

NCPDP PROJECT DEVELOPMENT STEPS

A GUIDE TO SUBMITTING A PROJECT DEVELOPMENT FORM

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Project Development Steps

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NCPDP recognizes the confidentiality of certain information exchanged electronically through the use of its standards. Users should be familiar with the federal, state, and local laws, regulations and codes requiring confidentiality of this information and should utilize the standards accordingly.

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What Is A Project

A project is an idea that a NCPDP participant feels the membership should undertake. Examples of a project are as follows:

- A new business transaction or application for the membership to explore.
- A perceived need for NCPDP to define roles, responsibilities, and standards in a new arena that benefits the pharmacy services sector of the health care industry.
- To define a code set for the pharmacy services sector of the health care industry.

Projects are not changes that are requested through the established Data Element Request Form (DERF) process. The DERF process exists to request additions or changes to existing standards by modifications to existing fields or the addition of new fields or code values.

A project is accepted by the NCPDP members once the Standardization Co-Chairs, the Maintenance and Control members, and the Board of Trustees have approved the project. Approval of the project means these groups are asking an existing or new Work Group to put the project on their agenda for discussion. The Work Group will then discuss the project and determine if they approve of the project. Approval means the work of analysis, discussion, and documentation will begin as appropriate.

The Work Group will then determine a course of action and make recommendations. Actions by the Work Group could be:

- The development of white papers.
- Submission of Data Element Request Form (DERF) for changes to the existing standards and implementation guides.
- Creation of a Task Group.
- Creation of a new standard or implementation guide.

It is important for the submitter to be involved in the project discussion from the beginning through the Work Group meetings to answer questions, listen to other points of view, help in the preparation of documents – to see the project through to successful completion.

Submitting A Project

Obtaining A Project Development Form

Project Development Forms are available on the website (www.ncpdp.org). The form can be downloaded. The Project Development Form should be filled out as completely as possible. Be sure to include the submitter contact information.

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Where To Submit The Project Development Form

The Project Development Form should then be emailed (ncpdp@ncpdp.org) or mailed to the NCPDP Council office in care of the Director of Standards Development.

Timeline For Submitting A Project

In order for a project to be reviewed at the next quarterly Joint Technical Work Group meeting, it must be submitted to the NCPDP Council office 30 days prior to the meeting date. Please check the website www.ncpdp.org for the Joint Technical Work Group meeting schedule.

High Level Project Development Steps

The following are the high level steps for the Project Development process. These steps assume the project is approved at the various review points. Please refer to “Appendix A. Project Development Steps – A Pictorial Representation”.

1. Retrieve a Project Development Form from the website.
2. Complete the Project Development Form.
3. Submit the Project Development Form to the NCPDP Council office.
4. Project Development Form is approved by Standardization Liaison as a properly completed form.
5. Project Development Form is accepted by Maintenance and Control (MC) Co-Chairs and the Standardization Co-Chairs.
6. Project Development Form is accepted by the Maintenance and Control (MC) attendees at the scheduled Joint Technical Work Group (JWTG) meeting.
7. Project Development Form is approved by the Standardization Co-Chairs.
8. Project Development Form is approved by the Board of Trustees during the next session or in monthly review packet. Standardization Co-Chairs recommend to the Board of Trustees which Work Group the project should be assigned. The Board of Trustees approve or disapprove.
9. During the next Joint Technical Work Group (JWTG) meeting, the Work Group discusses the project and votes to approve/disapprove the Project.
10. If the Work Group approves, the Work Group determines requirements to meet the project need.
11. Action is taken by the Work Group and meets approval by the membership via various means (depending on the action taken).
12. The project development steps are completed.

Initial Project Development Process

1. The project form is received by the Standardization Liaison at the Council office. The Standardization Liaison verifies the project form is complete. If the form is not complete, the Standardization Liaison will contact the submitter for more information.
2. If complete, the project is then date stamped and assigned the next available sequential number. The date and sequential number are placed in the upper right-hand corner of the document.

Preliminary Project Development Process (Pre-Acceptance)

1. Copies of the project are sent to the Standardization Co-Chairs and the MC Co-Chairs.
2. The project is discussed at the Standardization and MC Co-Chair conference call (DERF and Project discussion).
3. If the Standardization and MC Co-Chairs feel the project form is incomplete, they will indicate the area(s) that need to be completed. The Standardization Liaison will then return the project to the person that submitted it, along with appropriate information indicating the area(s) that require completion.
4. If the Standardization and MC Co-Chairs approve the acceptance of the project form, the Standardization Liaison will notify the submitter of the project number and that it will be discussed during Maintenance and Control meetings at the next JTWG.
5. The project will be available for review by the membership on the MC website page for review prior to the Joint Technical Work Group meetings.
6. The project will be discussed at the next Joint Technical Work Group meetings, during Maintenance and Control.

At The Joint Technical Work Group Meeting

1. During the next scheduled JTWG meeting, the project will be introduced and discussed during the Maintenance and Control meetings.
2. The members attending the MC meetings will vote upon the project's appropriateness.

Note: It is very important for the submitter (or a designee) to be present at the Maintenance and Control meetings, as a project will not be discussed if the submitter or designee is not present.

3. The outcome of the Maintenance and Control discussion of a project will be one of three following actions:
 - 1) Approved - The project is approved by MC and consideration given to the Work Group assignment. The project form will then go to the Standardization Co-Chairs for approval and recommendation for Work Group assignment. The Board of Trustees will then review the Standardization Co-Chairs recommendations and approve or disapprove.
 - 2) Disapproved - If the project is not approved during the MC meeting, the deliberations of the Maintenance and Control Work Group will be documented and communicated to the submitter.
 - 3) Pended - During the discussion in MC, the attendees may request more follow up information, or run out of discussion time. The project will be discussed during subsequent sessions.

Project Disapproval

The submitter of the project or designee is strongly encouraged to attend the Maintenance and Control meetings during the JTWG meetings. If the project is deferred (pended) during three (3) JTWG meetings, the project will be disapproved.

Standardization Co-Chair Process

1. After Maintenance and Control attendees have approved the project, the Standardization Co-Chairs will meet to discuss the project and the recommendations made by Maintenance and Control.
2. If the project is approved, the Standardization Co-Chairs will make a recommendation to the Board of Trustees for approval as well as the Work Group (existing or new) to be assigned to the project.
3. If the project is disapproved, the Standardization Co-Chairs will document their deliberations and communicate these to the submitter and Maintenance and Control Work Group.

Board of Trustee Process

1. Upon approval from the Standardization Co-Chairs, the project will be included in the next Board of Trustees packet.
2. The Board of Trustees will either meet as a body or review the packet via the Executive Summary. If meeting, the Board will include the project on the agenda and discuss the project. If reviewing packets, the Board members will signify their approval/disapproval on the project via email.
3. The Board may choose to request more information of the submitter. A notification is sent to the submitter by the Lead Standardization Co-Chair requesting the additional information.
4. If the Board approves the project, the Standardization Liaison will send a letter to the submitter noting the outcome of the Board and invite the submitter to participate in the named Work Group discussions at the next Joint Technical Work Group meetings.
5. If the Board does not approve the project, the project is considered disapproved at this point. The Lead Standardization Co-Chair will send a notification to the submitter noting the outcome of the Board and the reasons why the project was not approved.

Public Notification

1. The status of the project will be noted in the meeting minutes for the Maintenance and Control meetings which are available on the website.
2. If the project is approved by the Board of Trustees, members of the recommended Work Group will receive the project in the packet of information sent out by the Council prior to the next Joint Technical Work Group meetings.

What Happens To A Project In The Recommended Work Group

Once the project is approved by Maintenance and Control, the Standardization Co-Chairs, and the Board of Trustees, the Co-Chairs of the Work Group will place the project on the agenda for one of the upcoming meetings.

During the Work Group session, the project will be discussed by the attendees. The submitter will be requested to speak for a few minutes on the project. This is usually done informally, but if the submitter requests a formal presentation, the submitter should contact the Work Group Co-Chairs to discuss specifics.

During the discussion, questions and clarification can be expected at this point of the submitter.

The Work Group will determine the next course of action. The Work Group may vote to

1. approve the project
2. disapprove the project

If the Work Group approves the project, the execution of the project may be via the formation of a Task Group of the Work Group to explore the work. A white paper may be created.

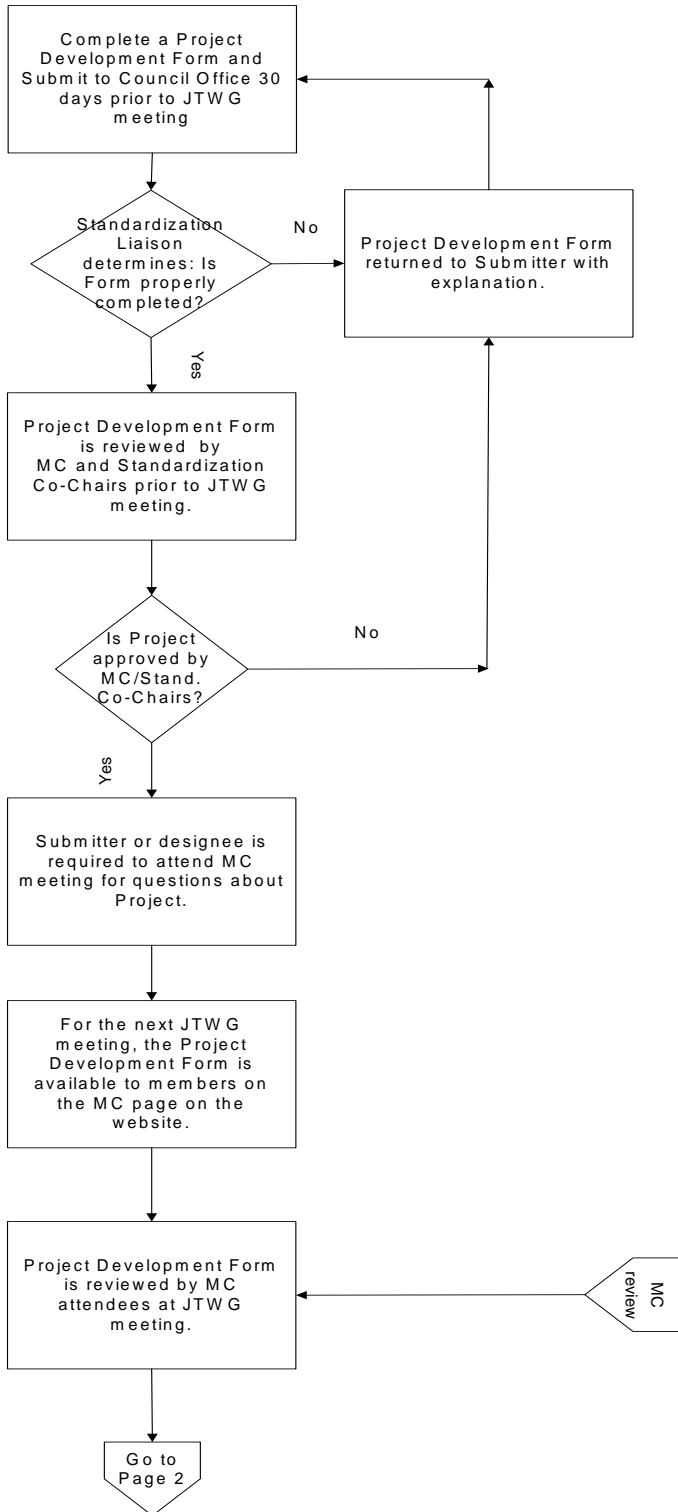
The Work Group may disapprove or not proceed with a project only if there are no volunteers to work on the project. If the Work Group disapproves the project, the submitter will be notified of the deliberations of the Work Group.

Discussion of the project will be recorded in the Work Group meeting minutes available on the website after the meetings.

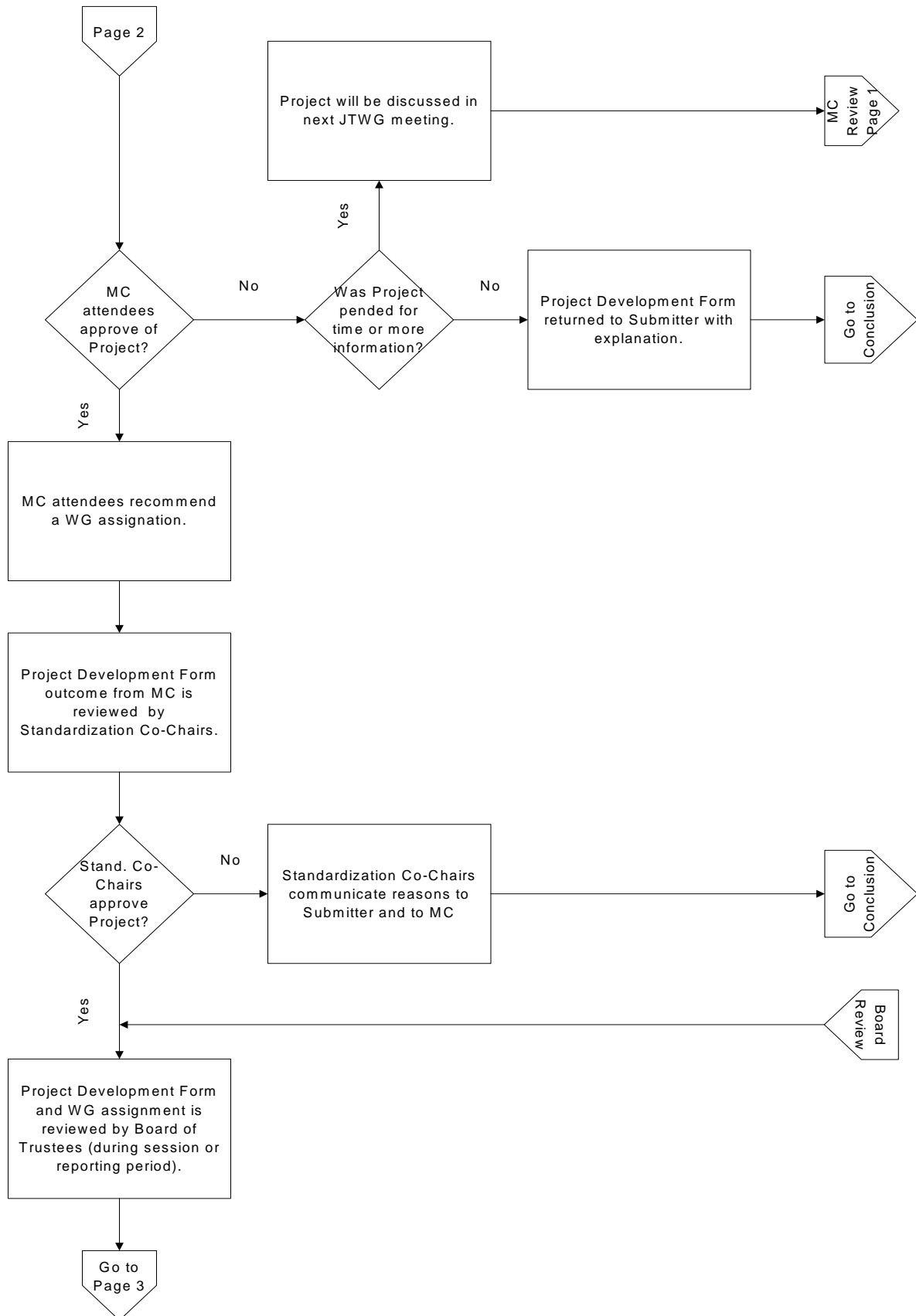
Resubmitting A Project

If a project is not approved by the Maintenance and Control Work Group, Standardization Co-Chairs, the Board of Trustees, or the Work Group, the submitter may resubmit the project addressing the reasons for disapproval. The resubmission is considered a new project and must reflect changes to the document. The project will then follow the same steps as a new project.

Appendix A. Project Development Steps – Pictorial Representation



Project Development Steps



Project Development Steps

