2021-03-02 FM Interim Meeting

Chair: @Paul Knapp  Scribe:

Call Logistics:

This call is at 11 AM ET, 10 AM CT, 9 AM MT, 8 AM PT
Join Zoom Meeting https://us02web.zoom.us/j/82031005986 Passcode: 098894

Financial Management Work Group is inviting you to a scheduled Zoom meeting.

Topic: FM Full WG Weekly Conference Call
Time: Oct 20, 2020 11:00 AM Eastern Time (US and Canada)
Every week on Tue, until Jan 12, 2021, 13 occurrence(s)
Join Zoom Meeting https://us02web.zoom.us/j/82031005986 Passcode: 098894

One tap mobile
+16699006833,,82031005986# US (San Jose)
+12532158782,,82031005986# US (Tacoma)

Find your local number: https://us02web.zoom.us/u/kfWlHSVu3

Attendees - list maintained at the bottom of the meeting notes

FAqs -

- PSS approval flow: Sponsoring WG, Co-sponsors, US Realm, Management Groups, Steering Division, TSC
- UTG Process: https://confluence.hl7.org/display/VOC/UTG+Submitter+Documentation
- US CORE Variance: US Core Variance Request Process
- FM - Ballot Reconciliation Resources: FM - Ballot Reconciliation Resources
  - Started a new confluence page to list all ballot reconciliation resources. If anyone has any that are not listed there, please update and let the rest of us know!!!
- Steps for STU-1 publication:
  - Ballot Reconciliation - https://confluence.hl7.org/display/FHIR/G-+Ballot+Specification+and+Reconciliation
  - Publication Request - https://confluence.hl7.org/display/FHIR/H++Publication+Request
    - Approval by Sponsoring WG
    - Approval by FMG
    - Enough positive votes?
    - All errors resolved on in FHIR IG?
  - Submit Checklist
  - Approval by TSC
  - Work with Lynn to publish
- FHIR IG numbering
  - The HL7 version naming convention is: v.b.r
  - v = published version number. Pre-publication v = 0, STU1 = 1, etc.
  - b = ballot number for this version. balloted 1 time b = 1, etc.
  - r = revision number. The IG team can use this as they wish.
- ID vs. IDENTIFIER: ID - Local to the resource creator, IDENTIFIER - an identifier everyone recognizes. Independent of where the information is created or by whom

<table>
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<tr>
<th>Agenda Outline</th>
<th>Agenda Item</th>
<th>Meeting Minutes from Discussion</th>
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| "Agenda in Brief" details follow | Review agenda -
  - Review/Approve 2/23/2021 Interim Meeting Minutes
  - Announcements
  - Insurance Plan/Coverage Discussion - No policy resource
  - New PSS Review/Vocabulary Votes - UP-160 POA
  - Zulip Streams that need responses - Corey Spears Directed to Pat & MK
  - R5 Work - review list and vote
  - CARIN4BB - Questions (STU2/TC - which is which) - Timeboxed to 15 minutes | Next week 3/9:
  - Da Vinci update on the Patient Cost Transparency use case

ADD Josh Lamb Payer to Member visual

Move Insurance Plan/Coverage Discussion to after PSS/Vocab

Request for next meeting:

Request for an agenda item for the next call. Can we discuss the trouble mapping x12 elements to claim?

I would like to understand better what Paul is describing when he says 'X12 Claims support expressing billable items at both the header (patient) and service (line item level).'

|---------------------|--------------------------------------------------------|--------------------------------------------------------|
| **ANNOUNCEMENTS**   | Reminder - Updated Confluence pages:
  - HL7 Essentials page
  - HL7 Leadership Announcements page
  - https://confluence.hl7.org/display/HDH (Documentation and Help) page
  - R4B ballot info: lloyd@lmckenzie.com to cochairs@lists.hl7.org
  - Hi everyone, | Calls:
  - The Gender Harmony Project - Vocabulary WG EOW
  - KSA regular weekly calls will be 1-3 AM ET Thursday
  - Accounts, Payments, and Statements at 1pm ET Thursday
  - FMWG R5 & Vocabulary working call - Thursday 2pm

**See HL7 Conference Call Center for Da Vinci Calls**
FMG has shifted the ballot opening for R4B to Mar. 5 from Feb. 19. Any work groups with content slated for R4B, please see the post in committers/announce for details on content deadlines, etc. Discussion on committe rs

- Timing of R5 ballots: (see https://www.hl7.org/fhir/versions.html)

lloyd@lmckenzie.com to cochairs@lists.hl7.org

One last message for today:

The FMG would like to hear from all work groups that fall into one or more of the following categories:

- have existing normative content they expect to update in R5
- STU content moving to normative in R5
- STU or net new content where they are seeking review to answer targeted questions to allow finalization of design in advance of the R5 ballots

We would like to hear a confirmation of exactly what content you have that fits into one of the above categories and confirmation that your content will be committed and clean and ready for QA by Mar. 30. (That's 48 days from now, so less than 7 weeks.)

For everyone else, please start work on getting approved changes applied and committed. As of today, there are 1268 change requests against the core specification. There are an additional 1097 items that haven't yet been resolved. 400 of those haven't been updated in the last year. We should be aiming to get both of those counts into the low 100s across HL7 as a whole and low 10s for each work group.

You might find this dashboard helpful: https://jira.hl7.org/secure/Dashboard.jspa?selectPageId=12005#

Note that the target 'freeze' date for R5 is around mid-July, 2021. That'll come up sooner than we'd all like, so please put your plans in place to start whittling down these numbers soon.

**Monthly Reminders to Co-Chairs:**

Also, please review the following pages on Confluence:

- **Normative ANSI Standards approaching expiration**
  2021 03 02 - FM has none
  https://confluence.hl7.org/display/HL7/ANSI+Standards+approaching+expiration

- **STUs Expiring in the Next 6 Months**
  2021 03 02 - FM has none
  https://confluence.hl7.org/display/HL7/STUs+Expiring+in+Next+6+Months

- **Upcoming PSS and NIB Deadline Dates for Future Ballot Cycles**
  All deadline dates can be seen on the new Balloting, Content Submission, Voting, and Working Group Meeting Schedules on Confluence at:
  https://confluence.hl7.org/display/HL7/HL7+Calendars

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<td>Submit Work Group Approved PSS to the PMO. Failure to meet this deadline results in the need for the Project Facilitator to submit an appeal to the TSC. To submit an appeal, email <a href="mailto:tscpm@HL7.org">tscpm@HL7.org</a>; include the PSS and a detailed rationale why your project must be included in the ballot cycle despite missing the deadline.</td>
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<td>TBD</td>
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### New PSS Review

Instructions for how to review a project proposal are available here: [https://confluence.hl7.org/display/HL7/How+to+Create+and+Review+a+Project+Proposal#HowtoCreateandReviewaProjectProposal-Step-by-StepGuide-ReviewingaProjectProposal](https://confluence.hl7.org/display/HL7/How+to+Create+and+Review+a+Project+Proposal#HowtoCreateandReviewaProjectProposal-Step-by-StepGuide-ReviewingaProjectProposal).

Please consider the following in your review:
- Does this project fit into my Group's Mission and Charter and should we be a sponsor, co-sponsor or an interested party?
- Is there an ongoing project(s) in my Work Group that are similar to this one that may overlap? If so, provide details in your comment.
- Is there a project(s) underway in other Groups that are similar to this one that may overlap? If so, provide details in your comment.
- Are you aware of a project(s) outside of HL7 that may overlap with this project?
- What other Work Groups should be considered as co-sponsors or interested parties?

### FM Zulip Streams to Discuss

2021/03/02:

[https://chat.fhir.org/#narrow/stream/204607-CARIN-IG.20for.2C20related.20claim.20reference](https://chat.fhir.org/#narrow/stream/204607-CARIN-IG.20for.2C20related.20claim.20reference)

Related Claim - can provide the business identifier of the prior the relationship to the other claim.

*** Add JIRA Ticket to discuss and we need to expand description.

[https://chat.fhir.org/#narrow/stream/204607-CARIN-IG.20for.2C20Origin](https://chat.fhir.org/#narrow/stream/204607-CARIN-IG.20for.2C20Origin)

FM agrees with the threads and we will discuss the UTG process.

### Vocabulary

**AHA, AMA, CMS, NCPDP, X12**

- Register Code systems and value sets for use across implementation guides.
- How do we do this across all IGs using the same code systems and value sets?
- Register them in the UTG

2021/03/02 -

- Check voting, some confusion over open JIRA tickets that
R5 Discussion

**may want to create at US CORE Insurance Plan Profile.**

**US CORE Coverage Profile - now or after R5**

This needs to be added to future call for the full workgroup.

2020 12 29:

- JIRA Tickets for completed IGs, Duplicates are appearing how to eliminate them from the filter
- Need email to Lloyd for help, done 1/5/2021.
- Filter = "Work Group" = "Financial Mgmt [fm]" AND status ORDER BY cf[11302] ASC

2020 01 12

- Awaiting feedback from Llloyd

03/02/2021: HOMEWORK

***Question to group, do we need to add purchased services and their cost amount? Can this not be addressed with the existing 3-tier structure and Take to larger FM work group.

Purchased services are: 1 Provider takes the X-Ray a 2nd prov. shows on the claim the ‘purchased services amount’. (special c invoice along with the claim.) Purchased services are an edge case

2020 01 12

Awaiting feedback from LLoyd

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CARIN

Timeboxed to 15 minutes.

2021 03 02:

FHIR-31062 - Dates Backbone

Motion to Approve Andy/Mark Scrimshire. 16-0-0

Question: Why is a vision profile being created? What is differ professional/dme profile?

2021/03/02: There is no intent to create a vision profile at this to allow Claim Type of Vision. Not all payers separate out claim professional claim.

FHIR-31384. NUBC Code. Not a technical correction. Needs tc JIRA Tickets that need to be balloted by the FMWG.

PPT shared with accelerators:

2021-01-12 FHIR Accelerator Coordination Teleconference

Question /Guidance on coding dental.

ADA claim form allows multiple teeth numbers per claim line. "\Type. Tooth Surface. Pat will send out email and Co-Chairs will

Email sent to Co-chairs with question.

ADA American Dental Association

Dental Claim Form

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Need a JIRA Ticket to make a change to bodySite. 0..*
### 1) Extensions across profiles: Modeling and Methodology (MnM)

- 5/12/2020: proposal fell apart at MnM - next call today, 5pm ET
- 6/2/2020: Next MnM call 6/9/2020
- 6/30/2020: Next MnM call 7/7/2020
- 9/15/2020: the registry helps, Paul took to US Realm

### 2) Common Profiles/Common Extensions

- **TO DO:** start building out a list of FM specific profiles registry until one is created for all HL7 Profiles (easy search and find)
- For DV the common profiles are being put into HRex. Will that need to change in the future?
- There are standard profiles and extensions that are currently in the FHIR specification. BUT, not all IG level profiles and extensions are there. Creating a common instance should make things easier. Create a common repository.

### 3) FM to do: Need to put together a list of identifiers that are used in claims and EOBs to include how to match the 2

### 4) FM voting. Using Yes/No/Raised Hand vs. Polling for ballots

- Working on documentation before rolling out.

### 5) Conformance vs. Compliance, Created page: [Conformance vs Compliance Discussion](https://confluence.hl7.org/display/HL7/Configuring+Specification+Feedback)

- **Conformance vs. Compliance.** HL7 needs better operational guidance on the use of the conformance verbs between actors and business. (see Paul and Bob)
  - Health Plans **SHOULD** accept and retain Provenance records in
  - blurs the lines between business and system guidance
  - **FM needs to go back** to Conformance WG (CWG feels that compliance is out of scope). Kathleen brought up to the Policy Advisory Committee aka PAC. They will be looking at next month.
  - **2021 01 12:** Conformance vs. Compliance
    - Bob, for Da Vinci, taking to TSC to discuss. using implementation conformance verbs.

### 6) Balloting Education. How to complete spreadsheets to be uploaded in JIRA

See Kathleen for a list of items that are causing issues in uploading to JIRA. Need to do walk thru

**Commenter Ballot Spreadsheet Instructions**

- Use exact JIRA Account name and email address
- In Column D “Section” use the TOC enumeration
- Negative Comments entered in Column K must select “Correction” as Sub-category in Column L
- Any Affirmative Comments in Column K must select applicable Sub-category, i.e., A-Q (affirmative question) and A-T (affirmative typo) are “Clarifications”, while most A-C (affirmative comment), A-S (affirmative suggestion) are “Enhancements”. No Sub-category required for A-A (affirmative w/o qualification)

| **Erratta vs. STU Update** | Technical Corrections approval by TSC: 2020-02-24 TSC Agenda /Minutes - Technical Steering Committee - Confluence (hl7.org)  
**HL7 Essentials**  
**Definition:** Errata, Technical Correction  
**Errata and ‘technical corrections’**  
**Word document:** http://gforge.hl7.org/gf/download/docmanfileversion/7482/10824/Guidance-to-Work-Groups-on-DSTU-Updates20130819.docx  
**Proposed Policy for Breaking Changes - FHIR Management Group - Confluence (hl7.org)** | Left here for background, if needed |
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| **Payer Identifiers**  
Identifiers that are used to identify a Payer |  
**2020 03 03:** Kathleen, research has been done. Needs V2 CR. V2 - Kathleen/Donna work, any updates or discussion needed? KC - RE: Clarify IN1-36 & 49, IN2-61 Member ID. **Analysis done, guidance drafted. Just need to create V2 CR to add guidance and have WG approve to submit.**  
See: V2 Identifiers  
Needs to be a CR for V2 | There are identifiers that are issued by Payers. Things like member covered within the Coverage Resource. (Member id - Coverage ID). Other identifiers go in class.  
Two conversations going on: how do we identify a payer. There is not a consistent way to identify a payer in the US. There is no 'authority' that creates an "NPI" for a payer |
| **Account, Payment and Statement Work Effort Update** | Invoice/Statement/Payment Work WG introduction to effort  
Look for emails/doodle polls for meeting times and dates.  
PfE WG will be included. | Calls on Thursday's. See FM Conference Call for details. |
| **Anesthesia Billing Support Update** | Update:  
**Meeting once a month. Next meeting:**  
***Documentation here:** [Anaesthesia Billing Support](http://example.com) (under documentation)  
***PSS:** [PSS for Anaesthesia Billing Support](http://example.com) | Preparing to create the V2 IG using the NIST tooling.  
4/17/2020 - Pause in effort |
The v2 Management Group is sponsoring a project to modernize the v2 base standard. We will have a January 2021 for-comment ballot item to gather feedback on the new on line presentation format for v2. As an authoring WG, we’d like to reach out to the FM WG and encourage folks to join the consensus group and provide comments. We’re also happy to join a WG call to describe the project.

- **FM Co-Chairs:** Need to assign a V2 publishing contact
  - Vassil may be interested in being the FM V2 Publisher
  - Follow-up with Vassil after the 1st of the year

 tracker #25203 to add use cases. see: V2 Identifiers

- https://gforge.hl7.org/gf/project/v2-ballot-pkg/tracker/?action=TrackerItemEdit&tracker_item_id=15542&start=0
  - Not applied (and maybe not yet finalized)

- tracker #25193 to update the IN2-25, IN2-26, and IN2-27 field definitions.

- Email thread is located at: V2 Questions - tracker #25203/#25193

Tracker: 15632: V2 GForge Ticket 15632 - PRT1:14 is broken

- https://gforge.hl7.org/gf/project/v2-ballot-pkg/tracker/?action=TrackerItemEdit&tracker_item_id=15632&start=25
  - Is there still a change to be made here? Should table 418 be removed from the segment definition table but retain the explanation box?

**BACKLOG**

Backlog rows have been moved to:

- Parking Lot - Things we need to address

**Backlog:**

- **FM DAM**
  - US DAM for FM
  - Co-chairs agree
  - Base it on v3 FICR DMIM


**Open Discussion**

Next Meeting: Next Tuesday.

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**Participants**

Meeting ID: 820 3100 5986  Topic: FM Full WG Weekly Conference Call  User Email: fm-cc@lists.hl7.org  Duration (Minutes): 140

Start Time: 2021-03-02 10:50:49 AM  End Time: 2021-03-02 01:09:50 PM  Participants: 34

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<td>Linda Michaelsen</td>
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<td>Patricia Taylor</td>
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