

# HL7 Project Tracking: Patient Matching

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## HL7 Project Information

**Targeted HL7 Ballot Cycle:** May 2022 - STU

**Sponsoring HL7 Workgroup:** [Patient Administration](#)

**HL7 Project Page:** [Interoperable Digital Identity and Patient Matching Capabilities](#)

**HL7 Project Artifacts:**

- [Project Proposal](#)
- [Project Scope Statement \(PSS\)](#)
- [FHIR IG Proposal](#)

**Related HL7 FHIR Connectathon Tracks**

- [2021-05 Cross Organization Application Access](#)
- [CMS2021-07 ONC FAST Security](#)
- [2021-09 ONC FAST Security & Identity](#)

## Project Milestones

Event	Milestones	Due Date	Lead	Status	Supporting Materials
<b>HL7 January 2022 Ballot Cycle</b>	Project Proposal Approval			<b>Complete</b>  4/14/21 - Patient Administration Workgroup agreed to sponsor this project request per meeeting minutes	Project Proposal - <a href="https://jira.hl7.org/browse/PSS-1796">https://jira.hl7.org/browse/PSS-1796</a>  <b>Accepted:</b> May 4, 2021
	PSS Workgroup Approval	June 11, 2021	Carmen, Julie	<b>Complete</b>  <b>Approved:</b> June 9, 2021  Reviewed with Payer/Provider Information Exchange on Thursday, May 27th - they decided not to be a co-sponsor at this time, but will reach out periodically to request updates  Emailed Public Health and CBCP as an FYI that PSS is available for review on 6/9/21	<a href="#">Project Scope Statement (PSS)</a>  <b>Sponsor:</b> <a href="#">Patient Administration</a>  <a href="#">PA Workgroup 6-9-21 Meeting Minutes</a>  <b>Co-Sponsors:</b> TBD  <b>Interested Parties:</b> <a href="#">Community-Based Care and Privacy (CBCP)</a> , <a href="#">Public Health</a> , <a href="#">Payer/Provider Information Exchange</a>
	PSS FMG Approval		Meena	<b>Complete</b>  <b>Approved:</b> June 16, 2021	<a href="#">FMG 6/16/21 meeting minutes</a>

PSS US Realm Steering Committee Approval		Meena	Complete  Approved: June 22, 2021	US Realm 6/22/21 meeting minutes <ul style="list-style-type: none"> <li>Added text to PSS: <i>"This FHIR implementation guide will use the US Core profiles. If this FHIR implementation guide is unable to use a US Core profile, we will follow the Cross Group Projects WG's variance request process, and provide the US Realm Steering Committee an approved rationale for deviation in the implementation guide where applicable."</i> <ul style="list-style-type: none"> <li><a href="https://confluence.hl7.org/display/USR/US+Core+Language+For+IG+PSSs">https://confluence.hl7.org/display/USR/US+Core+Language+For+IG+PSSs</a></li> <li><a href="https://confluence.hl7.org/display/CGP/US+Core+Variance+Request+Process">https://confluence.hl7.org/display/CGP/US+Core+Variance+Request+Process</a></li> </ul> </li> <li>US Realm would like us to liaise with Ron Parker at TSC (transferable standards) and to be cognizant of international applications of this IG as we proceed, since they expect it will have global utility even though we have a rationale for being US Realm only for now.</li> <li>US Realm also indicated the team should review a related IHE initiative: <a href="https://wiki.ihe.net/index.php/PDQ_Matching">https://wiki.ihe.net/index.php/PDQ_Matching</a></li> </ul>
PSS TSC Approval Deadline	Aug 22, 2021		Complete  Approved: June 28, 2021	TSC eVote: <a href="https://confluence.hl7.org/display/TSC/TSC+e-Vote+2021-06-21">https://confluence.hl7.org/display/TSC/TSC+e-Vote+2021-06-21</a>  TSC 6/28 Meeting Minutes
Develop project page(s) in Confluence		Dana	FAST Confluence page - COMPLETE  HL7 Confluence page - COMPLETE	<ul style="list-style-type: none"> <li>FAST Confluence site for private team admin, project tracking, content sharing</li> <li>HL7 Workgroup Confluence site/ project page for public project information, documentation</li> </ul>
Finalize IG development team		ONC/ FAST Leads	COMPLETE	
Decide when to take working sessions public/ add to HL7 calendar	End of August		COMPLETE	
Define IG scope /requirements	End of July? (2 working sessions?)			Starting points in cross-org matching scenario in the Identity solution document (Includes \$ match inputs, elements on an individual identifier that should be required). Continue to catalog existing efforts in the field relating to digital identity.
Draft \$ match operation	End of Aug? (2 working sessions?)			Articulate the best practice inputs and outputs, including level of verification as applicable, to help cross-org exchange participants establish confidence in use of \$match and similar matching workflows. Identify the use cases where different match requirements might be appropriate (patient access, TPO, etc.).
Define best practices, FHIR profiles, etc.	End of Sept? (2 working sessions?)			Provide guidance on best practice identity verification procedures and how this information is communicated in an interoperable way. If time: baseline requirements for individual Digital Identity and how it is represented and used in FHIR transactions.
Refine IG	End of Oct? (3 working sessions?)			Review and discuss draft document, adding points of clarification and addressing preliminary community feedback. Address global use of this IG, its crossover to IHE, ?
FHIR IG Proposal Due to FMG	Oct 31, 2021		COMPLETE  Patient Administration Workgroup approved 9/8/21 - 2021-09-08 Conference Call Agenda  FMG approved 9/8/21 - 2021-09-08 FMG Meeting Minutes	FMG IG proposal template - <a href="https://confluence.hl7.org/display/FHIR/IG+Proposals">https://confluence.hl7.org/display/FHIR/IG+Proposals</a>  Project facilitator needs to meet with FMG to get this reviewed/ approved
FHIR IG Publisher /Validation Issues Reported	Feb 20, 2022		COMPLETE	IG tooling needs to be up and running (publisher/validation issues reported)
Notice of Intent to Ballot (NIB)	Feb 20, 2022		COMPLETE	Project facilitator needs to work with HL7 workgroup to have them complete and submit the NIB prior to deadline  <a href="#">Notice of Intent to Ballot</a>
Ballot Signup Starts	March 1, 2022	N/A		
Get on Workgroup Agenda to Review IG	Week of March 7th, 2022			Co-sponsor review?
QA Period Starts	March 15, 2022			IG content needs to be 'frozen' by the time of this review by HL7 workgroup; after review, only non-substantive changes can be made (e.g., edits to address workgroup concerns, typos, formatting, etc.)

QA Period Ends	March 24, 2022			
Submit Publication Readiness Checklist	March 27, 2022			
Final IG Content	March 27, 2022			IG is complete
Ballot Readiness Signoff	March 29, 2022			
Ballot Signup Ends	March 31, 2022	N/A		
Ballot Voting Starts	April 1, 2022	N/A		
Ballot Voting Ends	May 1, 2022	N/A		

## Connectathon History

Event	Milestones	Due Date	Lead	Status	Supporting Materials
<b>May 2021 Connectathon</b>	May 2021 Connectathon Proposals Due	Mar 23, 2021		COMPLETE	Test initial \$match concepts within <a href="#">2021-05 Cross Organization Application Access</a> track
	Track orientation session	May 4-May 14, 2021			
	Participate in event	May 17-19, 2021			
<b>July 2021 CMS Connectathon</b>	Participate in event	July 21, 2021		COMPLETE	Additional discussion of \$match attributes and level of verification within <a href="#">FAST Security</a> track
<b>Sept 2021 Connectathon</b>	Sept 2021 Connectathon Proposals Due	July 21, 2021			Previously-used Cross-Org Application Access track updated for Sept Connectathon <ul style="list-style-type: none"> <li>Added preliminary business rules</li> <li>\$match that requires certain inputs and expects certain outputs, varying based on B2B or B2C use cases identified as highest priorities</li> </ul>
	Track orientation session	Late Aug/early Sept 2021			8/16, 8/30 and 9/13 track prep scheduled; recordings available
	Participate in event	Sept 13-15, 2021			