

PSS Form Review - Static

1. Project Name and ID

| | | | | | | | | |
|---|---|--|--|--|-----------------------|------|--------|------|
| Enter the name of the project here: <insert name> | | | | | | | | |
| Project ID: | An ID will be assigned by Project Insight | | | | | | | |
| Complete this section for all "Direct to Normative" ballot projects and when a project proceeds from "Informative to Normative" or "STU to Normative". | | | | | | | | |
| Forward PSS to the TSC (via tscpm@HL7.org); this triggers American National Standards Institute (ANSI) Project Initiation Notification (PINS) submission. | | | | | | | | |
| | TSC Notification: Informative/STU to Normative | | | | Date: Submission date | | | |
| | - or - Direct to Normative (no STU) (includes reaffirmations) | | | | | | | |
| Identify ISO, IEC or ISO/IEC standard to be adopted in text box below | | | | | | | | |
| Enter info here if an ISO, IEC, or ISO/IEC Standard is to be adopted as an American National Standard; Enter the designation of the standard(s) to be adopted: | | | | | | | | |
| Includes text from ISO, IEC or ISO/IEC standard: Check here if this standard includes excerpted text from one or more ISO, IEC or ISO/IEC standards, but is not an identical or modified adoption. | | | | | Yes | No | | |
| Select the unit of measure used in the standard; if no measurements are in the standard, select N/A | | | | | N/A | U.S. | Metric | Both |
| | Investigative Project (aka PSS-Lite) | | | | Date : | | | |
| Check this box when the project is investigative or exploratory in nature, which allows limited project scope definition. Sections 1-Project Name, 2-Sponsoring Group(s)/Project Team, 3a-Project Scope, 3b-Project Need, 3e-Project Objectives/Deliverables/Target Dates, 3i-Project Document Repository, 6b-[Realm, if known], and 6d-[applicable Approval Dates] are required for Investigative Project. Investigative Project specific instructions are highlighted in yellow. An investigative project must advance in two WGM cycles, requiring a full scope statement. Otherwise the project will be closed. | | | | | | | | |

2. Sponsoring Group(s) / Project Team

2.a. Primary Sponsor/Work Group

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

2.b. 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 | Monthly review |
| | Other Involvement. Specify details here: | |

2.c. Project Team

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

| | |
|---|--|
| Project facilitator (1Mandatory) | |
| Other interested parties and their roles | |
| Multi-disciplinary project team (recommended) | |
| Modeling facilitator | |
| Publishing facilitator | |
| Vocabulary facilitator | |
| Domain expert rep | |
| Business requirement analyst | |
| Conformance facilitator (for IG projects) | |

| | |
|--|--|
| Other facilitators (SOA, etc) | |
| Implementers (2Mandatory 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) | |
| 2) | |

3. Project Definition

3.a. Project Scope

Describe the project; include what is expected to be accomplished/delivered along with specified features and functions. Include whether the deliverable(s) are universal, realm specific or applicable to various realms. Be sure to spell out all acronyms as these are carried forward to the NIB (Notice of Intent to Ballot) for ballot announcements..

3.b. Project Need

This information is required by ANSI for all ballots. Briefly explain the reason behind the need for this project. This may be related to legislative requirements, industry need, or similar justifications.

3.c. Security Risks

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 the Cookbook for Security Considerations for additional guidance, including sample spreadsheets that may be used to conduct the security risk assessment.

| |
|---------|
| Yes |
| No |
| Unknown |

3.d. External Drivers

Describe any external schedules or calendars which may not be known outside of the project team that are driving target dates for this project..

3.e. Project Objectives / Deliverables / Target Dates

| | |
|--|---|
| <p>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).</p> | <p>Target Date (in WGM or ballot cycle format, e.g. '2017 Sept WGM' or '2017 Jan Ballot')</p> |
| <p>Enter objective/deliverable here.</p> <p>All planned ballots and their target dates should be included</p> <p>The example below is a "STU to Normative" path</p> | <p>Enter Target Date</p> |
| <p>Example: Submit for STU Ballot(First Ballot Cycle)</p> | <p>2018 Jan Ballot</p> |
| <p>Example: Complete STU Reconciliation</p> | <p>2018 May WGM</p> |
| <p>Example: Submit for 2nd STU Ballot</p> | <p>2018 May Ballot</p> |
| <p>Example: Request STU Publication</p> | <p>2018 Sep WGM</p> |
| <p>Example: STU Period – 12 months</p> | <p>2019 Jan - 2015 Jan</p> |
| <p>Example: Submit for Normative Ballot</p> | <p>2019 May Ballot</p> |
| <p>Example: Complete Normative Reconciliation</p> | <p>2019 Sep WGM</p> |
| <p>Example: Submit Publication Request</p> | <p>2019 Oct</p> |
| <p>Example: Receive ANSI Approval</p> | <p>2020 Nov</p> |
| <p>Project End Date (all objectives have been met)</p> <p>Note: For PSS-Lite/Investigative Project, End date must be no more than two WGM cycles, e.g. project initiated at January WGM must complete investigation by September WGM.</p> | <p>Enter Project End Date</p> |

3.f. Common Names / Keywords / Aliases

What common name does your group use to refer to the product(s) produced? What alternative names, aliases and keywords does your group use to refer to the product(s) that will be produced? Some examples: C-CDA, LRI, eDOS.

3.g. Lineage

If your project creates a Post-Release 1 version; indicate the name of the prior product and if it is supplanting, replacing or coexisting with a previous release:

3.h. Project Dependencies

Enter any dependencies or the name & Project Insight ID of project(s) that this project is dependent upon to achieve its objectives:

Projects and their Project Insight IDs can be found via <http://www.hl7.org/special/Committees/projman/searchableProjectIndex.cfm?ref=common>

3.i. HL7-Managed Project Document Repository Location

Projects must adhere to the [TSC's guidelines](#) (which were approved on 2016-04-04 and summarized in [Appendix A](#)).

A template to create a Project Page on the HL7 Wiki is available at: http://wiki.hl7.org/index.php?title=Template:Project_Page.

Enter the SPECIFIC URL of the HL7-MANAGED SITE where supporting project documents, deliverables, ballot reconciliation work and other project information will be kept.

HTTP://

3.j. Backwards Compatibility

| | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Are the items being produced by this project backward compatible? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If you check 'Yes' please indicate the earliest prior release and/or version to which the compatibility applies: | | | | | |
| | | | | | |
| For V3, are you using the current data types? (Refer to TSC position statement on new projects using R2B for more information on the current V3 data types) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If you check no, please explain the reason: | | | | | |
| If desired, enter additional information regarding Backwards Compatibility. | | | | | |

3.k. External Vocabularies

| | | | | | |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Will this project include/reference external vocabularies? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| If Yes, please enter the vocabularies: | | | | | |

4. Products (check all that apply)

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

If you checked New Product Definition or New Product Family, please define below:

For FHIR IGs and FHIR Profiles, what product version(s) will the profiles apply to?

5. Project Intent (check all that apply)

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

If revising a current standard, indicate the following:

- Name of the standard being revised:
- Date it was published (or request for publication, or ANSI designation date)
- Rationale for revision
- The relationship between the new standard and the current standard (is it designed to replace the current standard, a supplement to the current standard, etc.)

5.a. Ballot Type (check all that apply)

| | | | |
|--------------------------|--|--------------------------|---------------------------------------|
| <input type="checkbox"/> | Comment (aka Comment-Only) | <input type="checkbox"/> | Joint Ballot (with other SDOs) |
| <input type="checkbox"/> | Informative | <input type="checkbox"/> | N/A (project won't go through ballot) |
| <input type="checkbox"/> | STU to Normative - OR - <input type="checkbox"/> | <input type="checkbox"/> | Normative (no STU) |

If necessary, add any additional ballot information here. If artifacts will be jointly balloted with other SDOs, list the other groups.

5.b. 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 for the PSS to receive TSC approval.

Joint Copyrighted Material will be produced? Yes No

6. Project Logistics

6.a. External Project Collaboration

Include SDOs or other external entities you are collaborating with, including government agencies as well as any industry outreach. Indicate the nature and status of the Memorandum of Understanding (MOU) if applicable.

For projects that have some of their content already developed:

| | | | |
|--|--|-----|----|
| How much content for this project is already developed? | | | |
| Was the content externally developed ? : | | | |
| Is this a hosted (externally funded) project? (not asking for amount just if funded) | | Yes | No |

6.b. Realm

| | | |
|--|--------|--|
| Un ive rs al | - OR - | Realm Specific |
| | | Check here if this standard balloted or was previously approved as realm specific standard |
| <p>Enter "U.S." or name of HL7 affiliate(s) here. Provide explanation/justification of realm selection. For projects producing deliverables applicable to multiple realms, document those details here.</p> <p>For Investigative projects, indicate if the project is planned to be Realm Specific or Universal, if known. Work Groups are encouraged designating project a Universal project initially, and discover which Realms can contribute to the work effort during the discovery phase of the project. Note: This status is subject to change during the investigative process.</p> | | |

6.c. 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

| 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 | |
| <p>Other: Indicate other stakeholders, vendors or providers not listed above.</p> | | |

6.d. Project Approval Dates

Click here to go to [HL7 Project Scope Statement Instructions#Appendix A](#) for more information regarding this section. Approvals are by simple majority vote of the approving body

| | |
|---|--|
| Sponsoring Work Group Approval Date: | WG Approval Date |
| Administrative review – in parallel with Work Group Approval | |
| Co-Sponsor Group Approval Date | List each Co-Sponsor and their Approval Date |
| Family Management Group Approval Date(s) | |
| CIMI Projects: CIMI Management Group | CIMI MG Approval Date |

| | | | | | | | | | | | | | | | | |
|--|--|--------------------------|--|--------------------------|--------------------------|--------------------------|--------|--------------------------|-----|---|--------------------------|-----|--------------------------|----|--|--|
| CDA Projects: CDA Management Group | CDA MG Approval Date | | | | | | | | | | | | | | | |
| FHIR Projects: FHIR Management Group | FMG Approval Date | | | | | | | | | | | | | | | |
| V2/Publishing Projects: V2 Management Group | V2 MG Approval Date | | | | | | | | | | | | | | | |
| US Realm Projects: US Realm Steering Committee Approval (Email WG approved PSS to: tscpm@HL7.org) | USRSC Approval Date | | | | | | | | | | | | | | | |
| Affiliate Specific Projects: Affiliate Approval Date | Affiliate Approval Date | | | | | | | | | | | | | | | |
| Submit PSS to Steering Division after all of the above approvals are received | | | | | | | | | | | | | | | | |
| Steering Division (of Primary Sponsor WG) Approval Date: | SD Approval Date CCYY-MM-DD | | | | | | | | | | | | | | | |
| <table border="1"> <tr> <td>Last PBS Metrics Score:</td> <td><input type="checkbox"/></td> <td>Green</td> <td><input type="checkbox"/></td> <td>Yellow</td> <td><input type="checkbox"/></td> <td>Red</td> </tr> <tr> <td>PBS Metrics Reviewed? (required for SD Approval if not green)</td> <td><input type="checkbox"/></td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> <td></td> <td></td> </tr> </table> | | | Last PBS Metrics Score : | <input type="checkbox"/> | Green | <input type="checkbox"/> | Yellow | <input type="checkbox"/> | Red | PBS Metrics Reviewed? (required for SD Approval if not green) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No | | |
| Last PBS Metrics Score : | <input type="checkbox"/> | Green | <input type="checkbox"/> | Yellow | <input type="checkbox"/> | Red | | | | | | | | | | |
| PBS Metrics Reviewed? (required for SD Approval if not green) | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No | | | | | | | | | | | | |
| ARB and Steering Division approval may be in parallel | | | | | | | | | | | | | | | | |
| Architectural Review Board Approval Date: (required for externally developed content) | ARB Approval Date | | | | | | | | | | | | | | | |
| TSC Approval | | | | | | | | | | | | | | | | |
| If applicable, TSC has received a Joint Copyright/Distribution Agreement (containing the verbiage outlined within the SOU), signed by both parties. | <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Yes</td> <td><input type="checkbox"/></td> <td>No</td> <td><input type="checkbox"/></td> <td>N/A</td> </tr> </table> | <input type="checkbox"/> | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> | N/A | | | | | | | | | |
| <input type="checkbox"/> | Yes | <input type="checkbox"/> | No | <input type="checkbox"/> | N/A | | | | | | | | | | | |
| Technical Steering Committee Approval Date: (Email SD WG approved PSS to: tscpm@HL7.org) | TSC Approval Date | | | | | | | | | | | | | | | |