

Waverly Family Health Services Project Plan

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Project Sponsor	Professor Gifford	X _____ Professor Gifford Project Sponsor	
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Template Guide

What is a Project Plan?

The [Project Plan](#) is the central document by which the project is formally managed. A Project Plan is a document which lists the activities, tasks and resources required to complete the project and realise the business benefits outlined in the Project Business Case. Each module you will have an assignment that will have you populate various sections of the PMP. We are using an Electronic Health Record implementation as a project plan case. We won't do high level detail in the EHR implementation but focus on major implementation areas. While creating your PMP keep in mind this is a high level document and contains the following areas:

- A description of the major phases undertaken to complete the project
- A schedule of the activities, tasks, durations, dependencies, resources and timeframes
- A listing of the assumptions and constraints identified during the planning process.

To create a Project Plan, the following steps are undertaken:

- Reiterate the project scope
- Identify the project milestones, phases, activities and tasks
- Quantify the effort required for each task
- Allocate project resource
- Construct a project schedule
- List any planning dependencies, assumptions, constraints
- Document the formal Project Plan for approval.

When to use a Project Plan

A project plan document is recommended in any project in order to define deliverables, manage resources, people and risk. We will be adding to the project plan through-out the course as part of your module assignments. In Module 7 you will complete the project plan and hand in your completed plan. In normal projects the Project Plan is referenced constantly throughout the project. As the project is undertaken, the Project Manager tracks the percentage of task completion and the task completion date (actual vs planned) to assess overall project performance. These statistics are communicated to the Project Sponsor/Board within a regular Project Status Report.

How to use this template

This document provides a guide on the topics usually included in a Project Plan. Example tables, diagrams and charts have been added (where suitable) to provide further guidance on how to complete each relevant section.

1 Planning Basis

[Project Charter](#)/ Refer to Appendix

The purpose of the project is to convert all paper and stored medical records for Waverly Family Health Services to practice fusion's electronic health record. Refer to Appendix A to the [Project Charter](#) for the complete outline.

Work Break Down Structure

1.1 Milestones

List and describe the key project milestones within the following table. Examples are provided that you may utilize:

Milestone	Description	Delivery Date
Project Charter approval	The Business Case has been documented and was approved by the Project Sponsor.	02/03/21
Project Team Appointed	Team member selected to use on EHR conversion and scheduled accordingly.	02/09/2021
Work Break Down Structure(WBS)	WBS approved	02/28/2021
Quality and Testing plan approval	QT approved	03/3/2021
Data Transfer finalization	Data transfer complete from both archived and active patient charts.	05/26/2021
Evaluation plan approval	Evaluation plan approved.	05/31/2021
Training	Staff training complete and updated prior to "Go Live" including downtime training complete	06/05/2021
Launch	Go live for staff in a big bang with additional 2-week handicap for extra training	06/7/2021
Evaluation	Finalization and assessment of performance	
Completion	Project closure	06/8/2021

1.2 Phases

- Project Initiation
- Project Planning
- Project Execution
- Project Closure.

List and describe the major project phases within the following table.

Phase	Description	Sequence
Project Initiation	Defining the project by developing a Project Charter as well as recruiting the project team.	Phase # 1
Project Planning	During planning the project, a wbs is drawn and so is a quality and testing plan.	Phase #2

Project Execution	The plan is taken into effect, workflows are improved, and the project is executed until completion.	Phase #3
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1.3 Activities

List and describe the major project activities within the following table.

Phase	Activity	Description	Sequence
Project Planning	Develop Quality Plan	Produce a document describing Quality Assurance and Quality Control and process review activities to be undertaken.	After the Project Plan but before the formulation of supplier contracts
Project Initiation	Develop Project Charter	Map out the project with key stakeholders, description of project, risks, assumptions, and constraints	At the start of the project.
Project Execution	Data Transfer	Transfer all medical records from charts and archived to the new system utilized.	After workflow improvement and before training.

1.4 Tasks.

A 'task' is simply an item of work to be completed within the project. List all tasks required to undertake each activity, within the following table:

Phase	Activity	Task	Sequence
Project Planning	Develop Quality Plan	Identify Quality Targets Identify Quality Assurance Techniques Identify Quality Control Techniques Document Quality Plan	1 st 2 nd 3 rd 4 th
Implementation	Staff training	Decide of Big bang approach or incremental Develop system down procedures Initiate training Identify adaptive stakeholders to encourage cross-training	1 st 2 nd 3 rd 4 th
Implementation	EHR Testing	Completed after data entry. Use a checklist to ensure accuracy such as this template . Fix errors Document and sign off	1 st 2 nd 3 rd 4 th

1.5 Effort

For each task listed above, quantify the likely 'effort' required to complete the task.

Task	Effort
Identify Quality Targets	<i>Low level</i>
Identify Quality Assurance Techniques	<i>Medium level</i>
Identify Quality Control Techniques	<i>High level</i>
Document Quality Plan	<i>High level</i>
Establish workflow improvement	High Level
Retrieve archived records to transfer to EHR	Medium Level

1.6 Resources

For each task identified, list the resources allocated to complete the task.

Task	Resource
Identify Quality Targets	<i>PM</i>
Staff Training	<i>Trainer</i>
EHR testing	<i>Lead</i>
Assign team	PM
Upload EHR	Lead

2 Project Plan

2.1 Schedule(Gantt chart)

Provide a summarized schedule for each of the phases and activities within the project you have identify using the supplied Gantt chart template. The Gantt chart will provide a time sequence for all your phases and important activities.

Note: Refer to the Appendix for a detailed project schedule.

2.2 Dependencies

'Dependencies' are logical relationships between phases, activities or tasks which influence the way that the project must be undertaken. Dependencies may be either internal to the project (e.g. between project activities) or external to the project (e.g. a dependency between a project activity and a business activity). An example of a dependency for this project is: Staff training on the new EHR can't occur until the responsible person for carrying out the training(project trainer) has been trained on the new EHR.

There are four types of dependencies:

1. Finish-to-start (*the item this activity depends on must finish before this activity can start*)
2. Finish-to-finish (*the item this activity depends on must finish before this activity can finish*)
3. Start-to-start (*the item this activity depends on must start before this activity can start*)
4. Start-to-finish (*the item this activity depends on must start before this activity can finish*).

List any key project dependencies identified by completing the following table:

Activity	Depends on	Dependency Type
Set-up Project Office	Appoint Project Team	Finish-to-start
Data entry	Project plan with resource, quality, and risk plan approved	Finish-to-finish
Develop workflow improvement plan	Methods to improve the workflow need to begin before the start to maximize efficiency.	Start-to-Start

In the example given above, the activity "Appoint Project Team" must finish before Stactivity "Set-up Project Office" can start.

2.3 Assumptions

List any planning assumptions made. For example:

It is assumed that:

- The project will not change in scope
- The resources identified will be available upon request
- Approved funding will be available upon request.
- The key stakeholder will not withdraw services.
- Equipment needed will be set-up upon arrival.
- COVID protocols will be followed.

2.4 Constraints

List any planning constraints identified. For example:

- The project must operate within the funding and resource allocations approved
- The project team must deliver the EHR implementation and "Go Live" on the agreed upon date with no requirement for additional hardware
- Staff must complete the project within normal working hours to avoid unbudgeted overtime expenses.

3 Quality and Test Plan

Quality Plan

A failure mode effects and analysis was performed located in [Appendix B](#) assessing potential risks that could occur during the project and determined course of action in the case of moderate to catastrophic events. A testing plan is in place to test EHR quality before the “go live” phase of project to ensure EHR patient demographic accuracy, e-prescribing and record reconciliation accuracy, correct display of labs and imaging reports, and proper retrieval of clinical records.

Quality Test Plan

The electronic health record system testing plan developed by the Health Information Technology Research Center from the Iowa Foundation for Medical Care was utilized for this project. A total system review and analysis was performed to check the accuracy of the new EHR before “go live” and can be accessed in [Appendix C](#).

4 Project Closure Report

Module #7

A project closure report is a document which formalizes the closure of the project. It provides confirmation that the criteria for the end user or customer has been met. This also provides “What’s next” for handing of the project. Utilizing the supplied project closure report template, provide a summary of the project closure report and place under this heading. Please the complete document under the appendix section

Appendix

Appendix A

A. General Information

Project Sponsor:	Professor Tennille Gifford
Project Manager:	Rachel Dixon
Prepared by:	Rachel Dixon
Date:	2/3/2021

B. Purpose

The primary purpose for implementation of the EHR conversion project is to convert all current and archived medical records to Practice Fusion cloud-based EHR. This in an initial EHR conversion for Waverly Family Health

Services and the key stakeholders and all other stakeholders have no prior experience in utilization of an electronic health record platform and will require extensive training to mediate the transition.

C. Constraints and Assumptions

The assumptions and constraints involved are stakeholder learning deficiencies, service connectivity issues, budgeting conflict, equipment compliance issues, poor staff attendance and involvement, and any other possible stakeholder conflict or issue that may arise.

D. Project Scope Statement

The project scope for Waverly Family Health Services is to implement an initial EHR conversion. The goal is to have the project completed in 6 months with an additional 1 month of support services included post project completion. The budget allocated for this conversion and training is \$80,000, with \$40,000 in reserve for any unforeseen events. Equipment and hardware are in place as stated from the key stakeholder with computers and full workstations set-up to compliance standards to begin the project.

E. Resource Requirements

Resources required to complete project are the practice fusion platform, computers, hardware, workstations, EHR project manager, project team, and financial loan with American Express.

F. Risks

Events or conditions that could impact or impede the success of this project are equipment failure, poor internet connectivity, electrical power outage, sudden budget restrictions from American Express, and all other unforeseen risks that may occur during the 6 months.

G. Success Metrics: Criteria for Evaluating Project Success and Milestones

The metric to measure success is to complete project in the allotted timeframe of 6 months with no need to source reserved finances. The milestones to measure will be determined upon arrival to determine project breakdown to maximize total project workflow. The key stakeholder's involved are Dr. Waverly, owner, and medical director. Dr. Jones, physician and clinic partner, and Mrs. Jones, clinical director.

F. Executive Summary

The project conducted for the Waverly Family Health Services has been sponsored by Professor Gifford and will be managed by Rachel Dixon, to convert the paper medical records currently stored and filed by the Waverly Family Health Services for all archived and current patients records to Practice Fusion's web-based Electronic Health Record. The budget for the project is 80,000 and is anticipated to be completed within a 6-month time frame. Additionally, 40,000 is on reserve for any unanticipated and unforeseen circumstances and events that may arise during the project timeline.

- Project Work Break Down structure created from your template
- Project Test plan created for your template
- Project Quality plan created from your template
- Project closure document
- Any additional information you will need to reference during your project implementation

Appendix B

FMEA Template

Process analyzed: Rachel _____

Team leader: David _____

Team members:

Name	Position
Rachel	Project Manager
David	Team Lead
Bryant	IT Specialist
Kelly	EHR Specialist
Lynn	EHR Trainer
Gavin	EHR Analyst

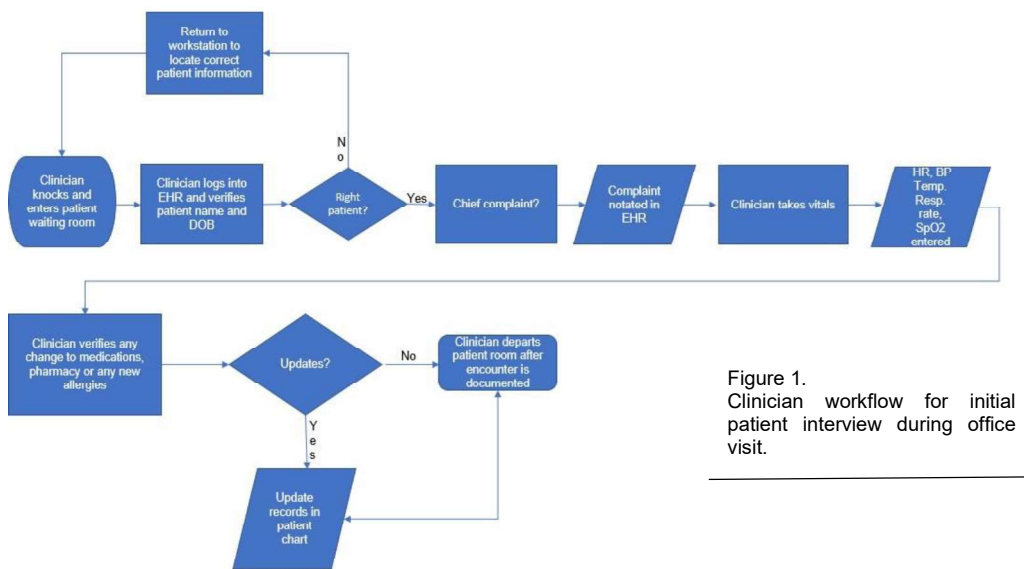


Figure 1. Clinician workflow for initial patient interview during office visit.

During the process of hardware set-up at a single workstation, possible hardware related failures that could go wrong during the clinician/patient interview would be: Hardware breakdown, Power outage, Wi-Fi down, End-user failure, System hack, Water damage,

Chewed wires, and all other unanticipated and unforeseen events. In the event of a power outage the following workflow is the procedures to follow in said event.



For each item identified that could go wrong, rate each for the seriousness of this outcome (severity) and how often the mistake is likely to occur (probability) (per the suggested guidance and your rating scale preferences). Indicate these ratings on the sticky notes that identify what could go wrong.

Rating	Outcome Category	Definition (the following are examples you need to define your own)
5	Very High probability: failure is most inevitable	1 failure in 100 attempts
4	High: repeated failures	1 failure in 500 attempts
3	Moderate: occasional failures	1 failure in 1,000 attempts
2	Low: relatively few failures	1 failure in 10,000 attempts
1	Remote: failure is unlikely	< 1 failure in 500,000 attempts

Based on the above rating scale, in the event of a power outage, this is a minor event and would be placed as a '2' for relatively few failures. This can be mediated with proper systems down procedures.

Review your ratings and decide on your process failures identified as high priority for corrective actions. List the process failures you will focus on in the table below.

Rating	Outcome Category	Description
5	Catastrophic	A systems hack would violate HIPAA and an immediate warning would need to be blasted to all affected parties.
4	Major	A systems hardware breakdown would cause a delay and would cause unneeded backlogs of data to be entered.
3	Moderate	An end used failure would require customer to call the provider of the EHR to perform a diagnostic to fix issue.

2	Minor	A wi-fi down or power outage can be managed by notifying service provider for maintenance and proceed with systems down paper charting procedure.
1	Near Miss	No login credentials would require a system update to add users.

Describe your corrective actions for process failures identified as high priority:

Process Failure	Root Cause of Process Failure	Specific Actions to Reduce or Eliminate the Failure	Completion Time Frame	Responsible Individual/Group
System Hack	Staff does not log out	30 sec. screen timer placed to logout	30 days	IT Specialist
Hardware breakdown	Old equipment	Back-up hardware with installed applications	60 days	IT Specialist
End user failure	New hire training insufficient	EHR trainer refresher	30 days	EHR Trainer
Unable to login	Update not made for new users	Office manager to add user to EHR platform	5 days	Office Manager

Measures of Success

<p>Corrective Action</p>	<p>Measure(s) of Success (How we will know if this action is successful) (Consider measures of how often the failure is still occurring after process changes and the incidence of adverse events related to the failure)</p>	<p>Reporting Schedule and Individual or Group Responsible for Reviewing Results</p>
<p>System Update for a screen time-out action</p>	<p>By applying a time out with non-use, the instance of a hack will be reduced drastically and hopefully eliminated and will help prevent from HIPAA violations.</p>	<p>Results will be reviewed by Office manager And key stakeholder and should take 30 days to Complete.</p>
<p>Hardware Breakdown</p>	<p>A full set-up will be ready in storage and a repair specialist will maintenance equipment.</p>	<p>Results/diagnostics will be reported to office manager within 60 days and new system will be installed within 1-3 working days.</p>

Signature of FMEA leader/facilitator__Rachel Dixon_____ Date _2/14/2021_____

Appendix C

Test	Components	Date	Responsibility	Accepted
Unit & Functional Testing	Each major function performs as specified in user manual.	5/31/2021	Gavin	YES
	Design changes/customizations are present & work as requested. Document all changes for reference.	5/31/2021	Gavin	YES
	Screens appear as expected (content and placement of fields, codes, drop down menus, and messages).	5/31/2021	Gavin	YES
	No spelling errors or color changes. Readable icons.	5/31/2021	Gavin	YES
	Appropriate representation of content can be printed if necessary for legal purposes.	5/31/2021	Gavin	YES
	Entries that have been corrected and their corrections are both displayed accurately.	5/31/2021	Gavin	YES
	Fields edits (e.g., valid values, options, defaults) function as expected.	5/31/2021	Gavin	YES
	Alerts and clinical decision support provides appropriate reminders and prompts. Use scripts to test various scenarios.	5/31/2021	Gavin	YES
	System Testing	Workflows send and/or receive data properly between systems (e.g., between EHR and pharmacy or billing, PMS messages and EHR). Use scripts to test various scenarios.	5/31/2021	Gavin
Interfaces between applications move data correctly and completely. Test both sending and receiving when interfaces are bi-directional.		5/31/2021	Gavin	YES
Connectivity with external organizations is accurate and complete as authorized (e.g., portal access to/from hospital/clinic, continuity of care record to referrals, personal health records for patients, disease management to/from health plan).		5/31/2021	Gavin	YES
System access is appropriate per assigned privileges. Test attempts to gain access when not authorized.		5/31/2021	Gavin	YES
Data are processed accurately, in graphs, tables, claims, client summaries, reports, etc.		5/31/2021	Gavin	YES
Data correctly populate registries, reporting warehouses, etc.		5/31/2021	Gavin	YES
Integrated Testing (simulates live environment)		Ensure all system components that share data or depend on other components work together properly.	5/31/2021	Gavin
	Ensure that workflows reflect actual new processes and workflows.	5/31/2021	Gavin	YES
	Ensure that usage is defined in and follows policies and procedures. Reinforce training as applicable.	5/31/2021	Gavin	YES

Test	Components	Date	Responsibility	Accepted
	Ensure that help desk, support personnel, and other aids function properly.	5/31/2021	Gavin	YES
	Ensure that EHR works with all forms of human-computer interface devices and modalities being used (e.g., tablets, PDAs, voice recognition, and speech commands as applicable).	5/31/2021	Gavin	YES
	Attempt to break the system by testing mission critical and high risk functions, such as situations requiring exception logic (e.g., overrides to clinical decision support), handoffs from one process to another, and when you may have a series of events over a period of time (e.g., assessments performed at designated intervals).	5/31/2021	Gavin	YES
Performance & Stress Testing	Measure response times for key transactions or interactions with the system, and assure they are within acceptable limits, which may be defined in the contract.	5/31/2021	Gavin	YES
	Simulate an extremely high volume of activity on the system such as would exceed anticipated peak loads of system usage.	5/31/2021	Gavin	YES
	Measure the time it takes to generate reports and data dumps, and the impact on system performance.	5/31/2021	Gavin	YES