

# **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 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 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 worked on by the NCPDP members once the Standardization Co-Chairs, the Maintenance and Control (MC) Work Group 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 discusses the project and determines a course of action. Actions by the Work Group could be:

- The development of white papers.
- Submission of Data Element Request Form 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, and assist in the preparation of documents – to see the project through to successful completion.

## **Submitting a Project**

### ***Obtaining a Project Development Form***

The [Project Development Form](#) is available on the NCPDP website for download. The Project Development Form should be filled out as completely as possible. The submitter contact information must be included, as well as any other representative who can address the scope or questions on the project.

### ***Where to Submit the Project Development Form***

The Project Development Form should be emailed ([ncpdp@ncpdp.org](mailto:ncpdp@ncpdp.org)) to the attention of the Senior Manager of Standards Development.

## **Timeline for Submitting a Project**

In order for a project to be reviewed at the next quarterly JTWG meeting, it must be received by the Council office prior to the meeting date. Please check the NCPDP website for the [Joint](#)

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[Technical Work Group meeting schedule](http://www.ncpdp.org/Standards/Standards-Development-Process). The calendar for Project submission is located at <http://www.ncpdp.org/Standards/Standards-Development-Process> - right side *DERF/New Project Form Calendar*.

## **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. Download a Project Development Form from the website.
2. Complete the Project Development Form.
3. Submit the Project Development Form to the Council via email.
4. Project Development Form is reviewed by Standards Development Staff for proper completion.
5. Project Development Form is accepted by MC Co-Chairs and the Standardization Co-Chairs and assigned for review at the appropriate scheduled JTWG meeting. The assignment to the appropriate scheduled Work Group meeting is based on the date received by the Council.
6. Project Development Form is recommended for acceptance by the MC members at the scheduled JTWG meeting.
7. Project Development Form with MC's recommendation is reviewed and approved by the Standardization Co-Chairs.
8. Project Development Form is approved by the Board of Trustees during their next monthly review cycle. Standardization Co-Chairs recommend to the Board of Trustees which Work Group the project should be assigned. The Board of Trustees approves or disapproves.
9. During the next JTWG meeting, the assigned Work Group discusses the project and determines requirements to meet the project need.
10. Action is taken by the Work Group and meets approval by the membership via various means (depending on the action taken).
11. The project development steps are completed.

## **Initial Project Development Process**

1. The project form is received by NCPDP Standards Development Staff to verify the project form is complete. If the form is not complete, the Standards Development Staff will contact the submitter for more information.
2. If complete, the project form is then dated and assigned the next available sequential number. The date and sequential number are entered on the document.

## **Preliminary Project Development Process (Pre-Acceptance)**

1. The project form is sent to the Standardization Co-Chairs and the MC Co-Chairs prior to the next quarterly work group meeting per a calendar schedule.
2. The project form is reviewed by the Standardization and MC Co-Chairs via email.
3. If the Standardization and MC Co-Chairs determine the project form is incomplete, the Standards Development staff liaison will return the project form to the submitter, along with appropriate information indicating the area(s) requiring completion.
4. If the Standardization and MC Co-Chairs approve the acceptance of the project form, the Standards Development Staff will notify the submitter of the project number and scheduled review during MC meetings at the next JTWG meetings.
5. The project form will be available for review by the membership on the MC website page prior to the JTWG meetings.
6. The project will be discussed at the next JTWG meetings during MC.

## **At the Joint Technical Work Group Meeting**

1. During the next scheduled JTWG meeting, the project will be introduced and discussed during the MC meetings.

**Note:** It is strongly recommended for the submitter (or a designee) to be present at the MC meetings. The submitter (or a designee) will be given the opportunity to introduce the project and to answer questions about the project

2. The NCPDP members attending the MC meetings will vote on the project's appropriateness.
3. The MC discussion of the project will result in one of the following actions:
  - 1) Approved - The project is recommended for approval by MC and consideration given to the Work Group assignment. The project 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 MC Work Group will be documented and communicated to the submitter.
  - 3) Pended - During the discussion in MC, the attendees may request more information, or run out of discussion time. The project will be discussed during subsequent sessions. If the project is deferred (pended) during three (3) JTWG meetings, the project will be disapproved.



## **Standardization Co-Chair Process**

1. After MC member attendees have approved the project, the Standardization Co-Chairs will discuss the project and the recommendations made by MC. The Standardization Co-Chairs may concur with MC's recommendation and Work Group assignment or consider a different recommendation.
2. If the project is approved, the Standardization Co-Chairs will submit their recommendation to the Board of Trustees for approval including the Work Group (existing or new) assignment project.
3. If the project is disapproved, the Standardization Co-Chairs will document their deliberations and communicate these to the submitter and MC Work Group.

## **Board of Trustee Process**

1. Upon approval from the Standardization Co-Chairs, the project and recommendation will be included for review in the next Board of Trustees monthly review.
2. The Board may choose to request more information of the submitter. A notification is sent to the submitter by the Standards Development Staff requesting the additional information.
3. The Board of Trustees may accept the recommendation of the Standardization Co-Chairs or consider a different recommendation.
4. If the Board approves the project, the Standards Development Staff will send a notice to the submitter noting the decision of the Board and invite the submitter to participate in the named Work Group discussions at the next JTWG meetings.
5. If the Board does not approve the project, the project is considered disapproved at this point. The Standards Development Staff will send a notification to the submitter noting the decision of the Board and the reasons why the project was not approved.

## **Membership Notification**

1. The status of the project will be noted in the meeting minutes for the MC 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 information sent out by the Council prior to the next JTWG meetings.

## **What Happens To a Project in the Recommended Work Group**

Once the project is approved by MC, the Standardization Co-Chairs, and the Board of Trustees, the Co-Chairs of the assigned Work Group will place the project on the agenda for the next meeting.

During the upcoming Work Group session, the project will be discussed by the attendees. The submitter (or their designee) may 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 Standards Development Staff to discuss specifics.

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

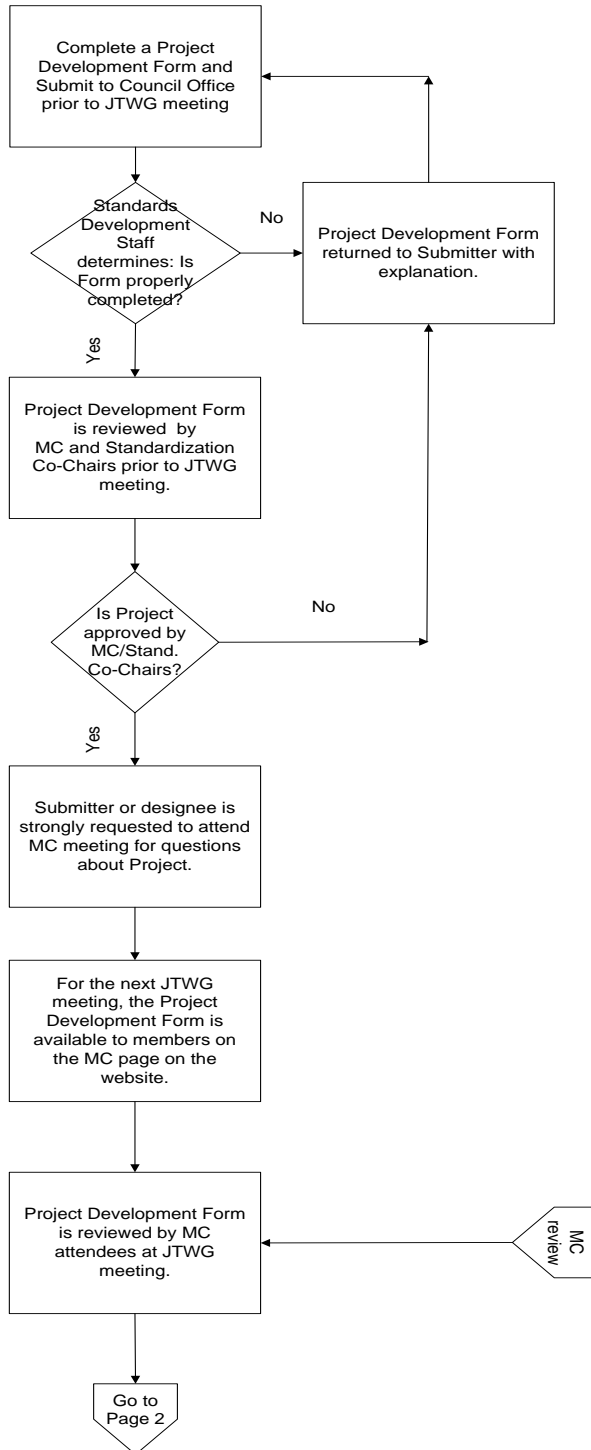
The execution of the project will be the formation of a new task group of the Work Group or assigned to an existing task group to explore the work. If there are no volunteers to lead a task group, the activity will be pended until at least one lead comes forward. If a lead is not confirmed by the next Quarterly Work Group meeting the project is disapproved and the submitter is notified.

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

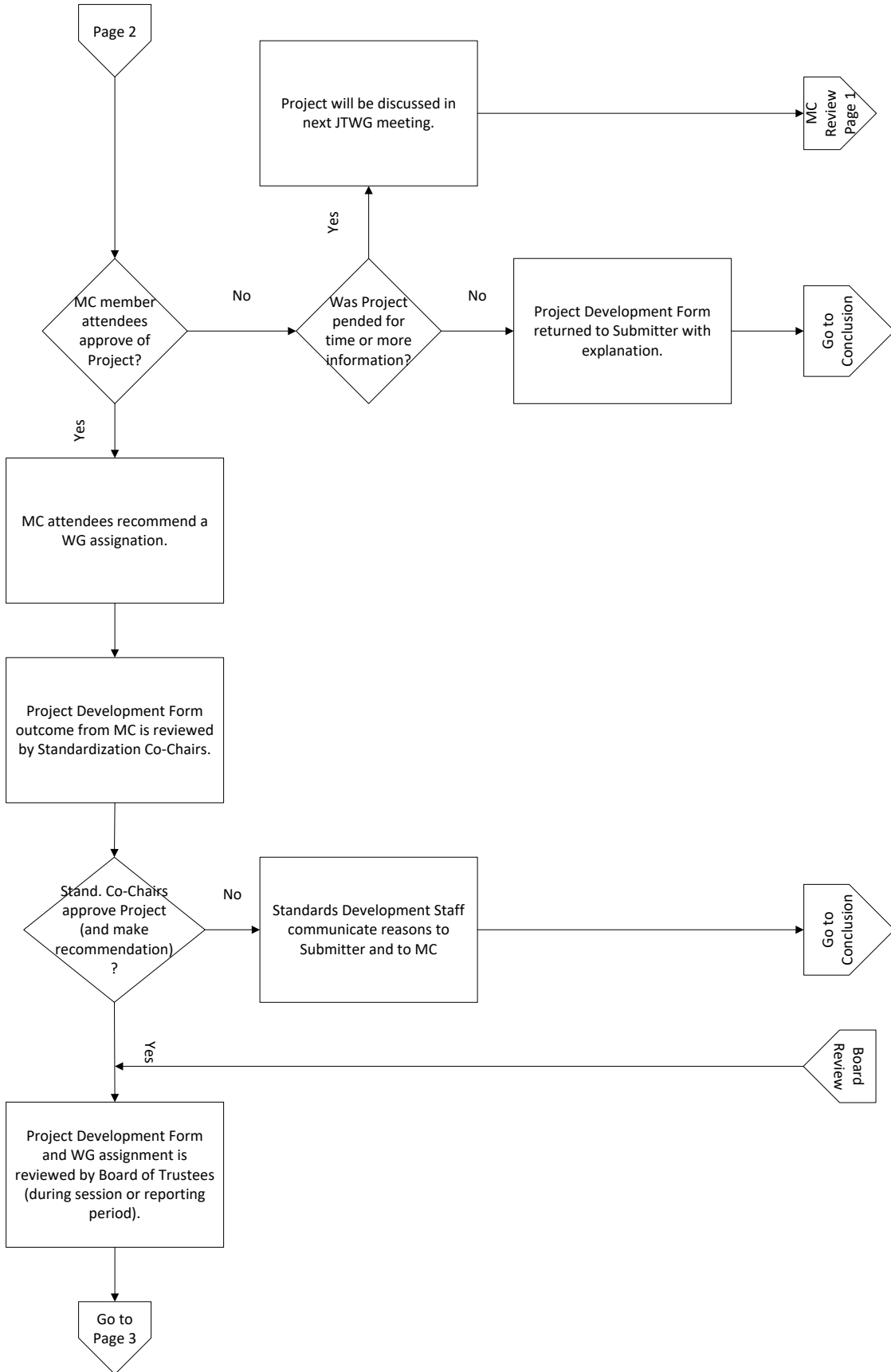
## **Resubmitting a Project**

If a project is not approved by the MC Work Group, Standardization Co-Chairs and the Board of Trustees, the submitter may resubmit the project addressing the reasons for disapproval. The resubmission is considered a new project. 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

