**Education Luncheon**

Monday, January 16, 2017

2:53 PM

**Action Items**

**Agenda**

         Welcome

         Healthiest Work Group Stars (Melissa)

         2016 Education WG Highlights

         Training (Virginia)

         Certification (Sharon and Virginia)

         Navigation (Virginia)

         2017 Activities and Your Feedback (Virginia)

         Tutorial Grid Planning (Mary Ann)

         Education WG Wanted List and Invitation to Education WG Participation (Melissa)

         Other agenda items

**Meeting Details**

* Date and Time:  Monday, January 16, 2017 12:30 pm
* Location: San Anotonio, Hyatt Regency, Regency East #1
* Attendees: Sharon Kayne Chaplock, Mary Ann Boyle, Virginia Lorenzi, Melissa Mendivil, Diego Kaminker, Paco Perez, Ted Klein, John Ritter, Heather Grain, Calvin Beebe, Rick Geimer, Oliver Krauss,
* A slide deck was used for the luncheon that is now available on the HL7 Education workgroup site under documents called Education WG luncheon January 2017 \_MM.ppt.

**Announcements and Discussion**

* 2016:  DMP (Decision Management Process)  We included staff members in this process and it was successful.
* Diego reported that we had approximately 150 participants sign up for the FHIR Fundamentals class beginning in March.
* We've also had success with the webinar and webinar series - the vast majority of enrollees prefer self-paced learning.
  + Mary Ann noted that Education findings such as the pulse poll indicate that most people prefer Hl7 education online – in specific, the Fundamentals classes. Sharon noted that as far as webinars are concerned, people especially liked the on-demand download feature.
  + Diego asked if we have metrics on this. Mary Ann and Sharon will pull dashboard/metric numbers – we just need to specify what we are interested in.
* We've offered new tutorials in both the September WGM, January WGM, and more are planned for Madrid.
* Virginia enlisted the help of Columbia educators to give webinars on education tools and techniques such as case based learning.
* Ed to Go :  We need questions!
* Digital Badges:  Request yours today and spread the word!

**Discussion**

* Abdul-Malik noted that he might have an idea of a one-day summit pilot or else onsite training.
* Diego:  Can we get some metrics around webinar downloads and class enrollments?
  + Is the new Education Training matrix reducing the number of questions on this topic currently being fielded by HQ?
  + Should we start educating FHIR courses by domain?
  + Other certifications require a third party to "vouch" for your work in the field.  How do we enforce this as HL7?
* Feedback on education ideas:  create a webinar for first time WGM attendees and first timers orientation especially for connectathon attendees.
* High level webinar targeting clinicians "Why Standards Matter" - may generate some more specific interest to narrower groups.

 Madrid matrix review:

Several people expressed an interest in English tutorials in the hope that people from other European countries as well as India might come – this included V2/CDA/FHIR I think and most likely Standards for Interoperability. Paco noted that he did not think that we should only teach the Introduction to FHIR class in Spanish and the rest of the FHIR classes we only need to teach in English because FHIR is very new there. He said we don’t need all of the FHIR tutorials. Mary Ann expressed a concern that in Paris tutorial attendee numbers were low especially from other countries. She said we can schedule and advertise and if we don’t get enough people we can cancel. Someone said they’d be happy to teach if needed – coming either way – maybe that was Calvin? Virginia suggested that we teach First Time Attendees and Org and Process in English as well as Spanish. A concern was raised about costs and rooms. Mary Ann said we have 3 rooms and will have to prioritize tutorials such that we stick to the 3 rooms. Mary Ann will take all of the input and draft a revised grid.

**Next Meeting**

* Date and Time:  Monday, January 16, 2017 1:45 pm
* Location:  San Anotonio, Hyatt Regency, Regency East #1

**Q3 WGM**

Wednesday, October 05, 2016

4:04 PM

**Agenda**

Committee Meeting

         Approve agenda

         Approval of minutes from September 2016 WGM

         Healthiest Work Group Stars

         Certification program status and process including discussion of FHIR certification (Grahame will attend)

         Mission Statement Review

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**Action Items**

**Meeting Details**

* Date and Time: 1/16/17 1:47 pm
* Location: San Antonio
* Attendees: Virginia Lorenzi, Melissa Mendivil, Graham Grieve, Paco Perez, Diego Kaminker, Sharon Kayne Chaplock, Patrick Lloyd, Lori Simon, Farzarah Namid

**Discussion**

We only discussed FHIR certification at Q3 – rest of items were deferred.

The Process for Achieving and Maintaining the HL7 Professional FHIR Credential:

* Virginia noted that the idea is for the FHIR certification will be an HL7 professional credential which involves an application process with prerequisites, passing an exam, the issuing of a credential that you can use as “letters after your name”, and a renewal cycle. This is in line with other certification/credentialing processes. Virginia presented a spreadsheet on costs and requirements for common certifications related to our field to provide a context for how to establish FHIR certification/credentialing parameters. Examples included PMP and RHIT. The spreadsheet can be referenced on the HL7 Education WG website on the documents tab. It is called CertificationCostsandRequirements.xls.
* We then reviewed a draft document showing proposed criteria for applying for the FHIR credential and renewal. The application was developed by Virginia based on work done with Sharon and Austin for the Implementer’s Committee Professional Certification effort. The attendees reviewed and felt comfortable with the proposal. The proposal is available on the HL7 Education WG website on the documents tab and is called DraftApplication\_and\_Renewal\_Criteria\_for\_HL7\_Professional\_Credential\_for\_FHIR.doc.
* Grahame noted that we need three things as application requirements to sit for the test: FHIR experience (connectathons), one year of field experience, and creating and posting a resource. He felt the application covered this.
* The proposal requires that applicants attest to having 14 points representing a combination of experience, training, and participation. It would need to be renewed every three years, must achieve 25 points with a blend of continuing education, participation, and work experience. There would be a cost to renewal. At this time, no plan for a test for renewal but might revisit that further in the future. In someone fails to renew, would need to reapply and take test.
* We would need to have a process for auditing a percentage of the applications.
* Diego recommended that we not use existing FHIR education courses for certification preparation. He thinks a new focused certification preparation course would be better. Virginia emphasized that you don’t want to turn your regular FHIR courses into cert prep based on her experience since the conversation for those preparing for the exam will becomes all about passing the test instead of how to implement. This focus should be reserved for the cert prep class. We also noted that certification prep classes are never considered sufficient preparation for an HL7 certification test. They are only a preparation aide.
* The test itself will be given in the HL7 electronic test taking format either at a testing site or online with cameras. The test taker will have a copy of the spec proved electronically but no access to the internet or a FHIR server. Unlike our existing tests, the test-taker would not get a grade immediately upon completion because some questions are manually graded. The current process for the short answer questions that are manually graded (in the alpha test) is that Mel Grieve grades the questions based on a list of acceptable correct responses and unacceptable incorrect responses, escalating to Grahame when she in unsure. Virginia asked if it was possible to turn this process over to HL7 staff when the test becomes generally available. Grahame said most likely. Diego proposed that we use the list of correct/incorrect responses to help auto-grade as much as possible. Sharon will look into the feasibility of this.

Work plan:

* Melissa presented the timeline developed by Sharon for review.
* Grahame informed the WG that the FHIR team is writing additional test questions and revising prior test questions based on initial field testing. He noted that there are also creating questions that can be used for practice for prospective test takers.
* He noted that there is not consensus on what the passing score should be. It was noted that a psychometrician could help make this decision.
* He also noted that they want the test to be based on STU3 so would like to plan accordingly.
* Since the actual test will need to be on STU3 and will be timed, online, and only have the specification available to the test-taker, we decided that the field testing currently in progress would be alpha and that we would plan to release beta at the end of April since we can’t finalize questions and sources/evidence until STU3 comes out and Sharon will need a month to get the test implemented using the Criterion software. This is based on the STU3 timeline.
* Melissa recommended that we market the new beta test at our next FHIR connectathon in Madrid, and incent participants to take the beta test? We discussed also offering the test onsite in Madrid as well to provide attention to it. Also, the June FHIR Devday-like ed summit could also spotlight theFHIR test and administer it on site as well.
* Based on the results of beta May-July, Sharon would bring in a specialist on testing score determinations called a psychometrician to help determine a passing score for the test.
* The FHIR team would also need to fix any problems found.
* The online application and application process would need to be built as well and ready for general release.
* Sharon also noted that study guides will be needed – Virginia agreed and noted that the FHIR work on identifying competencies will feed into this.
* Our target for general release would be August or September in time for the September Working Group Meeting.
* Sharon and Virginia can go back and update the work plan based on this feedback.

A FHIR Proficiency Test

* Grahame presented the idea of a second test that the FHIR team is now working on. This is a simpler test which would not have the same application requirements and is a simpler “certificate of knowledge”.
* Grahame has identified 4 courses which will help identify the competancies.
* The test would be pure multiple choice and might be shorter.
* We agreed that the simpler test could have recommended prerequisites such as specific training courses. However, no prerequisite would be required to sit for the test.
* Grahame suggested that the simpler test will have a clinical informatics focus to it. Virginia thought that since this test might be applicable to students, that would be a nice focus.
* Passing of this simpler test could also help an applicant meet requirements for the professional credential (could provide them with some points).
* Grahame noted that they are already working on this second test and wanted to have parallel timeframes to the professional credential.
* It was noted that this will not be possible for Sharon’s part of the work since she will need to implement both tests in Criterian.
* We decided that a new workplan/scope statement is needed for the second test. Virginia will draft one with help from Sharon.
* This second test, though simpler than the credential, will still need competancies, evidence, practice questions, and a study guide.
* Grahame would like both tests released at the same time.
* There are problems getting our scope statements to pass through the TSC with FMG as the owner. Ken McCaslin suggested education take the lead on the PSS so that we can circumvent this. Grahame and Diego were comfortable with this idea. Sharon expressed some concern because there is a clear dependency on FHIR WG members completing their tasks for education to complete the project. We decided however to move forward with this plan.

**Next Meeting**

* Date and Time: 1/16/17 3:30 pm  (Q4)
* Location: San Antonio

**Q4 WGM**

Monday, January 16, 2017

4:46 PM

**Agenda**

Committee Meeting

Items from Q3:

Approve Agenda

Healthiest WG Stars

 Review Mission and Charter Statement

 Planning for May and September 2017 tutorial grids

Tutorial Specification and Brochure Review Process

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**Action Items**

Approve minutes from September WG

Review blurbs for brochures

Melissa:  Proposal for integration with LMS systems

Melissa:  send metrics questions to Mary Ann so that we might be able to work these numbers into a deck for future presentations.

**Meeting Details**

* Date and Time: 1/16/17 3:45 pm
* Location:  San Antonio
* Attendees:  Mary Ann Boyle, Sharon Kayne Chaplock, Heather Grain, Virginia Lorenzi, Melissa Mendivil

**Discussion**

* We did not approve the minutes from the September WG. We are again considered a “healthiest workgroup”. However, we did not yet have stars – will defer to Thursday.

Agenda Review

We did review the agenda for the week and it spurred some discussion as follows:

* + Physician and Nurse breakfasts - who will attend?  We decided that we might not attend this WGM since we need to prepare. We need to research our Partnership with Clinicians initiative as well – Chuck has reached out over email on this. Heather and Melissa expressed concerns regarding identifying our target audience of clinicians and what problem we are helping them solve with HL7 standards. It was noted that we will be meeting with CIC Q2 on Thursday.
  + Melissa suggested the idea of integrating HL7 education into member organzation’s LMS systems and will prepare a proposal.
  + It was noted that we do not have an education metrics dashboard at this WGM due to time constraints. Mary Ann and Sharon will pull the numbers and present at an education conference call within a month. We might also want to revisit what we have asked for as metrics because perhaps we want additional details. We could decide that then.

Mission and Charter

* It was noted that we need to review the mission and charter due to healthy workgroup metrics requirements.
* We used the HL7 Mission and a review of similar workgroup mission and charters to help us in our editing process. We decided to shorten and simplify the Mission and Charter.
* The group unanimously approved the new Mission and Charter and it will be uploaded to the WG site.
* We discussed the HL7 strategic plan which is outdated and that it would be nice to create one based on the HL7 strategic plan. However, currently one does not exist. We did not find a guideline that requires a strategic plan so we deferred at this time.
* The group expressed a concern that we want to be aligned with organization strategy. Although we send a board report, we are not sure if it is reviewed. Mary Ann suggested that we present it at the board meeting or at a board call. We agreed to talk to the board members offline to see if we can get time for education to address them.   We can then open a discussion to ensure that our WG strategy aligns with the organization's direction.

Tutorial Blurb Review

* We noted that we continue to want to review tutorial blurbs but this does not occur in a timely manner.
* We decided that the best way to get this review done was to divide it and try to review while at the WGM.
* We started to review the brochure and identified concerns with the V2 introductory tutorial blurbs. In specific, they do not explain why the tutorial is needed for someone who does not know what HL7 V2 is. Virginia noted that perhaps they have not been updated to align with the first pages of the most recent tutorial specifications. Melissa agreed to wordsmith them and Virginia has emailed Mary Ann a request for the latest tutorial specifications that she has.
* We also reviewed the attachments tutorial blurbs and had some concerns on acronyms and a lack of clarity that to its purpose and US focus. We also thought the name could be improved. Not sure of priority of updating these since they were postponed twice – depends on US rulemaking.
* We also reviewed the CDA tutorial blurbs. We liked the CCDA and XDS blurbs, but thought that the introduction to CDA should tell more about why people would want and need this tutorial by explaining its prevalence of use and what’s its used for and by who. These blurbs also might not be aligned to the tutorial specifications. We then ran out of time on this review process.

**Next Meeting**

* Date and Time: Thursday 1/19/17 9:00 am
* Location: San Antonio Hyatt Regency, Garden Terrace
* Agenda:

Committee Meeting

* Healthiest WG Stars
* Review of Luncheon Feedback and newly proposed educational offerings and ideas (tutorial proposals, webinars, one day summits, etc)

         Tutorial Grid finalization

         Tutorial Review logistics and cancellation process/contingencies

         Education Strategy

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