Jira Digital Health Interoperability Specification Feedback User Guide

Jira DHI Specification Feedback

General Guidance

The DHI Projects in Jira are a simplified version inspired by and aligned with the HL7 Jira Specification Feedback, providing a mechanism for capturing feedback about the DHI Specifications.

For more information explore the [HL7 Jira Specification Feedback](#) documentation.

Abbreviations / Glossary

DHI	Digital Health Interoperability
CR	Change Request
TC	Technical Correction

Note: Throughout this document, it is pointed out if certain information is applicable to only one issue type. Otherwise, if the specifics are omitted, it means that the statement is applicable to all issue types.

Prerequisites

To submit feedback, as per current procedures, you must register as a user on Infoway's InfoCentral, be an active member of a working group, and have granted access to the JIRA projects (approved by the working group lead).

o   To register on the InfoCentral website, go to: https://infocentral.infoway-inforoute.ca. Click on the Register link and follow the instructions to create an account.

o   Once registered in InfoCentral, and a working group, you can request access to Jira directly in a working group meeting, or via a forum post in the working group space.

o   To access Jira, go to: https://informs.infoway-inforoute.ca.

Projects

Generally, there is one project per specification. The initial list of DHI Projects that are currently defined are:

o   Patient Summaries
o   eReferral - eConsult
o   CA:FeX
o   CA Core+

More projects will be added as new specifications are created.

Issue Types

There are two issue types defined:

Change Request	Represents a request for change to the referenced specification. It will be resolved with a vote by the appropriate work group.
Technical Correction	Represents a minor change to the specification that does not impact the behavior of conformant applications. It includes corrections to spelling and grammar, errors

	with propagating name changes of elements within the specification and formatting issues. No voting is required, the issue will be approved automatically once verified.

Project Roles

Roles are defined to allow users to perform specific actions in the Jira DHI projects.

Note that roles apply to all DHI Projects, for example if a user has permission to edit issues in the Patient Summaries project, they also have permission to edit issues in the eReferral project (and all the other DHI projects).

| **Submitters**	Submitters have permissions to submit issues. This role is available for all Jira users.
Managers	Managers have permissions to manage issues. This includes, but is not limited to activities such as Edit, Triage, Propose Disposition, Approve, and Publish. This role is granted as needed, to Infoway and non-Infoway members, who are typically members of one or more Work Groups and manage specification input/feedback.
Administrators	Administrators have permissions to change additional fields, delete issues, perform bulk operations – e.g. edit/delete all comments, etc. This role is granted to Jira Administrators.

Issue Workflow

The Submission of a new issue (feedback item) initiates a process for review.

All DHI specification feedback issues are governed by a shared Workflow, that is a form of a state machine. The workflow defines the set of **states** and **transitions** that an issue can go through during its lifecycle.

Issue States

The issue **states** that are part of the workflow state machine are described below.
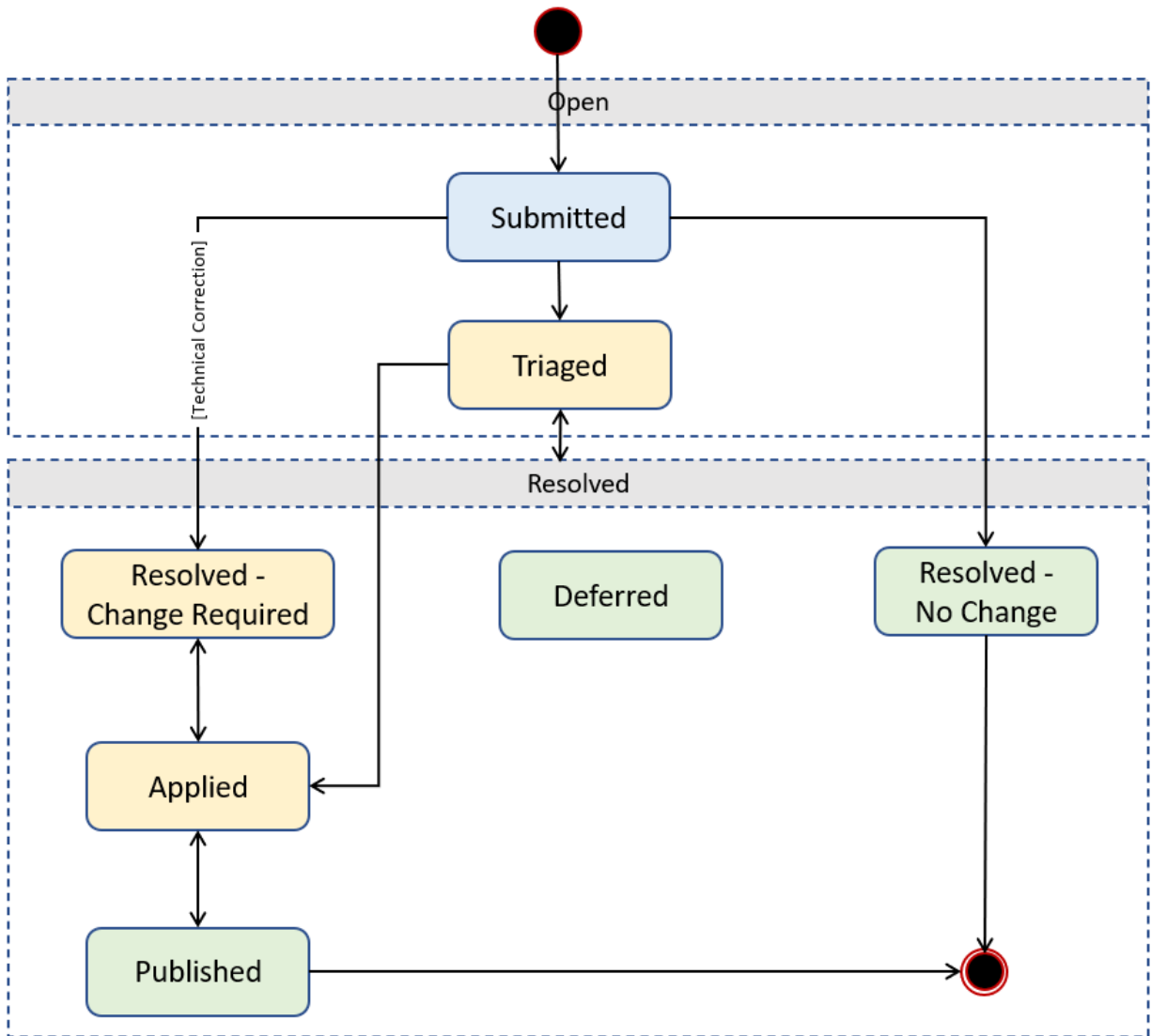
All issues will start out as Submitted (Blue) and will eventually end in one of the bottom states (Green). The issue states are grouped into two main categories as described below.

Open	The issue is submitted and has not yet been reviewed
Resolved	The issue has been reviewed, voted if applicable, and the recommended resolution is recorded

The following table provides a description of each state.

State	Description
Submitted	The initial state for all new feedback items. Work Groups generally don't look at items in the 'Submitted' state. Specific individuals with Manager role are responsible for checking the newly submitted items, correcting them if necessary and then transitioning them to Triaged state.
Triaged	The issue is ready for Work Groups to evaluate and make a decision on.

Resolved - Change Required	A change will be made to the specification based on this issue
Resolved - No change	No change to the specification will be made based on this issue. The reason could be that the submitter withdrew the item, the work group decided not to make any changes based on the issue, changes have been already made based on another issue that render the change unnecessary
Duplicate	This issue has been determined to be substantively the same as another issue within the same project. This issue will be linked to the duplicate issue, that has a resolution.
Deferred	No action will be taken against this issue for this release, but later on, after publishing of the specification, it will be returned to "Triaged"
Applied	The agreed change has been made to a draft version of the specification, but not yet included in an official release
Published	The agreed change has been included in a published version of the specification

Issue Transitions

The workflow defines **transitions** that moves the issue from one state (Current State) to another (Target State). Each transition is typically triggered by an **action** that is performed by a user. A user is allowed to perform specific actions depending on their associated role.

Issue Transitions for Submitters

The table below shows the Transitions available to users that are associated with the Submitter role.

Transition	Description
Edit	Users can edit their own issue prior to it being triaged
Close	Users close their own issue prior to it being actioned, referenced or balloted

The Transitions are moving the issue from a state to another as shown below:

Transition	Current State	Target State
Edit	Submitted	Submitted
Close	Submitted	Resolved - No change
Close	Triaged	Resolved - No change

Issue Transitions for Managers

The table below shows the Transitions available to users that are associated with the Manager role.

Transition	Issue Type	Description
Auto-approved		Change is approved without need for work group review
Triage		Issue has been reviewed and is properly categorized and ready for action

Propose Disposition		Fill in candidate resolution information without changing to resolved status or capturing vote information to allow for further work group review
Adjust Fields		Allow editing of information other than resolution-related elements
Will Update Spec	CR	Proposal has been reviewed and a change to the specification is needed
Will Fix	TC	Technical Correction has been reviewed and the requested change will be made
Approve Pre-applied Request	CR	A change previously made to the specification has now been approved
Approve Pre-applied Fix	TC	Pre-applied Technical Correction has been reviewed and the applied change has been approved
Reject Request	CR	The proposed change will not be made
Reject Fix	TC	The proposed technical correction has been deemed incorrect/unnecessary and no other action will be taken
Defer Request	CR	Postpone consideration of this issue to the next release
Defer Fix	TC	Postpone consideration of this issue to the next release
Change Applied		The requested change has been fully made to the specification and committed to the source
Published		A formal release containing the applied change has been published
Not Published		The change was marked as Published in error
Not Applied		The issue was marked as Applied in error
Re-open		Revisit the decision to not make a change
Adjust Grouping		Modify the grouping(s) associated with the request

The Actions/Transitions are moving the issue from a state to another as shown below:

Transition	Issue Type	Current State	Target State
Auto-approved	TC	Submitted	Resolved - Change Required
Triage		Submitted	Triaged
Propose Disposition		Submitted	Triaged
Propose Disposition		Triaged	Triaged
Adjust Fields		Triaged	Triaged
Will Update Spec	CR	Triaged	Resolved - Change Required
Will Fix	TC	Triaged	Resolved - Change Required
Approve Pre-Applied Request	CR	Triaged	Applied
Approve Pre-Applied Fix	TC	Triaged	Applied
Reject Request	CR	Triaged	Resolved - No change
Reject Fix	TC	Triaged	Resolved - No change
Defer Request	CR	Triaged	Deferred
Defer Fix	TC	Triaged	Deferred

Change Applied		Resolved - Change Required	Applied
Adjust Grouping		Resolved - Change Required	Resolved - Change Required
Re-open		Resolved - Change Required	Triaged
Adjust Grouping		Resolved - No change	Resolved - No change
Re-open		Resolved - No change	Triaged
Adjust Grouping		Deferred	Deferred
Re-open		Deferred	Triaged
Published		Applied	Published
Not Applied		Applied	Resolved - Change Required
Adjust Grouping		Applied	Applied
Not Published		Published	Applied
Adjust Grouping		Published	Published

Issue Transitions for Administrators

The table below shows the Transitions available to users that are associated with the Administrator role.

Transition	Description
Admin	Allow administrator to edit anything - excluding resolutions
AdminResolved	Allow administrator to edit anything - including resolutions

The Transitions are moving the issue from a state to another as shown below:

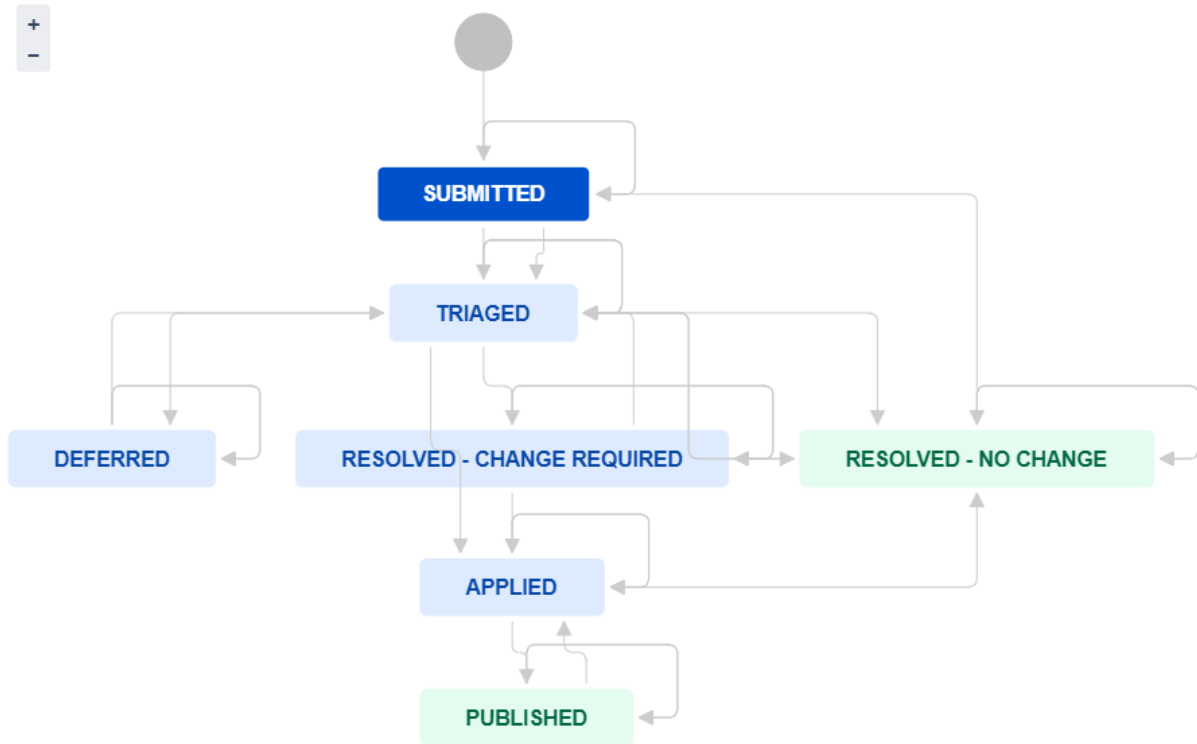| Transition	Current State	Target State
Admin	Submitted	Submitted
Admin	Triaged	Triaged
AdminResolved	Resolved - No change	Resolved - No change
AdminResolved	Resolved - Change Required	Resolved - Change Required
AdminResolved	Deferred	Deferred
AdminResolved	Applied	Applied
AdminResolved	Published	Published

Inspecting the Workflow

The workflow is available to be inspected on the View Issue screen. To do that, click on any issue in the project. On the screen, the state of the issue is displayed (e.g. **SUBMITTED**), and next to it a View Workflow link.

Click the View Workflow link to open a visual representation of the workflow in form of a diagram. Click the + and - buttons to zoom in and out of the diagram.

DT: Default Workflow

The current state of the issue is highlighted within the diagram. Hover over any state to display all possible transitions, according to your permissions. The transitions typically correspond to actions that a user can perform.

In the example below, the transitions are visible when hovering over the Triaged state.
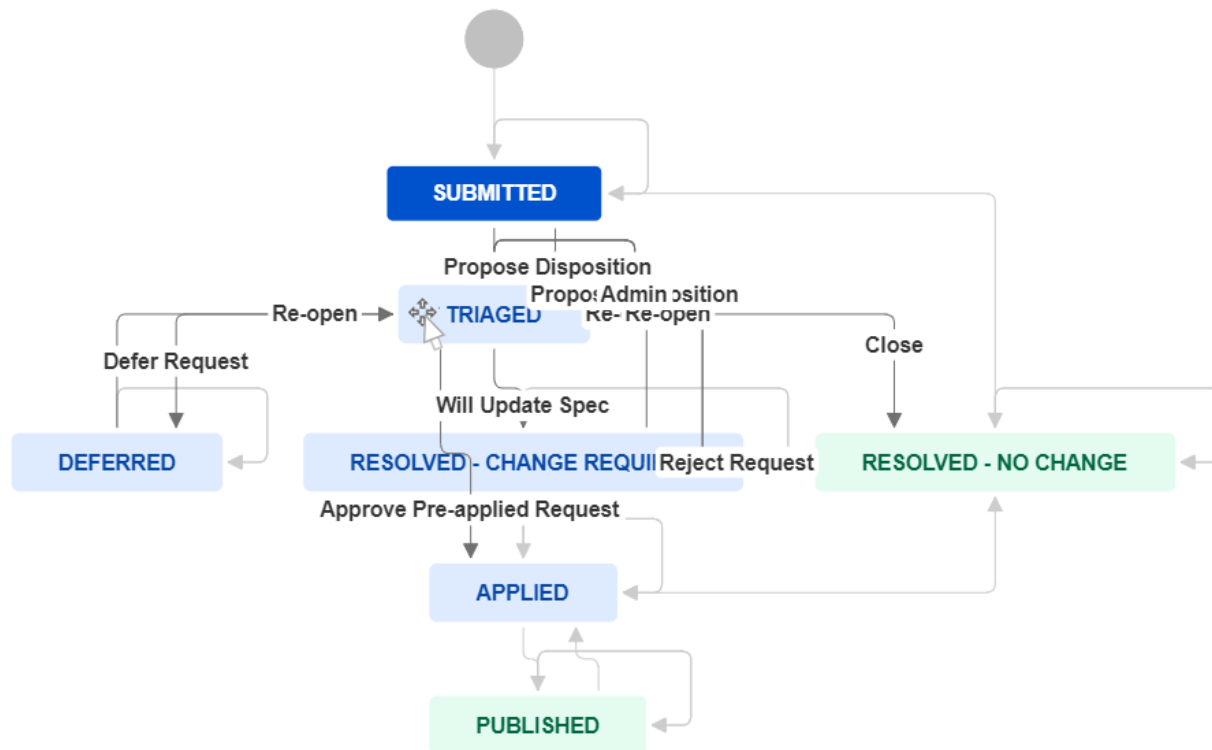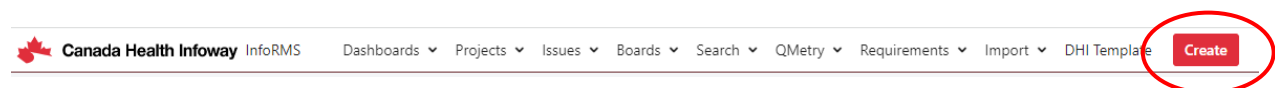
Interacting with Issues

In addition to the inherent features that come pre-built and provided by Jira, this guide places emphasis on the functionalities that are tailored specifically to the requirements of the projects associated with the DHI Specification Feedback.
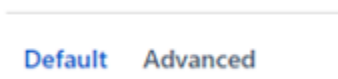
Submit new Feedback

Navigate to the project of choice and click the "Create" button.

This will open the Create Issue screen with suggested fields that should be filled in.

The screen has two tabs: **Default** and **Advanced**.

Ensure that the project and issue type selected are the correct ones.

Required fields are marked with an asterisk (*), however fill in as much info as possible on the Default tab and possibly on the Advanced tab. This will help to appropriately triage and resolve the issue in a timely manner.
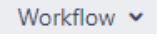
Workflow Actions

Most **actions** that are available to be performed on an issue fall under the category of "workflow" actions. They are generally corresponding to the **Issue Transitions** described in the Issue Workflow section.

For each action a button is displayed when viewing the issue on the View Issue screen.

The actions that are available depend on the state the issue is in, the role and permissions of the user, and other factors. Most actions move the issue from one state to another and often are requesting the user to fill in additional information on a separate screen.

Note: Jira will only display a limited number of actions on-screen. If more actions are possible, it will display a Workflow button ( ) that needs to be clicked to see additional actions. (So, if an action you would like to perform is not displayed on the screen, check to see if it's hiding under Workflow.)

Screens and Field Customizations

When moving an issue from one state to another, typically there are screens opening up that need to be filed in with additional information. The screens contain a combination of system fields (provided by Jira) and custom fields, that are specific to the DHI projects. Below is a description of the most important fields, focused on project specific customizations.

Field	Description
Work Group	The work group responsible for resolving the issue. (Leave blank if you're not sure.)
Raised in Version	The specification release that the feedback applies to.
Grouping	Ad-hoc categories associated with the issue. Used for filtering/prioritization. Retained after resolution.
Scheduling	Ad-hoc labels describing when the issue is intended to be discussed/progressed. (These are cleared once the issue is resolved)

Resolution	Specifies the reason or resolution status of a resolved issue. The following pre-defined values are available.
	o **Persuasive** - The proposed change will be made as suggested
	o **Persuasive with Modification** (CR only) - The proposed change will be made in spirit, but with minor adjustments to reflect committee agreement
	o **Not Persuasive** - The proposed change will not be made
	o **Not Persuasive with Modification** (CR only) - The proposed change will not be made, however a change will be made to the specification that may improve clarity or address the root cause of the proposal
	o **Considered for Future Use** - The proposed change will not be made now, but the issue will be reopened and re-considered as part of the next release
	o **Duplicate** - The issue is a duplicate of an existing issue
Resolution Description	The details of what action is being taken for a change proposal, the reason for not taking any action, the answer to a question or the acknowledgement of a comment.
Resolution Vote	Information about the vote by the responsible work group that decided on the resolution. Must be in the format **Mover / Seconder : For - Against - Abstain** (e.g. John Doe / Jane Doe: 3 - 0 - 2)
Vote Date	The date on which the current resolution for the item was voted. (This should be the date of the meeting in whose minutes the vote is recorded)
Change Category	Should be one of the following values.
	o **Clarification** - No functional change, but improvement in ease of understanding the specification;
	o **Correction** - Addresses a deficiency in the specification that prevents it from functioning as designed;
	o **Enhancement** - Adds additional capability to the specification
Change Impact	Should be one of the following values.
	o **Non-substantive** - Should not require code changes, though clarification of interpretation could result in code changes
	o **Compatible, Substantive** - Existing data is still valid, but code changes may be needed to support new data
	o **Non-compatible** - Existing data may not be valid against the new specification. Code changes and conversion effort required.
Pre Applied	If '**Yes**', indicates that the proposed change has been applied to the specification prior to official approval
Applied for Version	The version of the specification the change has been (or will be) applied to
Related URL	The URL of the page (or better yet the specific anchor of the section) the feedback relates to
Related Section(s)	Number or name of the section related to the issue. If multiple, separate with commas

Commenting on an Issue

All users can post comments against existing issues, regardless of who created the issue. These comments might provide additional information, use-cases, indicate agreement or disagreement, suggest alternatives or provide any other commentary intended to be useful to the work group in making their decision about how best to resolve the issue. Commenting is only allowed on "open" issues. Once an issue is resolved, only managers and administrators can make further comments.
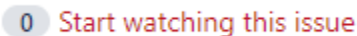
To make a new comment, press the Add Comment button on the View Issue screen.

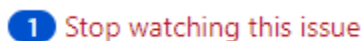Add comment

Watching an Issue

Users can add themselves as watchers of an issue, that allows receiving notification emails when the issue is changed in any way (edited, comments added, transitioned to a different state, etc.). The submitter of an issue is automatically added as a watcher.

To add (or remove) yourself as a watcher, click on the link beside the Watchers count or choose the option from the More menu.

Watchers: 0 Start watching this issue

Watchers: 1 Stop watching this issue

You can see who's watching an issue by clicking on the number that shows the count of watchers (1 in the example below).

1 Stop watching this issue

Resolving Triaged Issues

Once issues have been triaged, it then falls on the responsible Work Group to resolve the issue.

For issues of type Change Request, Work Groups will need to vote to approve the disposition. For Technical Correction, the issue can be resolved without a vote.

The following table provides a high-level summary of the possible workflow steps that are possible for a Triaged issue. The columns represent the different issue Types allowed for Specification Feedback items. The rows list the Resolutions that are possible. Cells show what workflow transitions (italicized text) can be used to achieve that resolution and what fields can be (or if bold, must be) set as part of the transition. Empty cells indicate that the Resolution is not applicable for that Issue Type.

		Issue Type	
Target Status	Resolution	Change Request	Technical Correction

		Issue Type	
Resolved - Change Required (or Applied)	**Persuasive**	*Will Update Spec* or *Approve Pre-applied Request.* **Resolution, Resolution Vote, Vote Date, Change Category, Change Impact,** Resolution Description (Required unless Persuasive), Assignee, Pre Applied, Applied For Version	*Will Fix* or *Approve Pre-applied Fix.* Resolution Description, Change Category (must be Technical Correction), Change Impact (must be Non-substantive) Assignee, Pre Applied, Applied For Version
	Persuasive with Modification		
	Not Persuasive with Modification		
Resolved - No Change	**Not Persuasive**	*Reject Request* **Resolution, Resolution Vote, Vote Date**	*Reject Fix* **Resolution Description**
Deferred	**Considered for Future Use**	*Defer Request* **Resolution, Resolution Vote, Vote Date**	*Defer Fix* **Resolution Description**

Guidance on Resolution Descriptions:

o   For a Question must be the answer to the question
o   For Not Persuasive must be an explanation of why no change is being made
o   For Persuasive with Modification, must be an explanation of what change will be made
o   For Not Persuasive with Modification, must include an explanation of why the proposed change won't be made as well as what change will be made
o   For a Comment, no description is required, but if desired a simple "Thanks" or "Ok" or something can be included
o   For Persuasive, no description is required, but if desired a more detailed description of what change will be made will be useful. E.g. intended new wording when the submitted issue just said "clarify".