1. Project Name and ID

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| **Harmonization of Health Quality Information Models** | Project ID: 1045 |
| |  |  | | --- | --- | |  | TSC Notification DSTU/Informative to Normative Date : | | |
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1. Sponsoring Group(s) / Project Team

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| --- | --- |
| Primary Sponsor/Work Group (**1 Mandatory**) | **Clinical Quality Information (CQI)** |
| Co-sponsor Work Group(s) | Clinical Decision Support (CDS), Structured Documents (SD) |
|  |  |
| **Project Team:** |  |
| Project facilitator (**1** **Mandatory**) | **Aziz Boxwala, Chris Millet** |
| Other interested parties and their roles | Clinical Statement , ArB |
| Multi-disciplinary project team (recommended) |  |
| Modeling facilitator | **Mark Kramer** |
| Publishing facilitator | TBD |
| Vocabulary facilitator | **Kendra Hanley** |
| Domain expert rep | Bryn Rhodes, Claude Nanjo, Marc Hadley, Ken Kawamoto, David Shields, Victor Lee |
| Business requirement analyst | Rute Martins, Cynthia Barton |
| Conformance facilitator (for IG projects) |  |
| Other facilitators (SOA, SAIF) |  |
|  |  |
| Implementers **(2** **Mandatory** for DSTU projects): | |
| ONC S&I Framework | |
| CMS | |

1. Project Definition
   1. Project Scope

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| The scope of this project is to identify and align information models used for health quality measures and decision support. To do so, this project will be carried out over phases that roughly align to the components of the SAIF Interoperability Specification Matrix -:   1. **Conceptual Information Model** – The first phase of this project, initiated with the January 2014 ballot cycle, is producing a Health Quality Domain Analysis Model. This model will serve as the common conceptual information model for quality measurement and improvement. The Quality DAM will support the following use cases:    1. Quality Measure Development    2. CDS Artifact Development    3. Quality Measure Implementation    4. Quality Measure Reporting    5. CDS Artifact Implementation    6. CDS Services   This phase includes aligning concepts from existing information models such as the Quality Data Model, HQMF, QDM Based HQMF, Consolidated CDA, QRDA Category 1, QRDA Category 3, vMR for CDS Logical Model, vMR for CDS XML Implementation Guide, and Clinical Statement.   1. **Logical Information Model and FHIR mapping** – The second phase of this project will create a logical information model. The requirements will be driven by the conceptual information model. As part of this project, the following activities will be carried out    1. Create a mapping from the conceptual model, QDM, and vMR to FHIR. This will enable us to identify gaps in FHIR to fulfill the needs for health quality improvement.    2. Create recommendations for and facilitate changes to FHIR to incorporate the required elements of the conceptual information model. This may include creating new FHIR resources, profiling existing resources, or adding extensions to existing resources.    3. Develop a logical model from the FHIR profile suitable for health quality improvement.    4. Explore the relationship of health quality improvement expressions to the logical model. The expression languages used in CDS artifacts and quality measures provide greater usability by supplying a level of abstraction and “syntactic sugar”. Expressions must have a tight mapping to the platform model (i.e., FHIR) via the logical model. As part of this activity, we will explore how the expression language and data model interoperate, traversal of links between resources where the destination resource may be one of many types, and what changes, if any, are needed in expression language or the model. This model will be tested by creating expressions in the syntax being proposed in the related Expression Logic Harmonization project.   Consideration will be given to the appropriateness of including particular elements of the source models in the harmonized model. An example of such elements that have been encountered to date are the CDS execution components, i.e., the CDSInput, CDSOutput, and CDSContext containers from the vMR specification. For source model elements, especially those from vMR and QDM, that are not mapped, recommendations will be created for moving those elements into existing or new models and specifications. Implementations of these recommendations may occur as part of separate projects or within the scope of this project, as deemed appropriate.  The scope of this project does not include changes to what is commonly referred to as “expression logic”, which are products that fall within the Behavioral Models column of the SAIF Interoperability Specification Matrix. This work will be addressed by the Expression Logic Harmonization Project Scope Statement.  This project will also not include work related to aligning the metadata used for Quality Improvement, which will be addressed in the Common Metadata Project Scope Statement.  This project scope statement updates an earlier statement that was scoped for creating only the conceptual information model. |
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* 1. Project Need

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| This project is part of a broader effort to align the HL7 Product Family related to Health Quality using the Interoperability Specification Matrix of the HL7 Services Aware Interoperability Framework as a guiding framework. The expression of clinically relevant information for use in quality measurement and clinical decision support has historically been viewed from different perspectives, based on the different specific needs of each domain. However, the existing artifacts provide significantly different approaches to representation of what are essentially the same underlying concepts. This project seeks to identify and align the information models used for quality measurement, reporting and clinical decision support. |

* 1. Success Criteria

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| To define a clinical information model consisting of both a conceptual and a logical model that has the coverage, expressivity, and granularity needed to address the project’s stated use cases and whose logical model can be successfully adopted by CQI and CDS for the representation of clinical information contained within knowledge artifacts such as those represented currently by HQMF (e-measures), CDS Knowledge Artifacts (order sets, rules, documentation templates), QRDA (quality reports), and C-CDA or such representations required by CDS service payloads. Such a common model provides the common clinical foundation for these related use cases and ultimately promotes interoperability, common domain understanding and easier implementation in the field.  Success for this project will be to create an approach to the logical model in time for the May 2014 Ballot Cycle and a complete logical model for Health Quality for the September 2014 Ballot. |

* 1. Project Objectives / Deliverables / Target Dates

|  |  |
| --- | --- |
|  | **Target Date** |
| **Health Quality DAM resubmitted for informative ballot** | **May 2014 cycle**  **(potentially Sept 2014 cycle also)** |
| **Health Quality Logical Model, mapping to FHIR resources, and recommendations for comments only ballot** | **May 2014 cycle** |
| **Health Quality Logical Model for DSTU ballot** | **Sept 2014 cycle** |
|  |  |

* 1. Project Requirements

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| **Documentation of the existing vMR, QDM, and a synthesis of requirements of the harmonization of both models can be found at the following links:**  **HL7 VMR Project:** [**http://wiki.hl7.org/index.php?title=Virtual\_Medical\_Record\_%28vMR%29**](http://wiki.hl7.org/index.php?title=Virtual_Medical_Record_%28vMR%29)  **NQF QDM:** [**http://www.qualityforum.org/QualityDataModel.aspx#t=2&s=&p**](http://www.qualityforum.org/QualityDataModel.aspx#t=2&s=&p)**=**  **QDM/vMR Requirements document:**  [**https://docs.google.com/document/d/1C01NCpQT5sDQUvMeIXbLr5caJOg9DGBbdL16qFeKizw/edit?usp=sharing**](https://docs.google.com/document/d/1C01NCpQT5sDQUvMeIXbLr5caJOg9DGBbdL16qFeKizw/edit?usp=sharing)  **Additional requirements for the logical model will be documented in the project document repository.** |

* 1. Project Risks

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| Risk Description | **Logical model development starts before the completion of the scope of the conceptual model** | | |
| Impact Description | **A complete conceptual model is needed for the development of the complete logical model to make sure the two are aligned with each other.** | | |
| Probability: | |  |  |  | | --- | --- | --- | | High | Medium | Low | | Severity: | |  |  |  | | --- | --- | --- | | High | Medium | Low | |
| Mitigation Plan | * **The core of the conceptual model has been completed and several clinical statements already developed. The current conceptual model is sufficient to start the development of the logical model and submit for the comment-only ballot in May. We expect to complete the remainder of the conceptual model in time for the May ballot and use that to complete the remainder of the logical model for the September ballot.** | | |

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| Risk Description | FHIR is not implemented in EHR Systems | | |
| Impact Description | Finding the right balance between feasibility (resembling what is in EHR Systems) and specificity supported by evidence | | |
| Probability: | |  |  |  | | --- | --- | --- | | High | Medium | Low | | Severity: | |  |  |  | | --- | --- | --- | | High | Medium | Low | |
| Mitigation Plan | * Engage vendors, implementers, measure developers, CDS artifact authors in the development of this model * Use incremental approach to achieve project goals * Using a regular and incremental approach to create and update this model to ensure updates balance feasibility/specificity concerns while allowing enhancements to better support existing implementations | | |

* 1. Project Dependencies

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| This project will depend on other projects related to aligning the Product Family related to Health Quality. |

* 1. Project Document Repository Location

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

* 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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| **To support existing quality measures, CDS artifacts that use QDM and vMR, and to ensure that these artifacts can transition to the new DAM, the DAM will document mappings between existing models and the new model.** |

1. Products

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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 - | |
| |  |  | | --- | --- | |  | FHIR Resources | | |  |  | | --- | --- | |  | FHIR Extensions | |
| |  |  | | --- | --- | |  | FHIR Profiles (NEW PRODUCT TYPE) | | |  |  | | --- | --- | |  |  | |
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1. Project Intent (check all that apply)

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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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* 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. Joint Copyright

|  |  |  |
| --- | --- | --- |
| |  |  | | --- | --- | |  | Joint Copyrighted Material will be produced | |

1. Project Approval Dates

|  |  |
| --- | --- |
| Sponsoring Group Approval Date | **CQI WG 2013-10-04, 2014-01-31, 2014-21-03**  **CDS WG 2013-10-04, 2014-01-31, 2014-21-03**  **SD WG 2013-10-03, 2014-01-30, 2014-6-05**  **ArB projected 2013-11-26, Not co-sponsoring** |
| Steering Division Approval Date | **2013-11-11** |

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

|  |  |
| --- | --- |
| US Realm Task Force reviewed | **2013-11-13** |
| Technical Steering Committee Approval Date | **2013-11-18** |
| |  |  |  | | --- | --- | --- | | Joint Copyright Letter of Agreement received? (req'd for Joint Copyrighted material) | Yes | No | | |

1. External Project Collaboration

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| --- |
| **This effort will consult with activities of the S&I Framework initiatives, specifically including Transitions of Care Initiative, Health e-Decisions Initiative, Query Health Initiative, Data Access Framework, Structured Data Capture and may include other S&I Framework initiatives as well.** |

* 1. Stakeholders / Vendors / Providers

|  |  |  |
| --- | --- | --- |
| **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) |  |
|  | N/A |  |

|  |  |
| --- | --- |
| |  | | --- | | **Other: Various different kinds of registries, measure developers,** | |

* 1. Synchronization With Other SDOs / Profilers

|  |  |  |
| --- | --- | --- |
| 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) |

|  |
| --- |
| **Not applicable. This work will not directly involve other SDOs at this time.** |

1. Realm

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

|  |  |  |  |
| --- | --- | --- | --- |
| |  |  | | --- | --- | |  |  | | **US** |

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

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

## Appendix A - Instructions (Delete prior to submitting the completed scope statement)

[Click here](#Project_Name) to return to this section in the template above.

Project Scope Statement Purpose:

This Project Scope Statements is intended for products used outside HL7, such as projects to produce standards or Implementation Guides. **Infrastructure projects** (**the RIM, HL7 maintained vocabulary, wrappers, and methodology**) should also use this scope statement but are not required to complete all sections as noted in the instructions.

The objective of this template is to communicate the type of activities a group is undertaking to achieve specific objectives or to produce specific work products. Project Scopes should provide sufficient information to allow inexperienced individuals to anticipate what a group is working on and decide if they wish to become involved. Project Scope statements should also assist committee chairs to manage the workload of the committee and help to set priorities and recognise inter-dependencies with the work of other committees.

The Steering Divisions, TSC, and other appropriate approval bodies, as defined by the HL7 organization and Project Approval and Initiation Process, review and approve the project request. This includes analysis to avoid project overlaps or dependency gaps. A project not aligned with HL7 strategies established by the HL7 Board, or requiring extensive resources may not be approved. A “hosted” project (funded by an external source) may be approved as long as the sponsors provide adequate resources and the project is not detrimental to HL7 strategy; funding may be in the form of resources or financial support, grants, etc.

**Required Information:**

The HL7 Project Management Office (PMO) will review project statements to ensure the names and descriptions are clear and unambiguous across all projects and that required information is provided so as to obtain project approval.

**Project Insight Note:**

The following instructions indicate how the information in this form is mapped to certain fields in Project Insight’s project description form. The fields are mapped to specific fields in the project description form available in Project Insight: <http://healthlevelseven.projectinsight.net/Login.aspx?ReturnUrl=%2fdefault.aspx>

If you need system login setup for Project Insight, contact the HL7 Director of the Project Management Office at [pmo@hl7.org](mailto:pmo@hl7.org)

**Recommendation for Non-infrastructure Projects:**

The HL7 Product Lifecycle recommends ballots proceed through **Informative 🡪 DSTU 🡪 Normative** phases, however, HL7 policy allows projects to proceed to normative ballot without an Informative or Draft Standard for Trial Use (DSTU) in special circumstances, such as such the need to respond to government mandate or resolve a critical issue raised by a stakeholder or noted in an existing American National Standard. Bypassing the Informative and/or DSTU ballot must be approved by the TSC. Refer to the HL7 Governance and Operations Manual Section 13 – Review Ballot and Section 14 – Normative Ballot for additional information.

1. Project Name and ID [Click here](#Project_Name) to return to this section in the template above.

|  |  |
| --- | --- |
| The name should be concise, based on the objective and unique among all other projects the group takes on. ***Project Insight:*** *Enter into “Name”.* | Project ID: A project ID will be assigned by Project Insight |
| **Product(s):** Indicate the associated Product line(s); check all that apply. Refer to the “Products” tab of the worksheet at the following URL for the definition of the products: <http://www.hl7.org/documentcenter/public/wg/sips/Products&ServicesRevenueMatrix.xls>. Additional information regarding HL7 Products is available at <http://wiki.hl7.org/index.php?title=Product_List_FAQ>.  ***Project Insight:*** *Enter into “Product Type”.* | |

1. Sponsoring Group(s) / Project Team [Click here](#Sponsoring_Group) to return to this section in the template above.

|  |
| --- |
| **Primary Sponsor/Work Group (1 Mandatory):** Some projects are jointly sponsored and the name of all sponsoring Work Groups should be noted. Every project must have at least one project sponsor and a project facilitator; a multi-disciplinary project team is recommended, e.g. domain expert, UML modeling facilitator, HL7 modeling facilitator, requirements process facilitator, data analyst facilitator, business requirement analyst. Sponsorship may be in the form of resources or funding. ***Project Insight:*** *Enter into “Sponsor(s)”.* |
| **Project Facilitator (1 Mandatory):** This is mandatory for all projects and should be the contact person if there are questions about the Project Scope Statement. The Project Facilitator serves as the Project Lead; the 'go to' person for the project who can answer questions regarding status, scope, objectives, issues, risks, etc. regarding the project. ***Project Insight:*** *Enter into “Project Facilitator”.* |
| **Other Interested Parties:** This section should also describe other ‘interested parties’, e.g. anticipated interactions with other committees or other projects. |
| **Facilitators:** Modeling, Publishing, and Vocabulary facilitators are formal roles recognized by HL7, and highly recommended as project participants. If your project has not filled this role, please indicate a contact person for the role, for example, your project may not have a formal vocabulary facilitator but a committee participate has volunteered to serve as liaison with the Vocabulary Committee. Descriptions of these roles and their responsibilities can be found on the HL7 Wiki via PIC's [Find or Be a Volunteer for an HL7 Work Group](../AppData/Local/AppData/Local/Microsoft/Windows/Insync/jadachris00@gmail.com/Health Care/HL7/Working Groups/CQI/AppData/Local/Temp/eM Client temporary files/Documents/Insync/jadachris00@gmail.com/Health Care/HL7/Working Groups/CQI/AppData/Local/Temp/eM Client temporary files/Documents/Insync/jadachris00@gmail.com/AppData/Local/Microsoft/Windows/Temporary Internet Files/Content.Outlook/RJVNRAP6/Descriptions of these roles and their responsibilities can be found on the HL7 Wiki via PIC's Find or Be a Volunteer for an HL7 Work Group (http:/wiki.hl7.org/index.php?title=Category:Volunteer_Wanted_by_HL7_Work_Group)) at <http://wiki.hl7.org/index.php?title=Category:Volunteer_Wanted_by_HL7_Work_Group>. |
| Infrastructure projects, for example, the RIM, HL7 maintained vocabulary, wrappers, and methodology are required to name only the Primary Sponsor and Project Facilitator. |
| **Implementers (2 Mandatory):** If this project will produce a standard, identify at least two implementers who agree to implement a DSTU prior to normative ballot (this is a non-binding agreement). Contact information is mandatory. The intended implementers must be identified at project initiation; however, it is a non-binding agreement. Refer to explanation of Candidate Standard validation below for additional information. ***Project Insight:*** *Enter into “Project Implementers”.* |

Candidate Standard validation

|  |  |
| --- | --- |
| Candidate Standard validation | Executing the Candidate Standard validation approach. HL7 will have a modified open approach to candidate standard validation. All those participants that made a non-binding commitment when the project was initiated will be included if they choose to honor the commitment. Others may be added to achieve a balance or for other necessities for validation. The previous notwithstanding, HL7 will limit the number of participants to ensure a manageable process and reasonable time frame. |
| Candidate Standard validation approach | A project step that ensures that the Candidate Standard is validated by external industry resources before it is finalized as a normative standard. Where the standard is for interoperability, it is expected that the validation will include at least two independent entities (vendors, user organizations, etc.) building trial implementations and testing them together. Where the standard serves another purpose the validation approach will involve a trial effort to use the draft standard in the manner for which it was created.  At the planning stage the entities willing to test must make a non-binding declaration of their intent to participate in validation. Without such a declaration the project should not be initiated.  **Comment:** This is expected to be a significant hurdle for new project initiation. At the same time it helps to assure that HL7 member resources will be concentrated on efforts that have a greater likelihood at industry adoption. |

1. Project Definition [Click here](#Project_Scope) to return to this section in the template above.
   1. Project Scope

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| The detail should be sufficient that an individual with no previous exposure to the group (or even HL7) could understand the expected activities and results. The scope description should also include high level expectations for the project and indicate alignment with market demands or other drivers for the project, such as government mandates, requirements from industry interoperability connectathon, etc. Also include if the project is abandoning or replacing anything, as well as if the deliverables are applicable to multiple realms.  Typically projects to produce standards are routinely supported by the volunteer resources committing to complete the project, and HL7 in the form of meeting rooms, conference call facilities, etc. If additional funding is required, you must provide a budget for the project. A proposed budget is required for any project that will be contracted, for example, website redesign or tooling development.  ***Project Insight:*** *Enter into “Description”.* |

* 1. Project Need

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| --- |
| Explain the reason behind the need for this project. This may be related to legislative requirements, industry needs or similar justifications.  This section must be completed for projects containing items that are expected to be ANSI approved, as it is an ANSI requirement for all ballots. The information will be used in the NIB form.  ***Project Insight:*** *Enter into “Project Need”* |

* 1. Success Criteria

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| --- |
| Indicate the success criteria for the project.  ***Project Insight:*** *Enter into “Succss Criteria”* |

* 1. Project Objectives / Deliverables / Target Dates

[Click here](#Project_Obj_Deliv_TgtDate) to return to this section in the template above.

|  |  |
| --- | --- |
| Enter a list of objectives the project is trying to meet. If the project is to develop one or more work products, the work products’ descriptions should be clear, concise and unambiguous. Work products intended to produce a standard should be in terms of the deliverables:   * new elements methodology (e.g. a new way of deriving message specification from a in information model) * new interface specification for services or application roles * new functional models * new message specification (e.g. a new message structure that refers a the state transitions of a new type of clinical act) * new standard profiles (e.g. CDA implementation guide) * new terminology subsets or mapping * new tools intended to improve productivity and support the methodology   In those cases where the objectives are not work products, they should be described so that an outside observer can answer “yes” or “no” to the question “has this objective been met?”  As the project progresses, objectives and work products can be refined.  Projects that have more than one work product to deliver should list each work product’s expected delivery date, taking into consideration expected dependencies among work products.  ***Project Insight:*** *Enter into “Pjt Objectives and Deliverables ”.* | Target Dates  Exact dates are not needed.  Enter in WGM or ballot cycle format, e.g. : ‘2010 Sept WGM’ or  ‘2010 Jan Ballot’.  Target dates in Project Insight are only provided in the above format.    Target dates can be updated. |

***Example of Objectives / Deliverables / Target Dates:***

[Click here](#Project_Obj_Deliv_TgtDate_Example) to return to this section in the template above.

The following attempts to convey how to identify various objectives /deliverables and their target dates.

|  |  |
| --- | --- |
| **Objective / Deliverable** | **Target Date** |
| Complete analysis, design, draft specification work on Standard XYZ | 2009 Sept Ballot/ WGM |
| Submit for DSTU Ballot | 2010 May Ballot/ WGM |
| DSTU Reconciliation | 2010 May Ballot/ WGM |
| Submit for 2nd DSTU Ballot | 2010 Sept Ballot/ WGM |
| Request TSC Approval for DSTU publication | 2011 Jan Ballot/WGM |
| DSTU Period – 12 months | Jan, 2011 – Jan, 2012 |
| Submit Implementation Guide for Informative Ballot | 2011 Jan Ballot/ WGM |
| Reconcile Informative Ballot | 2011 May Ballot/ WGM |
| Submit Publication Request for Implementation Guide | 2012 Sept Ballot/ WGM |
| Submit Standard XYZ for Normative Ballot | 2012 May Ballot/ WGM |
| Reconcile from Normative Ballot | 2012 Sept Ballot/ WGM |
| Submit Publication Request | 2013 Jan Ballot/ WGM |
| ANSI Approves Standard XYZ | 2013 May Ballot/ WGM |
| Close Project (project end date) | 2013 May Ballot/ WGM |

* 1. Project Requirements

|  |
| --- |
| To support requirements traceability, enter the requirements known at this point in time of the project. Because this document is early in the Project Lifecycle, if requirements are yet to be determined, enter the SPECIFIC URL where they will be documented.  ***Project Insight:*** *Enter into “Pjt Requirements”.* |

* 1. Project Risks

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| --- |
| Identify any known risks at this time. Describe the impact of the risk and the level of probability and severity. Lastly, document the mitigation plan. Probability is the likelihood that the risk will occur. Severity is the effect that a risk will have on the project if it occurs. |

* 1. Project Dependencies

|  |
| --- |
| This section is not required for Infrastructure Projects.  The dependency may be the work of another project undertaken by this group or by another group. Anticipating dependencies can allow groups to coordinate their effort to ensure the overall objectives of HL7 can be met. An example of a dependency is: The CDA ballot needed the Data Types produced by Infrastructure and Management Project to be through ballot before the CDA ballot could be finalised.  ***Project Insight:*** *Enter into “Pjt Dependencies”.* |

* 1. Project Document Repository Location.

|  |
| --- |
| Indicate where can one go to find deliverables/documents created by the project team by entering **the EXACT URL(s)** where one can go to find deliverables, documents, artefacts created by the project team for this project. The URL could point to the HL7 Wiki, TSC Wiki, GForge, Project Insight, etc. A template to create a Project Page on the HL7 Wiki is available at: <http://wiki.hl7.org/index.php?title=Template:Project_Page>  ***Project Insight:*** *Enter into “Project Document Repository”.* |

* 1. Backward Compatibility.

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| --- |
| Indicate the backward compatibility of the expected project artefacts/deliverables, if known.  ***Project Insight:*** *Enter into “Backward Compatibility”; enter additional information into ‘Misc. Notes’..* |

1. Products [Click here](#Product) to return to this section in the template above.

|  |
| --- |
| **Product(s):** Indicate the associated Product line(s); check all that apply. Additional information regarding HL7 Products is available at www.HL7.org > Standards > [Introduction](http://www.hl7.org/implement/standards/index.cfm?ref=nav). For additional information on creating or modifying HL7 processes, refer to the document at Home > Resources > Procedures > [Introducing New Processes to HL7](http://gforge.hl7.org/gf/project/psc/docman/?action=DocmanFileEdit&id=7225)  ***Project Insight:*** *Enter into “Product Type”.* |

1. Project Intent [Click here](#Project_Intent) to return to this section in the template above.

|  |
| --- |
| Indicate if/how this project affects a standard or HL7 policy/procedure/process.  If a project is withdrawing an informative document, additional information can be found in the GOM Section 13; information regarding withdrawal of an HL7 American National Standard can be found in GOM Section 15. If a project is adopting/endorsing an externally developed Implementation Guide, additional information can be found in the GOM Section 18. The GOM is available at: <http://www.hl7.org/documentcenter/public/membership/HL7_Governance_and_Operations_Manual.pdf>).  ***Project Insight:*** *Enter into “Project Intent”.* |

* 1. Ballot Type

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| If applicable, indicate the type of balloting the deliverables will go through. Additional information in determining the correct ballot strategy can be found in the [Technical Steering Committee (TSC) Guidance on Ballot Levels](http://gforge.hl7.org/gf/project/psc/docman/?subdir=421) located in Gforge > Projects > Project Services > Docs > Ballot Guidance.  ***Project Insight:*** *Select a value from the “Type” dropdown.* |

* 1. Joint Copyright

|  |
| --- |
| 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 to for the PSS to receive TSC approval.  ***Project Insight:*** *Enter into “Joint Copyright”.* |

1. Project Approval Dates [Click here](#Project_Approval_Dates) to return to this section in the template above

|  |
| --- |
| Note that the SD and TSC Approval dates don’t need to be captured in this template; this section simply reminds project facilitators about the need to gather SD and TSC approval. SD/TSC approval dates will be entered into Project Insight as they occur.  **Work Group Approval Date:** The date the sponsor’s Work Group approved the project.  ***Project Insight:*** *Enter into “Start Date”.*  **SD Approval Date:** The date the sponsor’s Steering Division approved the project. ***Project Insight:*** *Enter into “SD Approval Date”.*  The "PBS Metrics Reviewed?" checkbox is a reminder for the Steering Divisions to look at the Work Group’s PBS Metrics during their SD review process to insure that the Work Group has the bandwidth to take on additional project work.  **PBS Metrics Reviewed? (required for SD Approval):**  Additional information regarding this task can be found via [www.HL7.org](http://www.HL7.org) > Resources > Tools and Resources > Project Management and Tracking Tools > [PBS Metric Guidance for Steering Division Co-Chairs](http://www.hl7.org/documentcenter/public_temp_110C547D-1C23-BA17-0C85072D597107E3/wg/projectServices/PBSMetricGuidanceforSDCoChairsFinal.doc)  **TSC Approval Date:** The date the Technical Steering Committee approved the project. ***Project Insight:*** *Enter into “TSC Approval Date”.*  **Joint Copyright Letter of Agreement received? (req'd for Joint Copyrighted material):**  When the Joint Copyright box is checked, a Joint Copyright Letter of Agreement must be submitted to the TSC in order for the PSS to receive TSC approval. |

1. External Project Collaboration [Click here](#External_Project_Collaboration) to return to this section in the template above.

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| --- |
| Include SDOs or other external entities you are collaborating with, including government agencies. Indicate the nature and status of the Memorandum of Understanding (MOU) if applicable.  Agreement Status: Memorandum of Understanding (MOU) or Associate Charter Status types are: Negotiating or signed (please indicate the date signed.) Leave blank if there is no agreement in place. Refer to <http://www.hl7.org/about/agreements.cfm> for a current listing of HL7’s MOU agreements.  ***Project Insight:*** *Enter into “Collaboration Efforts”.* |

* 1. Stakeholders / Customers / Providers

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| --- |
| This section must be completed for projects containing items that are expected to be ANSI approved, as it is an ANSI requirement for all ballots. The information will be used in the NIB form.  Indicate the associated stakeholders, customers and providers for which this project is intended. Check all that apply.  ***Project Insight:*** *Enter into “Stakeholders / Customers / Providers”; enter additional information into ‘Misc. Notes’.* |

* 1. Synchronization With Other SDOs / Profilers [Click here](#Synchro_SDO_Profilers) to return to this section in the template above.

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| --- |
| Indicate the existence, or absence, of related implementation guides or standards with the appropriate SDO/Profiler. The list here includes those that HL7 has an agreement with as listed via www.HL7.org > About HL7 > [Agreements](http://www.hl7.org/about/agreements.cfm?ref=nav).  The main goal of this section is to get to get clarity on potential conflicts with other SDO/Profiler deliverables that we can address at the time of project definition. Also, we want to avoid confusion for stakeholders that have to deal not only with HL7 but also other SDO/Profiler deliverables. An example of this is the development of implementation guides where we want to make sure that it is done jointly with, say, IHE, or that it is clearly stated in this section why the proposed IG is different from similar IGs.  ***Project Insight:*** *Enter into “Synchronization With Other SDOs / Profilers”; enter additional information into ‘Misc. Notes’.* |

1. Realm [Click here](#Realm) to return to this section in the template above.

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| --- |
| Indicate whether the project is applicable globally (universal), or intended for a specific country or region (realm). Note that Non-US realm project scope statements should be directed to the appropriate HL7 Affiliate.  Projects meeting one or more of the following guidelines are candidates for being universal realm projects.   * Stakeholders representing 2 Realms at a minimum, where stakeholder should be interpreted as a specific group or organization listed in the External Project Collaboration section or the Stakeholders / Vendors / Providers section of the project scope statement * Requirements coming from a minimum of 2 Realms * Project will be implemented in a minimum of 2 Realms * Minimum of 2 Realms represented on project team   Also note that if the Realm changes from ‘Realm Specfic’ to ‘Universal’ additional project resources may be necessary to support that change. This is considered a ‘significant’ or ‘major’ change and should go through the project approval process as a Universal Realm project.  If applicable, check the box to indicate that the standard balloted or was previously approved as realm specific standard.  For projects producing both universal and realm specific deliverables, document those details here (specify which deliverables are Universal and which are Realm Specific).  *Project Insight: Enter into “Realm” and “HL7 Affiliate” (if applicable).* |

1. Strategic Initiative Reference [Click here](#Roadmap_Reference) to return to this section in the template above.

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| This section is for Internal Use Only. The HL7 PMO and/or the TSC will assist in determining if a project is a Strategic Initiative project, and if so, will identify which Strategic Initiative the project aligns with. For more detail regarding the HL7 Strategic Initiatives, go to: <http://www.hl7.org/documentcomments/index.cfm>  ***Project Insight:*** *Enter into “Strategic Initiatives Reference”* |

## Appendix B - Project Approval

[Click here](#Project_Name) to return to this section in the template above.

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| Every project scope statement must follow the appropriate review/approval process based on its project sponsor:   * Work Group * TSC * Marketing or Board Committee * Board of Directors or a Contract project * International Council * HL7 Affiliate   Documentation detailing these processes is located at:  [www.HL7.org](http://www.HL7.org) > Participate > Templates > Project Scope Statement and Project Approval Process or directly at the permalink <http://www.hl7.org/participate/templates.cfm?ref=nav>. |

## Appendix C – Frequently Asked Questions

[Click here](#Project_Name) to return to this section in the template above.

**Q: What is the definition of a project?**

Answer:

From the HL7 Development Framework, Section 2.2.1, HL7 Work Effort:

An HL7 work effort represents an activity being undertaken by an existing Work Group or Board appointed committee to achieve specific objectives or to produce specific work products.

A Work Group shall consider a work effort to be a project if one or more of the following is true of that work effort:

• involves a group outside of HL7 (may require Board approval)

• requires external funding (may require Board approval)

• is going to be balloted

• requires cross-committee participation

• is determined to be a project by the committee

An HL7 project:

• has an objective (statement of what is going to be produced),

• will have a finite existence (the end date to be determined by the resources available and the start date), and

• if additional funding is required, it will have a budget (including resources and funding sources)

• will have at least one participant available to contribute and must have a project leader, if only an interim to get the project started

• will have at least two implementers (unless the project is intended to support the HL7 infrastructure)

• will have an estimated schedule

Project Management Institute’s PMBOK Guide and the publication “The Fast Forward MBA in Project Management” indicate the following:

Typically, a project is a temporary endeavor undertaken to create a unique product or service.  All projects have two essential characteristics.  (1) Every project has a beginning and an end. (2) Every project produces a unique product. HL7 also recognizes ‘Maintenance’ projects which usually repeat on an annual basis; these maintenance projects do not need to be re-submitted or have a definite end date.

Temporary means that every project has a definite beginning and a definite end.  Temporary does not necessarily mean short in duration, it just means that projects are not ongoing efforts.  Furthermore, projects involve something that has not been done before and which is, therefore, unique.

Projects shouldn’t be confused with ongoing operations.  Ongoing operations have the opposite characteristics of projects in that they have no defined end and they produce similar, often identical, products.  Examples of ongoing operations are (a) an insurance company processes thousands of claims every day; (b) a bank teller serves over 100 customers daily, providing a few dozen specific services.

The objective of a project is to attain the objective and close the project.  The objective of an ongoing operation is typically to sustain the business.

**Q: Do I need to create a Project Scope Statement if my project isn’t going through the ballot process?**

A: Yes, all projects need to have a Project Scope Statement completed and submitted to the HL7 PMO. A lot of work done by Education, Marketing, Electronic Services, ArB, PIC, etc. does not need to go through the ballot process, however, visibility of that work is necessary. Project Scope Statements are the foundation for communicating project information. They also serve as a tool for Project Facilitators to gather the right information to begin a project as well as track the project’s progress.

**Q: Do I need to create separate Project Scope Statements for each Implementation Guide or other support documents?**

A: A single PSS can indicate multiple deliverables for the standard being addressed, so, no, a separate PSS does not need to be created for each Implementation Guide or support document for that standard. Simply identify all of the Implementation Guides and documents in the Project Objectives and Deliverables section that are to be produced for the project.

**Q: The scope or objective of my project changed. Do I need to create a new PSS?**

A: You may or may not have to as it depends on the change. Oftentimes, the scope or objectives of a project may change during its lifecycle, perhaps due to regulatory changes or tying back to a different standard. . When the scope changes, it is preferred that a new Project Scope Statement NOT be created. By keeping the same Project ID, the ballot site can readily point the same project ID to both DSTU and Normative ballots.

If the change in scope or objectives is minor, simply update the existing project scope statement, and within Project Insight, indicate the modifications in the appropriate fields. You can also use the ‘Misc. Notes’ text box for documentation.

However, if the change in scope or objectives is major, the Project Facilitator should submit a new Project Scope Statement, as many of the original information won’t accurately reflect what is being done anymore.

**Q: What defines a ‘major’ or ‘significant’ change in scope?**

A: Since ‘major’ and ‘significant’ are subjective terms, examples may provide better comprehension of a “major” or “significant” change to a project scope statement.

A “major” or “significant change” in project scope is when the impact is that:

* Creating a new Release of a Standard
* The Project End date extends by 12+ months
* Additional HL7 funds are required
* The Project Intent changes (i.e. the project changes from “Revising a Standard” to “Creating a Standard”)
* The change in scope will result in an item that qualifies as ‘substantive change’ as defined in GOM Section 14.08.04.
* The Ballot Type changes to a Normative (i.e. the project changes from planning for an Informative ballot to a Normative ballot)
* The Realm changes from ‘Realm Specific’ to ‘Universal’ (since additional project resources may be necessary to support that change)
* The deliverable’s backwards compatibility changes from ‘Yes’ to ‘No’

**Q: Do I need to include budget figures in my scope?**

A: Typically projects to produce standards are routinely supported by the volunteer resources committing to complete the project, and HL7 in the form of meeting rooms, conference call facilities, etc. If additional funding is required from HL7, you must provide a budget for the project. A proposed budget is required for any project that will be contracted, for example, website redesign.

**Q: I’ve submitted my PSS to my Steering Division for approval but haven’t heard anything from them. What should I do?**

A: First, check the Steering Division’s meeting minutes. Look to see if your project was on one of their agendas, and if so, if it was approved or the SD had further questions. Your first point of contact with the SD should be their Project Facilitator. If you can’t contact them, contact the Steering Division Representative and Alternate.

If the SD has approved your project, they will submit it to the TSC for approval via GForge’s tracker system. To view which approvals your project has gathered, find your project by using the Searchable Project Database (http://www.hl7.org/special/Committees/projman/searchableProjectIndex.cfm), located on the www.HL7.org Homepage).

**Q: Do I need to update the PSS if I discover after it’s approved that I need to coordinate ballots with other HL7 Work Groups?**

A: Yes, we recommend updating the Ballot Strategy section of the Project Scope Statement as well as Project Insight. Include the ballot name and release/version your project is coordinating with.

**Q: When reaffirming a standard, does a PSS need to be created and go through the review/approval process?**

A: Yes. Reaffirmation of a standard requires a normative ballot.

**Q: When withdrawing a published standard or a standard that has gone through balloting, does a PSS need to be created and go through the review/approval process?**

A: In most cases, a PSS is not required. However a [Notice of Withdrawal of Proposed ANS](http://www.hl7.org/permalink/?WithdrawANS) form must be completed and submitted to the TSC, following GOM Section 14.14. This form can be found via www.HL7.org > Resources > Templates > [Notice of Withdrawal of Proposed ANS](http://www.hl7.org/permalink/?WithdrawANS).

In this case ‘withdrawing a standard’ refers to many things, such as choosing not to extend a standard that has reached its 5 year end-of-life or identifying the need to sunset a standard.

A PSS does need to be created if the standard being withdrawn is intertwined/intermingled with other standards. The PSS provides visibility so dependencies in other standards can be changed.

**Q: Should a Work Group create a new PSS when creating a new Release of a Standard?**

A: Yes, in all cases, a new PSS should be created whenever work on a new Release of a Standard is being done. Do not modify the PSS that refers to a prior Release. In most all cases, there will be a significant enough change in the newer Release of the Standard to warrant a new PSS. Also, a new PSS helps for tracking and historical purposes, as a new PSS assists HQ in keeping a one-to-one relationship of standards to projects.

**Q: How do I know the approval status of my project?**

A: Look up your project using the Searchable Project Database (http://www.hl7.org/special/Committees/projman/searchableProjectIndex.cfm), located on the www.HL7.org Homepage). The search results will reflect SD and TSC approval statuses either by reflecting the date the group approved the project or indicated ‘Awaiting Approval’ if the group has not approved the project.

**Q: What approvals are needed if I revise my existing PSS, say the project’s scope changes?**

A: The same approval process should be followed whether it’s a new project or a scope change to an existing project.

When the scope is changed in a project, the modified Project Scope Statement will be approved by the primary WG and the SD, providing the TSC using the same time line and deadlines as submissions for new projects. When the scope changes, it is recommended that a new Project Scope Statement NOT be created. By keeping the same Project ID, the ballot site can readily point the same project ID to both DSTU and Normative ballots.

Best practice: Use Microsoft Word’s ‘Track Changes’ tool to highlight the changes being made to the Project Scope Statement.

**Q: What ballot types are required to go through the project approval process?**

A: All ballot types (Comment Only, Informative, Normative, DSTU) need to go through the project approval process, however, as identified in the Project Scope Statement, a single project can define ballot plans for multiple types of ballots for the project, for example, Comment Only >DSTU > Normative or Informative > Normative.

**Q: Do I need to go through the project approval process if a standard has expired and will not be reaffirmed?**

A: No. When a work group has balloted a standard at DSTU, informative, or normative ballot, and decides the standard will be withdrawn, the withdrawal form at www.HL7.org > Resources > Templates > [Notice of Withdrawal of Proposed ANS Template](http://www.hl7.org/documentcenter/public/membership/ANSI_proposal_withdrawal.doc) is needed for ANSI notification and must be approved by the Work Group and then submitted to and approved by the TSC.

**Q: What is the approval process for HL7 projects that collaborate with ISO or the JIC?**

A: Follow the process documented on via www.HL7.org > Participate > Balloting > [HL7's Collaboration with ISO and JIC](http://www.hl7.org/participate/isojic.cfm) .

**Q: Do I need additional approvals when creating or modifying an HL7 Policy/Procedure/Process?**

A: Yes. Work Groups should also have the Architectural Review Board review/approve the PSS. Work Groups should include the ArB when sending the PSS to their Steering Division for review/approval. For additional information on creating or modifying HL7 processes, refer to the document [Introducing New Processes to HL7](http://gforge.hl7.org/gf/project/psc/docman/?action=DocmanFileEdit&id=7225) (balloting as Comment Only in the Jan 2012 cycle; will be published after that).

**Q: How should a Work Group document the voting results after seeking approval for the PSS?**

A: The ideal way is to post it in meeting minutes, so that they are documented and easily referenced. If that’s not possible, an email to the Listserv will suffice.

**Q: Define ‘task’ and ‘activity’ as related to project management.**

A: Theoretically, ‘activity’ is the action verb within a ‘task’. However, for HL7 projects, ‘task’ and ‘activity’ can be considered synonymous terms.

Task/activities should be:

* Specific - a single, well defined, discrete activity. The 8/80 is a good guideline -- no task should be smaller than 8 hours or larger than 80 hours.
* Achievable - it should be something that can be done as a single deliverable and can be defined as being completed or done such as a document being produced.
* Measurable - it should be an activity that can be measured such as a deliverable produced, an elapsed period of time or number of iterations

**Q: How should a Work Group document annual work/maintenance within Project Insight?**

A: A project entry should be opened in Project Insight indicating the annual work and the respective years. This project should have a Project Status of ‘3 Year Plan Item’; note that a Project Scope Statement isn’t needed for this entry because it’s a 3 Year Plan item and only high level information is necessary. This project can then remain ‘as-is’, or modified so it indicates accurate future years.

When the Work Group actually begins the annual work, they should complete a PSS indicating the scope of work involved and gather the necessary approvals for the PSS. A new project in Project Insight will be created (and will have a Project Status of ‘Active Project’). Once the scope of work has been completed for this project, it will be closed/archived.

Hence, the 3-Year Plan project always remains open; the ‘Active Project’ PSS will be the project reflecting the specific annual maintenance being done.

An example of the above situation can be found for Project Service’s annual updates to the PSS Template. Project 531 is the 3YP entry indicating the need for the work in 2010, 2011, 2012, 2013 and beyond. Project 581 was created to identify the specific work that would be done for the 2010 updated template. In January, 2010, project 581 was closed because the new PSS template was released to membership, however project 531 was modified to remove references to ‘2010’ and remains open to indicate the need for the work each year.

**Q: Should a project remain open/active during its DSTU Test Period?**

A: Yes, it should. This means that the project will continue to show up in the Searchable Project Database and on Project Insight reports.

**Q: Why was I asked to Disable or Enable a macro when I opened this document?**

A: This document contains a macro that, when run by the user, removes the green ‘help’ text within the template portion of this document and provides a cleaner version of their project scope statement. To run the macro, select Tools > Macro > Macros… > Run.

Note that the macro will NOT remove the Appendices; the user must remove the Appendix verbiage on their own.

**Q: How do I search/view HL7 Projects?**

A: There are three ways to view HL7 projects, all located at www.HL7.org > Participate > Tools and Resources > Project Management and Tracking Tools

(http://www.hl7.org/participate/toolsandresources.cfm):

1. The Searchable Project Database (http://www.hl7.org/special/Committees/projman/searchableProjectIndex.cfm, located on the www.HL7.org Homepage and titled ‘Search current projects from Project Insight)

2. An Excel spreadsheet of all HL7 projects is available via GForge > TSC File tab (http://gforge.hl7.org/gf/).

3. Project Insight (a Project Insight User ID and Password is required – this differs from your HL7 User ID and Password). Contact the HL7 PMO for more information (pmo@hl7.org). The URL is: http://healthlevelseven.projectinsight.net/l.aspx?ReturnUrl=%2fdefault.aspx.

**Q: Where can I find the Project Scope Statement Template?**

A: The most recent version of the Project Scope Statement Template (MS Word document) is located at www.HL7.org > Participate > Templates (http://www.hl7.org/participate/templates.cfm).

**Q: Where can I find the list of Steering Division Leaders or Steering Division Project Facilitators?**

A: Current Steering Division leaders can be found via their Steering Division webpage at <http://www.hl7.org/Special/committees/index.cfm>. Current Steering Division Project Facilitators can be found via a PDF file at www.HL7.org > About > People and Organizations > HL7 Facilitators (<http://www.hl7.org/About/hl7facilitators.cfm>).

**Q: Do I need to specify a Reference Information Model (RIM) version in the V3 standard I am developing?**

A: Unless specified, it is assumed that a project incorporates the current version of HL7 infrastructure (RIM, Datatypes and Vocabulary).

Project Services recommends that your Work Group’s modeling facilitator monitor proposed RIM changes that may impact the standards you are developing for the duration of your project. The modeling facilitator can do this by subscribing to the harmonization@lists.hl7.org listerv. For more information on RIM change proposals, contact the MnM Work Group.

**Q: What do I need to do if I want a project document to be publically available outside of HL7?**

A: It’s a rare instance that a project will create and distribute a public document in accordance to the GOM’s ruling.  In the instance that a project deliverable does adhere to it, the project team will need to present a proposal to the Executive Committee to provide funding to create and distribute a document publicly.  GOM Sections 09.01(d) and 16.01 indicate that the Executive Committee determines what is publically available. More information can be found at: <http://www.hl7.org/documentcenter/public/membership/HL7_Governance_and_Operations_Manual.pdf>.

**Q: Why can’t I turn Track Changes on within this document?**

A: In order for the checkboxes to work smoothly, this document has been ‘protected’. To use Track Changes, turn off the protection by clicking on: (pre- MS Word 2007) Tools > Unprotect Document or (MS Word 2007 and higher) Review > Protect Document. Note that by unprotecting this document, when checking a Checkbox, a window will pop up and you’ll want to select the ‘Default Value’ radio button ‘Checked’.

**Q: I'm leading a project that will create FHIR Resources and/or FHIR Extensions. How should I proceed?**

A: You should use the FHIR PSS template to initiate your project. The FHIR PSS template is located in the zip file along with the HL7 PSS templates, but is tailored to support FHIR related projects.