

eReferral Working Group Meeting Summary

Meeting Summary

Meeting Chair: Alex Reis			
<u>Date and Time</u>	<u>Location</u>	<u>Note Taker</u>	<u>Next Meeting Date</u>
Wednesday, April 17, 2024, 1:00pm-2:00PM ET	Virtual	Sadrina Petit, Project Analyst, Digital Health Interoperability	April 27 06, 2024, 1:00pm-2:00PM ET
Meeting Agenda: <ol style="list-style-type: none"> 1. Review Sessions – Purpose and Expectations 2. Markup.io demonstration 3. Q&A 			
Presenters			
Mark Fernandes – eReferral / eConsult Product Owner, Tim Berezny – CTO, Caredove			
Invited Guests			
Public			

1. Welcome and Introductions

M. Fernandes welcomed all participants to the working group meeting. Meeting materials and recording of the session will be made available on the InfoCentral working group.

2. Content Presentation

The Infoway Team presented each of the agenda items as outlined above. The focus of this meeting was on the purpose and expectations of review sessions, using Markup.io for collaborative review and a Q&A segment.

The presentation is available: [eReferral Working Group Meeting](#)

The video recording is available: [eReferral Working Group Meeting](#)

3. Markup.io Demonstration:

- Markup.io was introduced as a tool for reviewing documents and providing context-specific comments.
- Working group members can add comments directly within the document using tags and pointers.
- It was demonstrated how to use Markup.io for individual and structured dispositions of comments.
- Example use cases were shown, including simple recommendations and more complex discussions that might require additional feedback before reaching a conclusion.

- The need for managing notifications and tracking new threads or responses was discussed.
- The possibility of using email notifications based on user profiles was mentioned.
- It was suggested that the end of a discussion thread be clearly defined, possibly by the participants who deem the discussion as complete.
- A proposal was made to use a consistent format for closing off discussions with a clear recommendation.
- It was suggested that after a discussion, a final "recommendation" be noted, which would then be integrated into the official documentation or a spreadsheet.
- Different views in Markup.io (e.g., hybrid, diff, snapshot) were discussed to determine which might be most effective for commenting on profiles and elements.
- The hybrid view was suggested as potentially the most useful, allowing participants to see changes clearly while also having access to all element information in the snapshot view.
- The responsibility for gathering final decisions and populating them in a spreadsheet was discussed. It was agreed that whoever initiates a comment thread would be responsible for submitting the final feedback.
- A system to highlight particularly important discussions was proposed, using visual cues like stars in the comment tags.
- A readme file to document the agreed-upon conventions and processes was suggested.
- There was consensus on keeping the process flexible and collaborative, allowing for ongoing adjustments based on user feedback and experience with the tool.

4. Using Markup.io for Document Review and Commenting:

Accessing Specification on Markup.io

- Participants have a [link](#) to access the specification on Markup.io where they can review and comment.
- Add your name and email by clicking the logo on the top left so your comment is not anonymous and other reviewers can @mention you in replies.
- Ensure your markup.io profile is set up to receive notifications via email when someone comments on threads you are involved in or when new comments are added.

Adding Comments to Markup.io

- Use the tools provided by Markup.io to add comments directly within the document. This includes tagging specific parts of the document and writing comments or recommendations.
- When adding initial comments, you can tag any part of the document and provide specific feedback or suggestions.
- For ongoing discussions, participants should use the thread feature to keep all related comments and replies together in the conversation. This is useful for complex issues that require back-and-forth discussion.
- Regularly check the platform to see new comments and discussions, especially if notifications are missed.
- At the end of a discussion, **clearly state a final recommendation**. This helps in documenting the consensus or decision reached.
- Employ agreed-upon conventions like adding stars (***) to the beginning of priority comments that require group attention and ending threads with a clear "**recommendation:**" note.
- When commenting on the view within a FHIR artifact, choose the hybrid (preferred) or snapshot view (not diff view) to add your comment because these views include all the information available. A screenshot will be saved with the comment (takes some to process) so reviewers can be assured that

the context of the comment will be available. Try to maintain consistency in the views used for commenting to avoid confusion about the context of comments.

Consolidating comments for ballot submission

- The person/organization who initiates a thread is generally responsible for summarizing and concluding it based on the discussion.
- Ensure that the final decisions and recommendations are properly documented and integrated into the balloting feedback spreadsheet and supporting documentation. See this [link](#) for instructions on how to formally submit feedback for the specification.
- Be open to feedback on the commenting process and ready to make adjustments to the conventions and practices as needed.

5. Questions raised during the working group meeting:

Is there a way to link the comment from Markup.io to the balloting spreadsheet for additional context?

Yes, you can link to a specific comment in Markup.io by copying the link and inserting it into the spreadsheet cell. This allows for providing more context within the spreadsheet.

How much time are we spending commenting on the central intake model, given the lack of a clear business model?

There was concern about the ongoing churn due to a lack of a clear and consistent understanding of the central intake business model. It was suggested that a proper business model should be established first to make discussions more productive.

How will comments be reviewed and discussed in future sessions, especially with a large number of comments?

It was proposed that comments marked as unresolved might be prioritized for discussion. Additionally, members can flag specific comments for discussion in the workgroup meeting adding 'stars' to the beginning of the comment (***) to help focus on key issues.

How will the different roles and activities of each party in the central intake model be clarified?

The need to define and understand the unique functions and common functions of the central intake model was highlighted. It was proposed that more detailed discussions are needed to clarify these roles before technical messaging can be designed.

Are there any specific guidelines or procedures on how to use Markup.io for the review sessions?

The instructions are provided above to guide the community on how to effectively use Markup.io for collaboration during the review sessions.