NON-MEMBER PARTICIPATION IN HL7 INTERNATIONAL BALLOTS

The HL7 Essential requirements (02.04.02) describes the way Non-Members can take part in many HL7 ballots. Nonmembers shall register their intent by completing the Non-Member Enrollment process through the HL7 Desktop. For Normative ballots, once you have requested non-member participation in a ballot and paid any applicable fee, you will automatically be included in any subsequent ballots until that item achieves its final stage for that ballot type. A small administrative fee is assessed for most ballots, usually $400 for single ballots although pricing can vary for comment-only ballots or multiple ballots. Any applicable fees are detailed on the Non-Member Participation page at http://www.hl7.org/ctl.cfm?action=ballots.login.

Requesting participation can be done in just a few minutes on the HL7 Ballot Desktop. If you do request participation in a ballot, please be aware that it can take 2 to 3 business days to process your request and enable your user ID. In addition, the deadline for non-member participation requests is the same as the consensus group signup close date announced for any given ballot cycle: this is usually the day before ballots open for voting. This deadline is identified on the Ballot Desktop and in the Ballot Calendar available on the HL7 web site. Requests received after this deadline will not be processed. Anyone having difficulties signing up for non-member participation can call the HL7 office (+1 734-677-7777) during regular office hours (8 AM to 5 PM M-F Eastern) or email support@hl7.org.

Important Note: non-members should be aware that by participating in an HL7 ballot, the non-member is implicitly agreeing to adhere to all ballot instructions and respond by the ballot closing date. In addition, the non-member is implicitly agreeing to adhere to the tenets of the HL7 intellectual property policies, which can be found on the HL7 web site at http://www.hl7.org/legal/ippolicy.cfm.

[These instructions assume that you are visiting the HL7 Ballot Desktop from a Browser that is not signed in to the site and that has cookies enabled. If you are signed in to the site as a member then the displayed pages have slightly different links and text.]

Navigating to the HL7 Ballot Desktop Non-Member Ballot Login Page

Point your browser to the Non-Member Ballot Login page at: http://www.hl7.org/ctl.cfm?action=ballots.login.
Instructions for Non-Member Participation in HL7 International Ballots

Click on the Non-Member Participation in this Cycle link. You will be taken to the Non-Member Participation page.

If an active ballot cycle is available for participation, you will see a form allowing you to create a Non-Member voter profile. If no active cycles are available for sign-up, then you will see a message indicating the sign-up is not currently available. In this case, you should refer to the Ballot Calendar on the HL7 web site for the next upcoming ballot cycle.

**Signing Up for Participation in Ballot Pools**

Assuming an active ballot cycle is available, signing up is a three-step process.
1. **Create a Non-Member Profile**

   Complete the **Non-Member Profile form** on the screen, making sure to include all of the required fields. Please choose an appropriate classification from among the values listed. These include Provider, Vendor, and Pharmaceutical, among others. This helps us to understand the general area of the Health Care industry you are involved in and, further, to help ensure that we have a balance of industry perspectives represented on the draft standards being balloted. Please also be sure to include a valid email address.

   Once you have completed the form, click on the **Go on to Step 2 button** at the bottom of the page.

2. **Select Ballot Pools**

   The next form allows you to select the ballot pools you would like to participate in. Select the checkbox for each ballot pool you would like to participate in. Pricing may vary on individual pools, and occasionally, through organizational agreements or on the type of ballot, some pools may be available for free.

   When you have selected the pools you would like to participate in, click on the **Go on to Step 3 button** at the bottom of the page.

3. **Agreeing to Balloting Terms and Choosing Method of Payment**

   The final form requires you to indicate your acceptance of the balloting terms. In addition, you will need to provide a user name and password so that your Ballot Desktop User ID can be set up. Finally, if payment is required, you can select an appropriate form of payment. Please be aware that credit card payments cannot be processed on line at the present time. Please allow for 2 to 3 days processing for which ever form of payment you use.

   When you have finalized your choices and agreed to the ballot terms, click on the **Send Participant Information button**. You will receive an initial email confirming your request, and, once your User ID has been set up, you will receive a second email from the HL7 Webmaster informing you that your User ID is active. You can now sign on to the HL7 Ballot Desktop and sign up for the specific pools you would like to vote on.

   **Important notes:** the deadline for non-member paid participation requests is seven days before ballot close for each ballot cycle. Requests received after this deadline will not be processed. Anyone having difficulties signing up for paid participation can get support by calling the HL7 Office (+1 734-677-7777) during regular office hours (8 AM to 5 PM M-F EST) or emailing support@hl7.org.

**Log On to the HL7 Ballot Desktop**

Once your Ballot Desktop User ID is activated, you can log on to the Ballot Desktop using the Non-Member Ballot Login page (identified earlier) at: [http://www.hl7.org/ctl.cfm?action=ballots.login](http://www.hl7.org/ctl.cfm?action=ballots.login).
Alternately, if you are already on the Ballot Desktop home page, you can click on the Non-Member Login link.

Once you have logged in, you should join the ballot pools you have paid for, and you can download any appropriate ballot packages and log your votes.

**Joining Ballot Pools**

Assuming you have successfully logged in, you can join ballot pools from the main Ballot Desktop page for the ballot cycle. To the right of the HL7 logo you will see the Join a Consensus link.

Click this link to be taken to the Join a Pool selection page. You will see numerous pools listed, but only those pools you have paid to join will have active check boxes for you to select.

**Ballot Pools**

**2022 May Ballot Cycle**

Check the appropriate check box(es) and click the Join these marked Ballot Pools button at the bottom of this page.

When the page refreshes you will be returned to the main Ballot Desktop page and you should now see the selected pool(s) listed in the Ballot Document Pools in which you ARE Participating section.
In a few minutes, you should also receive a confirmation email listing the pools you have signed up for.

**Voting in Your Selected Ballot Pools**

Once you are signed up for ballot pools, most voting is conducted in HL7’s Jira environment except reaffirmation and withdrawal ballots which allow voting on the Ballot Desktop.

**Jira Voting**

All line-item feedback eligible ballots will conduct voting in Jira – see [https://confluence.hl7.org/display/HL7/Jira+Ballot+Process](https://confluence.hl7.org/display/HL7/Jira+Ballot+Process)

- You will create and vote on issues in the Jira Specification Feedback Project appropriate for the specification and NOT in the Ballot Desktop.
- We encourage you to review the recorded webinar “Jira Balloting – Navigating the process” in preparation for balloting.

**Reaffirmations and Withdrawals**

Those ballots not accepting feedback at the line-item level, namely reaffirmations and withdrawals, will continue to conduct voting in the ballot desktop as shown below. This voting is affirmative or negative only, with regards to the intent to reaffirm or withdraw a specification, although comments supporting negative votes can be added to the comment fields on the ballot desktop.

1. **Sign-In on the Non-Member Ballot Login page**

   Make sure you are signed in to the Ballot Desktop using your assigned user name and password: [http://www.hl7.org/ctl.cfm?action=ballots.login](http://www.hl7.org/ctl.cfm?action=ballots.login).

   If you have successfully logged in, you will see a welcoming greeting in the upper right hand corner and the Ballot Desktop will display the ballot pools you have previously signed up for in the **Ballot Document Pools in which you ARE Participating section.**

2. **Click on the Vote tab**

   In the upper left corner of the Ballot Desktop page is a **Vote tab**. Click it to go to the Ballot Voting page.
3. Log Your Votes and Upload any Comments

The Ballot Voting page will display a voting form for each of your Reaffirmation or Withdrawal ballots.

**Ballot Voting**

[Image of a voting form]

Select the **Vote radio button** for the ballot vote you would like to cast for each ballot. Vote definitions are as follows:

- **No Return** – The default value for any ballot on which you have not yet cast a vote.
- **Affirmative or Negative** – For the purposes of this ballot the question being asked is as follows:
  
  a. Should the standard be withdrawn as an American National Standard, reaffirmed as an ANS, or subject to revision and brought to ballot as a new version?
  
     - Accordingly, voters should lodge their votes as follows:
    
    1. **Affirmative** – Indicates support of withdrawal of the specification
    2. **Negative** – Indicates support of either reaffirming or revising the specification. If you support either of these actions, indicate your reasons in the comments accompanying your negative vote.

  b. Should the standard be reaffirmed as an American National Standard, withdrawn as an ANS, or subject to revision and brought to ballot as a new version?
  
     - Accordingly, voters should lodge their votes as follows:
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1. **Affirmative** – Indicates support of reaffirmation of the ANS
2. **Negative** – Indicates support of either withdrawing or revising the ANS. If you support withdrawal, indicate your reasons in the comments accompanying your negative vote.

   - **Abstain** – You are neither voting for or against the candidate standard or document, although a vote of abstain will be counted towards the overall quorum requirements of the ballot pool.

4. **Cast Your Votes**

   When you have indicated those votes you wish to cast on the Ballot Voting page, check the box indicating that you have understand the rules governing negative votes, and click the **Cast Vote(s) button**.

   ![Stipulations Governing Affirmative and Negative Votes]

   Shortly after you cast your votes, you should receive a confirmation email for each vote you cast.

   As long as the voting period is open, you can return to the Vote page to cast additional votes, upload revised comments, or change your votes.

**Troubleshooting**

- **I signed up for ballot pools, but they are not displaying**

  Double-check to make sure you are properly signed in to the Ballot Desktop: [http://www.hl7.org/ctl.cfm?action=ballots.login](http://www.hl7.org/ctl.cfm?action=ballots.login). If a welcoming greeting is not displayed in the upper right-hand corner of the screen, then you are not signed in.

  If you are signed in, click on the current ballot cycle link in the left-hand navigation screen. When the page refreshes, your pools should be displayed. This action will resolve 90% of users issues with this problem.

  If your pools are still not displayed, please contact the HL7 office for support.

If at any time you need help using the HL7 Ballot Desktop, you can call HL7 headquarters at 734-677-7777, or email support@hl7.org.