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| Project Scope Statement  2012 Version  Release 1 |
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| 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: April, 2012** |
|  |
| 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
* 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

1. Project Name and ID

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| [*Click here*](#Project_Name_help) *to go to Appendix A for more information regarding this section.* | *An ID will be assigned by Project Insight* |
| **Patient Authored Documents** | Project ID: |

1. Sponsoring Group(s) / Project Team

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

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| Primary Sponsor/Work Group (**1 Mandatory**) | **Structured Documents** |
| Co-sponsor Work Group(s) |  |
|  |  |
| **Project Team:** |  |
| Project facilitator (**1** **Mandatory**) | **Virinder Batra** |
| Other interested parties and their roles | Leslie Kelly Hall; Joy Kuhl (Health Story); Lisa Nelson |
| Multi-disciplinary project team (recommended) |  |
| Modeling facilitator | Bob Dolin |
| Publishing facilitator |  |
| Vocabulary facilitator |  |
| Domain expert rep |  |
| Business requirement analyst |  |
| Other facilitators (SOA, SAIF) |  |
|  |  |
| Implementers **(2** **Mandatory** for DSTU projects): | |
| 1) Intuit | |
| 2) Healthwise | |

1. Project Definition
   1. Project Scope

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

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| **In the “era of patient empowerment”, we want to define a specification for patient-authored clinical documents.**  **Medical practices are looking for ways to allow patients to electronically complete certain tasks online such as filling out registration forms, health history forms, consenting to certain practice policies, and other types of clinical documents yet to be defined. As electronic document interchange increases, we see a growing need to communicate documents created by patients (including those needed by providers and/or those document types defined by patients). Often, this is done through a secure web interface controlled by the patient such as a patient portal or a personal health record. As more and more practices incorporate EMR technology into their practice workflow, they want to be able to import patient provided structured information into their EMR’s. This is being driven by the need to meet Meaning Use 2 requirements for patient engagement as well as other needs to reduce manual processes managing patient-provided data.**    **The HL7 CDA Consolidation Documents types only address provider-initiated documents and do not incorporate guidance for patient-generated documents. It is necessary to create a new implementation guide describing how to incorporate patient-generated input. In many cases, existing templates within the current Consolidation Template Library can be re-used with minimal modification.** |

* 1. Project Need

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| **The goal of this project is to create an implementation guide, which will guide the users on using the CDA consolidation header to indicate a patient author.**  **The document described by this guide could be characterized as a parallel to Consolidated CDA, that would ultimately have both the generic approach, and the specific patient-authored document types. We anticipate that Consolidated CDA templates will be heavily reused.**  **If required, we may extend the project scope or introduce another project for defining an implementation guide for a set of patient authored document types.** |

* 1. Success Criteria

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| 1. **Successfully balloted** 2. **Successfully published as an Informative Document in the target timeline** 3. **Sets the stage for creating more specific patient-authored note document types** |

* 1. Project Objectives / Deliverables / Target Dates

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| *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_Deliv_TgtDate_help) *for further information and an* *[EXAMPLE](#Project_Obj_Deliv_TgtDate_Example_help)* | **Target Date** *(in WGM or ballot cycle format, e.g.*  *‘2010 Sept WGM’ or*  *‘2010 Jan Ballot’)* |
| **Implementation Guide Draft in time for January Ballot** | **2013 Jan Ballot** |
| **Project End Date** | **May 2013** |
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* 1. Project Dependencies

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| **None** |

* 1. Project Document Repository Location

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| <http://wiki.hl7.org/index.php?title=Patient_Authored_Documents_Informative_Document> |

* 1. Backwards Compatibility

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| |  |  |  |  |  | | --- | --- | --- | --- | --- | | Are the items being produced by this project backward compatible? | Yes | No | Don’t Know | N/A | |

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| **The intent of this guide is to create a specification compatible with CDA Consolidation** |

1. Products

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

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| |  |  | | --- | --- | |  | Non Product Project- (Educ. Marketing, Elec. Services, etc.) | | |  |  | | --- | --- | |  | V3 Documents - Knowledge | |
| |  |  | | --- | --- | |  | Arden Syntax | | |  |  | | --- | --- | |  | V3 Foundation – RIM | |
| |  |  | | --- | --- | |  | Clinical Context Object Workgroup (CCOW) | | |  |  | | --- | --- | |  | V3 Foundation – Vocab Domains & Value Sets | |
| |  |  | | --- | --- | |  | Domain Analysis Model (DAM) | | |  |  | | --- | --- | |  | V3 Messages - Administrative | |
| |  |  | | --- | --- | |  | Electronic Health Record (EHR) | | |  |  | | --- | --- | |  | V3 Messages - Clinical | |
| |  |  | | --- | --- | |  | Functional Profile | | |  |  | | --- | --- | |  | V3 Messages - Departmental | |
| |  |  | | --- | --- | |  | V2 Messages – Administrative | | |  |  | | --- | --- | |  | V3 Messages - Infrastructure | |
| |  |  | | --- | --- | |  | V2 Messages - Clinical | | |  |  | | --- | --- | |  | V3 Rules - GELLO | |
| |  |  | | --- | --- | |  | V2 Messages - Departmental | | |  |  | | --- | --- | |  | V3 Services – Java Services (ITS Work Group) | |
| |  |  | | --- | --- | |  | V2 Messages – Infrastructure | | |  |  | | --- | --- | |  | V3 Services – Web Services | |
| |  |  | | --- | --- | |  | V3 Documents – Administrative (e.g. SPL) | | |  |  | | --- | --- | |  | - New Product Definition - | |
| |  |  | | --- | --- | |  | V3 Documents – Clinical (e.g. CDA) | | |  |  | | --- | --- | |  | - New/Modified HL7 Policy/Procedure/Process - | |

2. Project Intent (check all that apply)

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

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| |  |  | | --- | --- | |  | Create new standard | |  | Revise current standard (see text box below) | |  | Reaffirmation of a standard | |  | New/Modified HL7 Policy/Procedure/Process | |  | N/A (Project not directly related to an HL7 Standard) | | |  |  | | --- | --- | |  | Supplement to a current standard | |  | Implementation Guide (IG) will be created/modified | |  | Project is adopting/endorsing an externally developed IG  *(specify external organization in Sec. 6 below)* | |  | Externally developed IG is to be Adopted | |  | Externally developed IG is to be Endorsed | |

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| **CDA Consolidation** |

* 1. Ballot Type (check all that apply)

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| |  |  | | --- | --- | |  | Comment Only | |  | Informative | |  | DSTU to Normative | | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | |  | Normative (no DSTU) | |  | Joint Ballot (with other SDOs or HL7 Work Groups) | |  | N/A (project won’t go through ballot) | | |

1. Project Approval Dates

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

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| Sponsoring Group Approval Date | **June 07, 2012** |
| Steering Division Approval Date | **SD Approval Date CCYY-MM-DD** |

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| |  |  |  | | --- | --- | --- | | PBS Metrics Reviewed? (required for SD Approval) | Yes | No | |

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| Technical Steering Committee Approval Date | **TSC Approval Date CCYY-MM-DD** |

1. External Project Collaboration

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

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* 1. Stakeholders / Vendors / Providers

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

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

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* 1. Synchronization With Other SDOs / Profilers

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

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| Check all SDO / Profilers which your project deliverable(s) are associated with. | | |
| ASC X12 | CHA | LOINC |
| AHIP | DICOM | NCPDP |
| ASTM | GS1 | NAACCR |
| BioPharma Association (SAFE) | IEEE | Object Management Group (OMG) |
| CEN/TC 251 | IHE | The Health Story Project |
| CHCF | IHTSDO | WEDI |
| CLSI | ISO | Other (specify below) |

1. Realm

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

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

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| |  |  | | --- | --- | | US |  | |  |

1. Strategic Initiative Reference – For PMO/TSC Use Only

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

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| This section used only for Strategic Initiative Projects.   |  |  | | --- | --- | |  | 1. HL7 Recognition | |  | 1. HL7 Internal Processes | |  | 1. HL7 Implementation | |

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