How to Review a Project Scope Statement in Jira

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 and 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 set up.

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 PSS will remain open for comments for 4 weeks after which it will transition to TSC Approval automatically.

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. Use the link in the 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. OR go to https://confluence.hl7.org/display/PSS and select the PSS that your group has not reviewed (with status of Consensus Review). You can filter this list by status or words in the Summary field to help you find PSS of interest.
2. Click on the link to open the issue.
3. 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.

4. Review the PSS on Confluence using link.
5. Navigate to the "Sub-Tasks" section of the PSS issue.
6. Select your Group - if your group is identified in the PSS, a sub-task will be automatically created for you. Add your comments to this sub-task. Do not add a general comment to the parent issue itself.

7. If your group was not identified in the PSS but you wish to add a comment, click "COMMENT" at the bottom of the parent issue and add your comment.

8. If your group wishes to become a co-sponsor of the project, click "EDIT" and go to the "Co-sponsoring Work Groups" section - add your Work Group to the list and click "UPDATE".

9. While at the Sub-Task for your group's approval you may make comments, add attachments, and approve or reject. When recording the decision of the group, include the link to the minutes where the decision was made.

   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.

   i. If the Sponsoring Work Group opts out, the Project Team will have a few options to resolve:
      1. Work with the identified sponsoring Work Group to resolve the issues that have been identified
      2. Identify a new sponsoring Work Group that will accept and approve the project
      3. Close the PSS
4. Escalate to the TSC
   a. If you have attachments to add to the PSS, do not include the attachment, but instead include a link to the attached document in the description or project need section.

12. 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

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

14. Once Sponsoring WorkGroups, Co-Sponsoring WorkGroups, US Realm, Management Groups, External Review, External Terminology and PBS metrics have completed their review AND four weeks has passed since the issue moved to “Consensus Review”, the Parent issue will be transitioned to TSC Review.
   a. NOTE: The PSS will not transition to TSC Review if the Project Repository is not populated
   b. 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.
   c. Options for the TSC Review include:
      i. Seek additional clarification from Project Team and/or Sponsoring Work Group - this will be done via email
      ii. Approve: PSS is considered Approved. Email is sent to Sponsoring WorkGroup
      iii. Reject: PSS is considered Not Valid and will not become a project. (Rare)