Mapping Heuristics

Introduction to Rules for Mapping Projects
Why do we need mapping rules?

- Provides clear instructions for mapping situations
- Promotes consistent mapping by multiple mappers
- Provides guidance for those tasked with map maintenance
- Provides provenance for map owners
- Source and Target terms are dynamic and heuristic document provides consistent direction.
Why do we need mapping rules?
Heuristics Document Components

• Use Case
  • Details on stakeholders and how intended users will use the mappings.

• Scope
  • Defines what is included and not included in the mapping project.

• Data Governance
  • Prior to mapping, the value set will be analyzed to ensure the values are semantically consistent without ambiguity. Once analysis is complete, the value set should be considered final and locked, with no further edits.

• Target Terminologies
  • Specifies the terminology and maybe some background on that terminology. That is it, nothing more.
Mapping Rules Components

• Target Terminology Version
  • If a new version is released mid project, best practice states the mapping continues with defined mapping version, and completed project is reviewed against new version for changes.

• Mapping Specificity
  • Exact map or if broader than/narrower than mapping are allowed
  • Stakeholder must understand implications of broader than/narrower than mappings

• One-to-one or one-to many mappings

• Target Term Status
  • Is mapping to a retired target term allowable?
Mapping Rules Components

• Qualitative vs Quantitative Terms
  • Rules regarding mapping to 1+, 2+ -like terms, scant, moderate, large terms

• Mapping project specific rule
  • Created during value set analysis
  • Rules are locked down once mapping project starts. No more rules can be added

• Mapping Pilot
  • Test of a subset of the value set to be mapping, ensuring the established mapping rules are consist and mapping rules cover of all mapping scenarios.
Heuristics Document Components

• What to do about unmappable terms?
  • Is it bad source data? Defines what requires new term request from target terminology.

• Quality Assurance
  • Defines the quality controls and validation during the creation and updating processes for stakeholders.
  • Includes mapping and technical QA

• Maintenance Strategy
  • Defines who will be accountable to preserve the integrity of mapped data while providing timely and complete updates of new, deleted, or changed source and target terms.

• Value Set Provenance
  • Describe how a value set was created, how it was validated and by whom. For map maintenance purposes.