the sponsoring Work Group once reconciliation is complete. The steps to do this in Jira are as follows:

1. Perform a search in the Ballot Definition Project <insert link> and find the particular ballot you want a reconciliation sheet for.

   ![Search in Ballot Definition Project]

2. Click on the "Reconciliation Spreadsheet" button. The Reconciliation spreadsheet will be generated and attached to the ballot definition.

   ![Reconciliation Spreadsheet]

3. Download the attached file. (If there is more than one, download the most recent.)

4. Upload that file to the ballot desktop.