

Introduction to Balloting Interoperability Specifications Webinar Summary

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<u>Date and Time</u>	<u>Location</u>
Tuesday, October 24, 2023, 1:00pm – 2:00pm ET	Virtual
Meeting Objectives:	
1. Describe the process and intent of balloting: <ul style="list-style-type: none"> • Convey credibility and pragmatism of balloting as a method for community consultation and consensus building • Educate on the processes of balloting content at various levels of maturity • Reduce intimidation in trialing a well-vetted, globally recommended process 2. Prepare our pan-Canadian communities to participate in the community balloting process as part of overall Interoperability Product development and maturation process	
Presenters	
<ul style="list-style-type: none"> • Alex Reis, Director, Digital Health Interoperability Portfolio • Sheridan Cook, Standards Lead 	
Invited Guests	
Public	

1. Welcome and Introductions

A. Reis welcomed all participants to the working group meeting and introduced Sheridan Cook. Meeting materials and recording of the session will be made available on the InfoCentral working groups.

2. Content Presentation

The focus of this meeting was to outline the process and purpose of balloting, and to prepare our pan-Canadian communities for participation in the community balloting process, which is integral to the overall development and maturation of Interoperability Products.

The presentation deck is available [Introduction to Balloting Processes Community Education Session](#)

The video recording is available [Introduction to Balloting Processes Community Education Session](#)

3. Questions raised during the webinar

It's important not to mix up HL7's specific processes, like NIBs and formal consensus group formation, with the general balloting needs, as these elements are unique to HL7 and not universally used across all Standards Development Organizations (SDOs).

In our presentations, we clearly identify HL7-specific elements. The stages and content discussed are derived from various Standard Development Organizations, including ISO and ICE, offering a broader perspective on balloting processes.

Can published guidelines be provided for disposition submitters/commenters to ensure their feedback is robust and clear, with criteria for equitable evaluation?

We guide feedback using examples and stress the importance of patience and understanding when reviewing external comments. Our approach includes providing newcomers with guidance for effective participation and offering a framework to assist stakeholders in expressing their input more effectively.

Is there flexibility in the time periods outlined for the various phases of balloting?

Yes, there is flexibility. While we aim to adhere to minimum standards, the actual timelines will largely be driven by the working groups' decisions, their capacities, and the specific challenges they face. The approach is not rigid; the best timeline is one that works effectively for each working group. We plan to start with an initial pilot phase, allowing working groups to evaluate and adjust based on what feels too rushed or too prolonged, ensuring a tailored and effective balloting process.

Are we planning to schedule our balloting process concurrently with the HL7 ballot?

Yes, we are considering a 'bookend approach' to align our balloting process with the HL7 ballot. For example, the HL7 ballots are open from December 22nd to January 22nd. If we schedule our balloting from January 15th to February 14th, it allows for a period where both processes can inform each other. This approach is especially beneficial for critical areas like patient summary, where missing a disposition window in a national ballot could lead to significant delays. Our goal is to create overlapping windows without causing strain, facilitating bi-directional feedback, and learning from both processes. We will assess the effectiveness of this approach this year to determine its viability moving forward.

Are we planning on using HL7 tooling for our balloting process?

Currently, the decision regarding the use of HL7 tooling has not been finalized. For the upcoming January session, we aim to use simpler tools like spreadsheets to allow participants to become familiar with the process. However, the possibility of adopting more evolved and sophisticated HL7 tooling is under evaluation, considering the need for adequate training time for users. The final decision will be made based on practicality and the effectiveness of the tools in facilitating our process.

How flexible are the start and end dates for the disposition process and incorporating specifications, considering past experiences like the lengthy gender harmony validation?

The sequencing of these dates is aggressive, but we are committed to flexibility. The Infoway team is prepared to assist and adapt the process as needed. If a working group needs more time or faces specific challenges, we can offer additional support through Infoway, aiming to streamline the process for quicker completion. This flexibility, however, may not apply universally, especially for topics with higher levels of maturity that attracts more comments. Our goal is to balance the desire for rapid content development with practical constraints, providing necessary support to ensure it is not solely reliant on volunteer efforts.

