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| CDA XSL Update for CDA Release 2.1 |
| Original Approval Date: 2018  Last Reviewed Date: N/A  Review Cycle: Annual |
| HL7 Project Management Office  Project Services Work Group |
|  |
| **Point of Contact Name and Email:**  **David Hamill (**[**pmo@hl7.org**](mailto:pmo@hl7.org)**)**  **Co-Chairs of Project Services Work Group:** [**http://www.hl7.org/Special/committees/projectServices/leadership.cfm**](http://www.hl7.org/Special/committees/projectServices/leadership.cfm) |
| **Publication Date: January, 2017**  **Updated: February, 2017** |
|  |
| URL to download document:  <http://www.hl7.org/permalink/?ProjectScopeStatement> |
|  |
| For prior versions of this document refer to:  <http://www.hl7.org/Special/committees/projectServices/docs.cfm> |

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| The objective of this document is to communicate the type of activities a group is undertaking to achieve specific objectives or to produce specific work products. It’s intended for projects to produce standards or Implementation Guides as well as infrastructure projects. |

**Template Usage Information:**

* Replace **Highlighted Courier New** text with appropriate content.
* To use Track Changes, turn off “protection” by clicking on Tools > Unprotect Document; in Word 2010, select Review>Track Changes
* For assistance in completing each section, refer to [Appendix A](#Appendix_A).
* Information on the Project Approval Process is documented in [Appendix B](#Appendix_B).
* For FAQs (Frequently Asked Questions), refer to [Appendix C](#_Appendix_C_–)
* Submit template change requests to [PMO@HL7.org](mailto:PMO@HL7.org)
* PSS-Lite/Investigative Projects: Sections surrounded by a **BOLD OUTLINE** must be completed for approval of "Investigative Projects"

1. Project Name and ID

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| [*Click here*](#Project_Name_help) *to go to Appendix A for more info regarding this section including guidance on naming conventions.* | | | | *An ID will be assigned by Project Insight* |
| **CDA XSL update for CDA Release 2.1** | | | | Project ID: 1421 |
|  |  | TSC Notification Informative/STU to Normative | Date : | |
|  | | | |
|  |  | Investigative Project (aka PSS-Lite) | Date : | |
|  | | | | |

1. Sponsoring Group(s) / Project Team

[*Click here*](#Sponsoring_Group_help) *to go to Appendix A for more information regarding this section.*

* 1. Primary Sponsor/Work Group

|  |  |
| --- | --- |
| Primary Sponsor/Work Group  **(1 (And Only 1) Allowed)** | **Structured Documents** |

* 1. Co-sponsor Work Group(s)

|  |  |
| --- | --- |
| Co-sponsor Work Group(s)  (Enter co-sponsor approval dates in Section 6.d Project Approval Dates) | -- |
| Indicate the level of involvement that the co-sponsor will have for this project:   |  |  |  | | --- | --- | --- | |  | Request formal content review prior to ballot | | |  | Request periodic project updates. Specify period: |  | | |  | Other Involvement. Specify details here: |  | | | |

* 1. Project Team

*All names should have confirmed their role in the project prior to submission to the TSC.*

|  |  |
| --- | --- |
| Project facilitator (**1** **Mandatory**) | **Lisa Nelson** |
| Other interested parties and their roles | **George Dixon; Ben Flessner; Eric Parapini;** |
| Multi-disciplinary project team (recommended) |  |
| Modeling facilitator | **Alexander Henket** |
| Publishing facilitator | **Lisa Nelson** |
| Vocabulary facilitator | **n/a** |
| Domain expert rep |  |
| Business requirement analyst |  |
| Conformance facilitator (for IG projects) |  |
| Other facilitators (SOA, etc) | Austin Kreisler (SDWG Co-chair) |
|  |  |
| Implementers **(2** **Mandatory** for STU projects)  ***FHIR Project Note:*** *The implementer requirement will be handled by the “balloting” project. Therefore work groups do not fill out the above section. However, feel free to list implementers specific to your work group’s resources if you know of any.* | |
| 1) Dynamic Health IT | |
| 2) Allscripts | |

1. Project Definition
   1. Project Scope

[*Click here*](#Project_Scope_help) *to go to Appendix A for more information regarding this section and FHIR project instructions.*

|  |
| --- |
| **This project will yield an updated CDA XSL compatible with CDA R2.1 and R2.0. This is intended to be a BASIC stylesheet. It also will address outstanding GForge issues on Structured Doc tracker.**  **It may address the issue in CDA R2.0 to take out the list bullet when you don’t want it. It will consider improvements that may incorporate usage preferences based on experience gained from the CDA R2.0 stylesheet. For example, if there could be an option to design the stylesheet to put more of the header information at the bottom of the document rendering. It will consider if it makes sense to offer options to handle on-screen rendering differently than printing (and large print too). Address multilingual support as well. Include some level of documentation about how to use the stylesheet.**  **If not already covered by the CDA R2.1 project, includes the creation/update of one or more sample CDA R2.1 document(s) that can be used to test the stylesheet.** |

* 1. Project Need

[*Click here*](#Project_Need_help) *to go to Appendix A for more information regarding this section and FHIR project instructions.*

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| **The CDA XSL that Structured Documents WG maintains as an informative reference implementation for rendering CDA Release 2.0 needs updating for the upcoming CDA Release 2.1. CDA Release 2.1 introduces a number of new elements that need rendering. The reference XSL needs to cater for those to live up to its status as reference implementation. CDA R2.0 stylesheet has reported bugs that needs to be fixed.** |

* 1. Security Risks

[*Click here*](#Security_Risks_help) *to go to Appendix A for more information regarding this section.*

|  |  |  |  |
| --- | --- | --- | --- |
| Will this project produce executable(s), for example, schemas, transforms, style sheets, executable program, etc. If so the project must review and document security risks. Refer to Appendix A for additional instructions. |  | X | **Yes** |
|  |  | **No** |
|  |  | **Unknown** |

* 1. External Drivers

[*Click here*](#External_Drivers_help) *to go to Appendix A for more information regarding this section.*

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| **The project should deliver its output arounds the same time that CDA Release 2.1 goes live so that release may reference the XSL as before in CDA release 2.0** |

* 1. Project Objectives / Deliverables / Target Dates

|  |  |
| --- | --- |
| *Within each row, enter the explicit work product(s) / objective(s). Indicate their target date at the right in WGM/Ballot Cycle format. Include the project end date as the last objective (for standards projects, the end date will be the projected ANSI approval date).*  [*Click here*](#Project_Obj_Del_TgtDates_help) *for further information, FHIR project instructions, and an* [*EXAMPLE*](#Project_Obj_Del_TgtDates_Example_help) | **Target Date** *(in WGM or ballot cycle format, e.g.*  *‘2017 Sept WGM’ or*  *‘2017 Jan Ballot’)* |
| **Example: Submit for Comment Ballot (First Ballot Cycle)** | **2018 March 11th, 25th** |
| **Example: Complete Comment Reconciliation** | **2018 Sept WGM** |
| **Example: Submit Publication Request (within SDWG/CMG)** | **FALL 2018 TBD** |
| **Example: Publish in GForge when available** | **FALL 2018 TBD** |

* 1. Common Names / Keywords / Aliases

[*Click here*](#Common_Names_Keys_Aliasis_help) *to go to Appendix A for more information regarding this section.*

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| **CDA R2.1 Stylesheet** |

* 1. Lineage

[*Click here*](#Lineage_help) *to go to Appendix A for more information regarding this section.*

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* 1. Project Dependencies

[*Click here*](#Project_Dependencies_help) *to go to Appendix A for more information regarding this section.*

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| **To the extent that the CDA XSL needs to support CDA Release 2.1, the outcome of that project influences what the CDA XSL contains.** |

* 1. Project Document Repository Location

[*Click here*](#Project_Doc_Repository_Location_help) *to go to Appendix A for more information regarding this section.*

|  |
| --- |
| **https://gforge.hl7.org/gf/project/strucdoc/frs/** |

* 1. Backwards Compatibility

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Are the items being produced by this project backward compatible? |  | x | Yes |  |  | No |  |  | Unknown |  |  | N/A |
|  |  |  |  |  |  |  |  |
| If you check 'Yes' please indicate the earliest prior release and/or version to which the compatibility applies:  CDA R2.0 | | | | | | | | | | | | |
|  | | | | | | | | | | | | |
| For V3, are you using the current data types?  (Refer to [TSC position statement on new projects using R2B](#TSC_position_statement_on_R2B) for more information on the current V3 data types) |  |  | Yes |  | x | No |  |  | Unknown |  |  | N/A |
|  | | |  | | |  |  |  |  |  |  |
| If you check 'No' please explain the reason: | | | | | | | | | | | | |
| **CDA Release 2.0 and 2.1 use Datatypes Release 1.x** | | | | | | | | | | | | |

* 1. External Vocabularies

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Will this project include/reference external vocabularies? |  | x | Yes |  |  | No |  |  | Unknown |  |  | N/A |
|  |  |  |  |  |  |  |  |  |  |  |  |
| If yes, please list the vocabularies: LOINC, SNOMED CT, … as present in the instances for rendering @displayName only | | | | | | | | | | | | |

1. Products (check all that apply)

[*Click here*](#Products_help) *to go to Appendix A for more information regarding this section*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Arden Syntax |  |  | V2 Messages – Administrative |
|  | Clinical Context Object Workgroup (CCOW) |  |  | V2 Messages - Clinical |
|  | Domain Analysis Model (DAM) |  |  | V2 Messages - Departmental |
|  | Electronic Health Record (EHR) Functional Profile |  |  | V2 Messages – Infrastructure |
|  | FHIR Extensions |  |  | V3 Domain Information Model (DIM / DMIM) |
|  | FHIR Implementation Guide |  |  | V3 Documents – Administrative (e.g. SPL) |
|  | FHIR Profiles |  | x | V3 Documents – Clinical (e.g. CDA) |
|  | FHIR Resources |  |  | V3 Documents - Knowledge |
|  | Guidance (e.g. Companion Guide, Cookbook, etc) |  |  | V3 Foundation – RIM |
|  | Logical Model |  |  | V3 Foundation – Vocab Domains & Value Sets |
|  | New/Modified/HL7 Policy/Procedure/Process |  |  | V3 Messages - Administrative |
|  | New Product Definition (please define below) |  |  | V3 Messages - Clinical |
|  | New Product Family (please define below) |  |  | V3 Messages - Departmental |
|  | Non Product Project - (Educ. Marketing, Elec. Services, etc.) |  |  | V3 Messages - Infrastructure |
|  | White Paper |  |  | V3 Rules - GELLO |
|  |  |  |  | V3 Services – Java Services (ITS Work Group) |
|  | Creating/Using a tool not listed in the [HL7 Tool Inventory](http://hl7-tools.herokuapp.com/) |  |  | V3 Services – Web Services (SOA) |

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1. Project Intent (check all that apply)

[*Click here*](#Project_Intent_help) *to go to Appendix A for more information regarding this section and FHIR project instructions.*

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Create new standard | | | |  | X | Supplement to a current standard | | |
|  | Revise current standard (see text box below) | | | |  |  | Implementation Guide (IG) will be created/modified | | |
|  | Reaffirmation of a standard | | | |  |  | Project is adopting/endorsing an externally developed IG: | | |
|  | New/Modified HL7 Policy/Procedure/Process | | | |  |  | Specify external organization in Sec. 6 below; | | |
|  | Withdraw an Informative Document | | | |  |  | Externally developed IG is to be (select one): | | |
|  | White Paper (select one): | | | |  |  | Adopted - OR - |  | Endorsed |
|  |  | Balloted Informative OR |  | Non-balloted WG White Paper |  |  | N/A (Project not directly related to an HL7 Standard) | | |

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| **CDA XSL** |

* 1. Ballot Type (check all that apply)

[*Click here*](#Ballot_Type_help) *to go to Appendix A for more information regarding this section and FHIR project instructions.*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Comment (aka Comment-Only) | | |  |  | Joint Ballot (with other SDOs) |
|  | Informative | | |  | X | N/A (project won’t go through ballot) |
|  | STU to Normative - OR - |  | Normative (no STU) |  |  |  |

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* 1. Joint Copyright

[*Click here*](#Joint_Copyright_help) *to go to Appendix A for more information regarding this section*

*Check this box if you will be pursuing a joint copyright. Note that when this box is checked, a Joint Copyright Letter of Agreement must be submitted to the TSC in order for the PSS to receive TSC approval.*

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Joint Copyrighted Material will be produced? |  |  | Yes |  | x | No |  |  |

1. Project Logistics
   1. External Project Collaboration

[*Click here*](#External_Project_Collaboration_help) *to go to Appendix A for more information regarding this section and FHIR project instructions.*

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | | | | | |
| For projects that have some of their content already developed: | | | | | | | |
| How much content for this project is already developed? | **> 90%** | | | | | | |
| Was the content externally developed (Y/N)? | **N** | | | | | | |
| Is this a hosted (externally funded) project?  (not asking for amount just if funded) |  |  |  |  |  |  | |
|  |  | Yes |  | x | No |

* 1. Realm

[*Click here*](#Realm_help) *to go to Appendix A for guidelines regarding choosing Universal or Realm Specific.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| x | Universal - OR - |  |  | Realm Specific |
|  | |  |  | Check here if this standard balloted or was previously approved as realm specific standard |
|  | |  | | |

* 1. Stakeholders / Vendors / Providers

[*Click here*](#Stakeholders_Customers_Providers_help) *to go to Appendix A for more information regarding this section*

*This section must be completed for projects containing items expected to be ANSI approved, as it is an ANSI requirement for all ballots*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | | **Stakeholders** |  | **Vendors** |  | **Providers** |
| **X** | | Clinical and Public Health Laboratories | **X** | Pharmaceutical | **X** | Clinical and Public Health Laboratories |
| **X** | | Immunization Registries | **X** | EHR, PHR | **X** | Emergency Services |
| **x** | | Quality Reporting Agencies |  | Equipment | **X** | Local and State Departments of Health |
|  | | Regulatory Agency | **X** | Health Care IT |  | Medical Imaging Service |
| **x** | | Standards Development Organizations (SDOs) | **X** | Clinical Decision Support Systems | **X** | Healthcare Institutions (hospitals, long term care, home care, mental health) |
| **x** | | Payors | **X** | Lab |  | Other (specify in text box below) |
|  | | Other (specify in text box below) | **X** | HIS |  | N/A |
|  | | N/A |  | Other (specify below) |  |  |
|  | |  |  | N/A |  |  |
| |  | | --- | | **Other:** | | | | | | |

* 1. Project Approval Dates

[*Click here*](#Project_Approval_Dates_help) *to go to Appendix A for more information regarding this section.*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Affiliate Approval Date (for Affiliate Specific Projects): | **N/A** | | | | | | | | |
| US Realm Steering Committee Approval Date  (for US Realm Specific Projects): | **N/A** | | | | | | | | |
| Sponsoring Work Group Approval Date: | **WG Approval Date 2018-01-31** | | | | | | | | |
| Co-Sponsor Group Approval Date  (Copy this entire row for each co-sponsor; indicate the specific cosponsor that issued approval) | **N/A** | | | | | | | | |
| CDA Project: [CDA Management Group](http://www.hl7.org/Special/committees/cdamg/leadership.cfm) Approval Date: | **CMG Approval Date 2018-02-09** | | | | | | | | |
| Architectural Review Board Approval Date:  (required for externally developed content) | **N/A** | | | | | | | | |
| Steering Division (of Primary Sponsor WG) Approval Date: | **SD Approval Date 2018-06-05** | | | | | | | | |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Last [PBS Metrics Score](http://gforge.hl7.org/gf/project/tsc/frs/?action=FrsReleaseBrowse&frs_package_id=169): |  | Green |  | Yellow |  | Red | | [PBS Metrics Reviewed](http://gforge.hl7.org/gf/download/docmanfileversion/9076/13967/PBS%20Metric%20Guidance%20for%20SD%20CoChairs%202016%20Final.doc)? (required for SD Approval if not green) | | |  | Yes |  | No | | | | | | | | | | |
| Technical Steering Committee Approval Date: | **TSC Approval Date 2018-06-22** | | | | | | | | |
| TSC has received a Copyright/Distribution Agreement (containing the verbiage outlined within the SOU), signed by both parties. |  | | |  |  |  |  | |  |
|  |  | Yes |  | No | |  | N/A | |