



Project Plan for Phase 1 of the eCitizen Kantara Patient ID Service Project  
Version: Draft 1.0 February 14, 2011

This document was agreed on 2/14/2011 by Joni Brennan on behalf of Kantara, by Nat Sakimura on behalf of OpenID Foundation of Japan and by Daniel “Dazza” Greenwood, on behalf of eCitizen Foundation.

## Overview

This project plan, as identified in the contracts between the eCitizen Foundation, the Kantara Initiative and the OpenID Foundation of Japan (the Parties), describes the agreed and binding expectations of the Parties regarding the conduct and results for this project, subject to the terms of the applicable contracts. Details and links to particular documents, including the final contracts among the Parties, are contained in the [Project Collaboration Document](#).

While some agile or waterfall techniques may be used to iteratively develop the design and specifications for the PIDS and Phase 2 pilot, the overall arc of this project will be “chunked” in a traditional, step-wise, manner including an initial Project Plan followed by a designated period for requirements setting, followed by design (together comprising Phase 1) followed by building and testing (Phase 2).

While all relevant technologies will be considered on their merits, in deference to the OpenID Foundation of Japan, [OpenID Artifact Binding](#) will be specifically explored and considered. In addition, the role of the Kantara IAF and Trust Frameworks, Levels of Assurance and Meaningful Use requirements will be specifically examined.

## Purpose and Goals of this Project

The aim of this project is to research, design and specify a Patient Identity Service (PIDS) enabling the Meaningful Use requirements issued by HSS ONC on November 7, 2010 for Patient Access ([Measure 5 of the “Menu Set”](#) and [Measure 12 of the “Core Measures”](#) applicable to Eligible Professionals) and to propose a pilot to test and further develop the PIDS. The goal is to design and specify a PIDS in a way that is technology neutral, vendor neutral and for which at least one compliant implementation will be created under an open source Apache 2.0 license.

## **Deliverables and Milestones**

### **Milestone 1: PIDS Project Kick-Off Session**

This Milestone session will be a presentation of the Project Overview by the eCitizen Foundation to the Kantara Health Identity Assurance Workgroup. This session will include a question and answers, and a broader call for participation in various parts of the project, including assistance with the field survey including a literature review, help identifying prospective organizations and companies for participation in Phase 2 and work on fund raising for the implementation and testing of PIDS.

**Target Date:** Thursday, February 17th, 1pm Eastern Time

### **Deliverable 1: PIDS Project Overview**

This deliverable will primarily be a slide deck with links to related project resources, including online resources such as a field survey tool, as well as highlights of the Project Plan and requirements gathering process.

**Target Date:** Friday, February 25th, 2011

### **Milestone 2: Complete Interviews and Field Survey**

The eCitizen Foundation will conduct a series of interview sessions and research relevant literature, technologies, standards, businesses and other relevant information. The interviews will target stakeholders from all perspectives, including patients, providers, insurers, vendors, technologists, privacy advocates and government.

Business, functional, legal, policy, technical and social aspects will be addressed.

**Target Date:** Friday, April 8th, 2011

## **Deliverable 2: Requirements & Constraints Document**

This document will include the results of interviews and a field survey including a literature review for the purpose of identifying and describing requirements and constraints applicable to the PIDS and a Phase 2 implementation and test pilot. Feedback will be sought on the document in advance of delivery based upon an early version presented to the Parties for review and comment.

**Target Date:** Friday, April 15th, 2011

## **Deliverable 2.1: Concept Design or Options Document**

This document (which may take the form of a slide deck, video or mixed-media) will describe a conceptual design approach or options based upon the feedback and requirements and for the purpose of achieving the goals and aims agreed in this Project Plan for a PIDS. Feedback will be sought on the document in advance of delivery based upon an early version presented to the Parties for review and comment.

**Target Date:** Friday, April 22st, 2011

## **Milestone 2: Mid-Project Review Session**

This session will be for the purpose of presenting the Requirements and Constraints and providing a walk-through of a draft Conceptual Design or options for designs of a PIDS and a Test Pilot. Feedback will be sought on the document and draft proposal, in advance of this session based upon an early version presented to the Parties prior to this session, as well as feedback at the session and for a designated period after the session.

**Target Date:** Thursday, April 28th, 2011

## **Deliverable 3: Draft PIDS Design & Phase 2 Pilot Plan**

Based upon the feedback received to date, and any additional research and design work, a PIDS Design and Test Pilot Project Plan will be created and delivered. Feedback will be sought on the document in advance of delivery based upon an early version presented to the Parties for review and comment.

**Target Date:** Friday, May 27th, 2011

## **Milestone 3: Final Presentation Session**

The Project will culminate with Final Presentation of the PIDS Design and Test Pilot Plan. In advance of this meeting the final draft document(s) will be circulated for review, feedback by the parties. Feedback will be sought on the document and draft proposal in advance of this session based upon an early version presented to the Parties prior to this session

**Target Date:** Thursday, June 9th, 2011

## **General Expectations**

### **Tools and Resources**

To facilitate collaboration between the Parties, a [Project Collaboration Document](#) (currently a Google Doc) shall serve as the central spot to reflect current information including meeting schedules and agendas, links to final documents, agreed public statements about the project and other information or materials needed for this project.

### **External Communications and Attributions**

The OpenID Foundation of Japan and Kantara have the obligation to review and provide feedback on eCitizen deliverables and the OpenID Foundation of Japan has the right to withhold their name from final deliverable at their discretion. Agreed public statements, including slides to be included in public presentations describing this project, the text of press releases or other external communications about any other Party regarding this

Project shall be agreed by the respective Parties and included for use in the [Project Collaboration Document](#).

## **No Confidential Information**

It is understood and agreed that no party wishes to receive from any other party any confidential information from that party or of any third party. Each party agrees that any information provided to any other party in the course of this project shall not be confidential or proprietary, unless otherwise explicitly agreed and in writing on the [Project Collaboration Document](#).