<PROJECT NAME>

PROJECT PLAN

Version <1.0>

<dd-mmm-yyyy>

This template helps project managers draw up a more detailed project plan (a charter) with sections on the requirements gathering process, project organization, implementation planning, policy compliance, risk mitigation, and evaluation strategy.

Version History

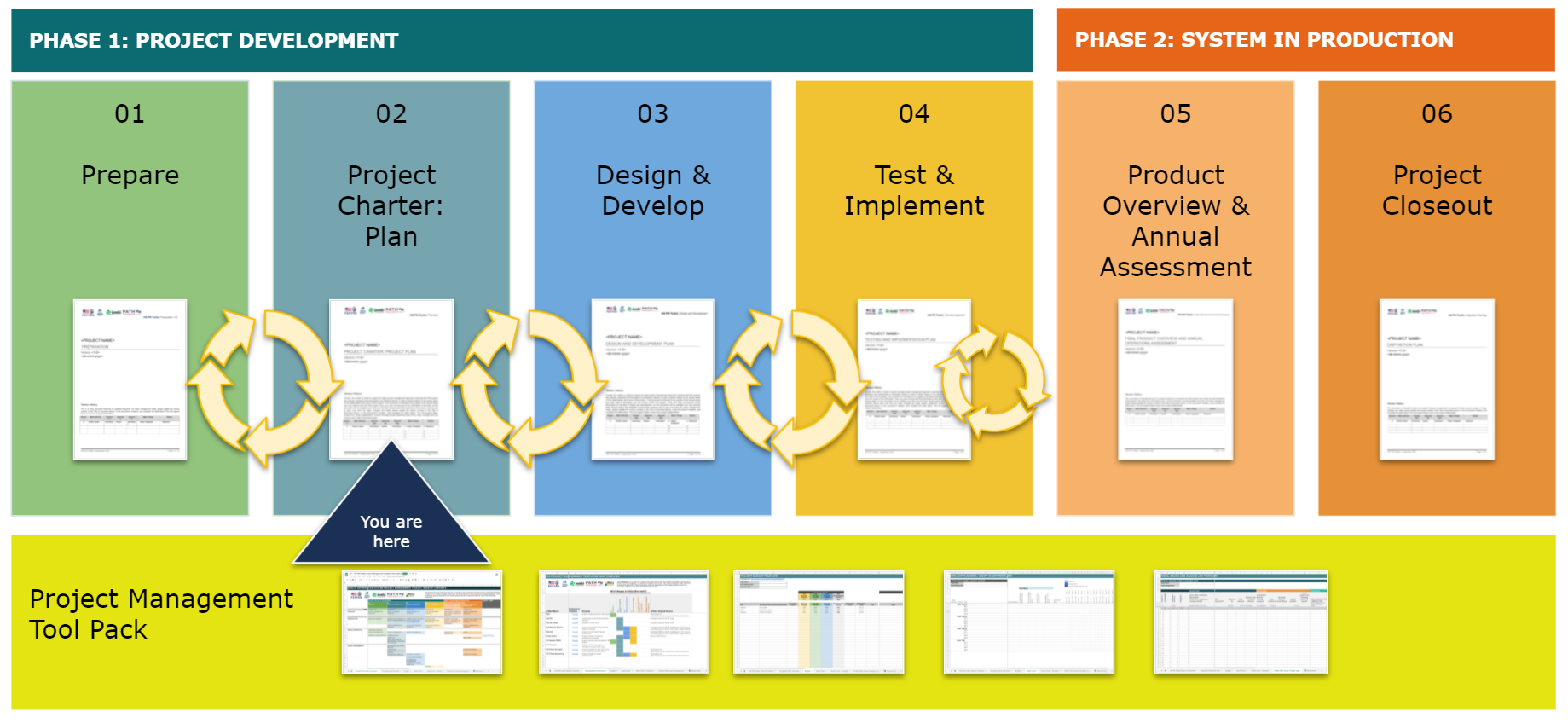
Overall, this toolkit is meant to support an Agile project management approach meaning that HIS projects are planned, designed and developed in an iterative manner in order to deliver based on the actual needs of the stakeholders and users of the product. This document is intended to be a guide of the topical areas you may need to plan the HIS project. Thus, you may not have all of the information at the start, so this document will be updated over time and the team should expect this template to have many versions and to grow over time. As major changes are made, please update the version number in the Title of document above, in the document’s headers, and complete the table below. This will support faster review from project stakeholders. Ensure the appropriate leadership signs off on major changes and new versions per project Governance plan.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Version #** | **Main Author(s)** | **Revision**  **Date** | **Approved**  **By** | **Approval**  **Date** | **Major Change** | **Reason** |
| 1.0 | **<Author name>** | **<mm/dd/yy>** | **<name>** | **<mm/dd/yy>** | * **<major change(s)>** | * **<Reason)>** |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |

ABOUT THIS TOOLKIT

[The Health Information Systems Project Management toolkit was created for new and mid-level project managers to support preparation, planning, design, development, implementation, and project closeout processes. Overall, this toolkit is meant to support an Agile project management approach meaning that HIS projects are planned, designed and developed in an iterative way in order to deliver a product based on the actual needs of the stakeholders and end users of the product. This template serves as a guide and should be **tailored to your project and project needs.** Throughout the toolkit you’ll find useful links for additional templates, guidance (“boilerplate”) language to help guide, along with checklists to help project managers think through critical elements of this stage.



ACKNOWLEDGEMENTS

This toolkit was adapted from CDC’s Enterprise Performance LIfe Cycle Lite templates in early 2021. Thank you to all of the individuals and organizations who have contributed. Members of the HIS PM Toolkit workgroup, who advised and shared feedback on the Toolkit include: Briana Lozano (US Centers for Disease Control and Prevention), Jan MacGregor (TEKsystems), Herman Tolentino (US Centers for Disease Control and Prevention), Linda Taylor (Jembi Health Systems), Brianna Musselman (PATH), Carli Rogosin (Digital Initiatives Group at the International Training and Education Center for Health (DIGI/I-TECH), University of Washington) and Elizabeth Dunbar (Digital Initiatives Group at the International Training and Education Center for Health (DIGI/I-TECH), University of Washington). The HIS PM Toolkit workgroup was led by the Digital Initiatives Group at the International Training and Education Center for Health (DIGI/I-TECH), University of Washington, as part of the PATH Consortium.

FUNDER ACKNOWLEDGEMENT

The development of HIS products for global use is supported by the U.S. President’s Emergency Plan for AIDS Relief (PEPFAR) through the U.S. Centers for Disease Control (CDC) TAP central mechanism under the terms of a cooperative agreement. These products are solely the responsibility of the funding recipients and do not necessarily reflect the views of the United States Government.]

NOTE TO THE PROJECT MANAGER

[Overall, this toolkit is meant to support an Agile project management approach meaning that HIS projects are planned, designed and developed in an iterative manner in order to deliver based on the actual needs of the stakeholders and users of the product. This document is intended to be a guide of the topical areas you may need to document over the course of this HIS project. Thus, you may not have all of the information at the start of design and development, so this document will be updated over time and the team should expect this template to have many versions and to grow over time.

This document is a template of a Project Charter and Planning document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project. Feel free to simply add hyperlinks to other documents that satisfy requirements; there is no need to duplicate work.

* **<Text in Black with angle brackets to be completed by you and the project team>**
* Text in plain black is boilerplate language that can be modified or deleted. These are offered as guidance but not mandatory formats.
* [Text in fun purple is instructions for you or describes the intent. It should be deleted]
* [Text in purple with gray background are examples to guide team]

Here are the recommended steps for filling this template:

1. Replace all text enclosed in angle brackets (e.g., **<Project Name>**) with the correct information. These angle brackets appear in both the body of the document and in headers and footers.
   1. Add details by modifying the boilerplate text as appropriate to your specific project.
   2. Add new sections as needed:
      1. If you’re used to Microsoft Word you can use section headers Styles to label these additional sections so they will appear in the table of contents (e.g. Heading 1, Heading 2, Heading 3). A tutorial is available [here](https://support.microsoft.com/en-us/office/video-using-styles-in-word-9db4c0f4-2754-4294-9758-c14a0abd8cfa).
      2. To update the Table of Contents, right-click and select “Update field” and choose the option- “Update entire table”
      3. While these templates are in Microsoft Word, they can easily be added to Google Docs for collaboration.
2. Before submission of the first draft of this document,
   1. Delete this “Notes to the Project Manager” section and all instructions in purple text
   2. Consider additional sections that you would like to add. The Project Manager can determine which additions are most appropriate for this project.
3. During the project
   1. We expect this Project Charter document to be updated. Please ensure that the Project Manager updates the Version in the document title along with the Version History table as modifications are approved. We suggest that the Project Manager also keeps a copy of all previous versions of the document.
   2. Please ask questions and share feedback about these templates by emailing [hispmtoolkit@gmail.com](mailto:hispmtoolkit@gmail.com)

**Useful Links and Templates**

|  |  |  |
| --- | --- | --- |
| What | Purpose | Where |
| Gantt Chart | Outline of project steps and timeline | [PM Tool Pack](https://docs.google.com/spreadsheets/d/1x6bdkl0v0tiS_a5sTzBaxFIXVUVtvZMw/edit#gid=862329129) |
| CDC UP Project Management Template | Alternate example of how project can be | [PM Templates Pack](https://docs.google.com/spreadsheets/d/1SeJXZYu4_IseOLR4sfxQg5EAXANmD_fN/edit#gid=1667046634) |
| Risk and Issues Log | Captures both project risks and issues, and can be filled out to accompany this document | [PM Templates Pack](https://docs.google.com/spreadsheets/d/1SeJXZYu4_IseOLR4sfxQg5EAXANmD_fN/edit#gid=517946427) |
| Additional Tools |  |  |
| CDC UP Change Management Log | Used to record and manage changes to the project (scope,budget,schedule) | [PM Templates Pack](https://docs.google.com/spreadsheets/d/1SeJXZYu4_IseOLR4sfxQg5EAXANmD_fN/edit#gid=2107197577) |
| CDC UP Communications Management Plan | Communication Management practices template and checklist | [Link](https://www2.cdc.gov/cdcup/library/templates/CDC_UP_Communications_Management_Plan_Template.doc) |

**Project Planning Checklist**

* The project scope is clearly stated: the reader can easily understand what product, service, or result will be delivered by the project and what high-level activities will be performed.
* The project schedule is clear with deliverables spread over the duration of the project, following a phased approach composed of decision gates.
* Strategic risks are identified and assessed.
* Define a governance process to approve this initial project scope and plan, to support solving issues when required, to approve changes to the project (scope, artifacts, budget, schedule), and to review deliverables.
* Project roles and responsibilities are defined and assigned to individuals or groups.
* Authority relationships between team members and organizations are clearly presented
* Prior to starting the Design and Develop phase, ensure Project Charter /Project plan has appropriate sign offs from key leadership (e.g. government, implementers, and/or sponsors)
* If major changes are made to this document, please update version number and ensure key stakeholders sign off on the new version
* Begin creating a plan for the continued support and maintenance of the solution

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# INTRODUCTION

## PURPOSE OF PROJECT MANAGEMENT PLAN

The **<Project Name>** Project Management Plan (PMP) is the main planning document for all classes of projects and describes how major aspects of the project will be managed. It further refines and advances the approaches that were defined during the Initiating Phase. The PMP is a living document and should be updated continually throughout the project.

The intended audience of the **<Project Name>** Project Management Plan is all project stakeholders including the project sponsor, senior leadership and the project team.

# PROJECT DESCRIPTION

## PROJECT DESCRIPTION

[Provide a brief description of the project and its associated product. This can typically be pasted from the project proposal or the *Project Prepare* template. Also briefly state:

* the context and origin of project
* the business need for the project
* its public health/business impact,
* how the project goals align with the goals of project stakeholders, including Ministry of Health, CDC, and other core stakeholders.
* For example, state whether this product is a follow-on member of a product family, a replacement for certain existing systems, or a new, self-contained product. If the SRS defines a component of a larger system, relate the requirements of the larger system to the functionality of this software and identify interfaces between the two]

### STAKEHOLDERS AND END USERS OF THIS SOLUTION

[Describe the end users of this digital health intervention. Who will be impacted by this digital health intervention (patients? a population? a healthcare worker?). Who will use this tool? Which core stakeholder will this intervention support? How will it support them? Relate this to the description above and the scope below.

### IN-SCOPE FOR PROJECT: SOLUTION SCOPE

[List the topical areas that are in-scope for this project. Think through following categories to support review, noting that some many not be relevant for your project: Authentication and Authorization, Usability, Encryption, Audit, Interoperability, Data Validation, Scalability, Availability, Performance, Configuration, Backups, Support, Printing, Duplicate checking, Data migration]

The project will include:

* List

## OUT-OF-SCOPE FOR PROJECT

[List the topical areas that are out-of-scope or excluded for this project. This section can capture a list of future features or things that the team desires but cannot be accommodated within the project. Ideally, this is list is prioritized by the team over time so that there clear direction for next steps on software needs]

The project will **not** include:

* List

## FUNDING SOURCE

[State the source of funding for the project (e.g., grant, terrorism budget, or operational budget). This information may be included in the *Project Prepare* document.]

<Project Name> is funded by <insert funding details and Cooperative Agreement Numbers etc.>.

|  |  |  |  |
| --- | --- | --- | --- |
| **Funder** | **Component** | **Cost** | **Amount Funded** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## OBJECTIVES

[Identify what project is intended to achieve, in business and technical terms. Describe expected results of project, accomplishments, outcomes or products. These objectives should follow the SMART framework:

* Specific: what is the defined task or objective?
* Measurable: what are the standards or parameters that can be counted?
* Achievable: is this objective feasible?
* Realistic: are sufficient resources available?
* Timebound: what are the start and end dates?

For example: Objective - Improve epidemiologic analysis by providing complete data by 2021]

The objectives of the **<Project Name>** are as follows:

* [Insert Objective 1]
* [Insert Objective 2]

## HIGH-LEVEL BUSINESS REQUIREMENTS: DEFINITION OF A SUCCESS

[As this project begins, describe the functions that must be in place when the project is complete. In other words, what would make this project a success? These should be very high-level requirements. As a reminder, this is a “living document” meaning it should be updated continually as project needs change throughout the planning process. The “Business” requirements are the overall project requirements. A picture of the major groups of related requirements and how they relate, such as a top level data flow diagram or object class diagram, may be helpful.]

The following table presents the requirements that the project’s product, service or result must meet in order for the project objectives to be satisfied.

|  |  |  |
| --- | --- | --- |
| **Req. #** | **I Requirement Description** | **Why is this important** |
|  |  |  |
|  |  |  |
|  |  |  |

# PROJECT REQUIREMENTS

## REQUIREMENTS GATHERING PROCESS

Due to the project complexity, the project will follow an iterative and systematic process for understanding the needs, prioritization of meeting those needs, analysis and validation of those needs, translation of those needs to deliverables, and acceptance of the deliverables based on those needs. The following process will be managed by the Project Manager with the team to achieve the understanding needed for the deliverables throughout the execution of this project. The task work of each of these processes will be led by the Business Analyst.

* + - **STAKEHOLDERS REQUIREMENTS GATHERING:**

The following table identifies the specific stakeholders responsible for contributing to the project’s detailed requirements and outlines the draft methods for how the stakeholders’ requirements will be collected. [Note that full requirements and more details about each stakeholder will be documented in 03\_Design and Develop” template]

|  |  |  |
| --- | --- | --- |
| Stakeholder | Specific Participants | Requirement gathering method |
| Project team |  | desk reviews of relevant global standards, processes, systems, and tooling |
| Implementers |  | Workflow mapping, think-alouds |
| Developers |  |  |
| End User |  |  |
| MOH Director |  |  |
| Community of Practice / TWGs |  |  |

* **What stakeholder(s) are not involved in this project? Why aren’t they involved?** 
  + - **REQUIREMENTS ANALYSIS AND VALIDATION PROCESS:**

Using the collection of requirements, the team will break down the requirements and user stories into both functional and non-functional requirements of the systems, and identify the processes and activities that are needed to support those requirements. The resulting collection will be validated with key participants and stakeholders.

# PROJECT ORGANIZATION

## ROLES AND RESPONSIBILITIES

[Beyond project governance structure, Describe the roles and responsibilities of the project stakeholders. Please modify the roles and responsibilities listed in the table below. You may also add or remove additional stakeholders. It may be helpful to think about the distinction between direct and indirect stakeholders for this project.

* Who are the direct stakeholders of this project (e.g. those who will be directly using the technology) and how will they be involved in the project?
* Who are the indirect stakeholders of this project (e.g. those who may be affected by or benefit from technology or data, but not directly use the technology) and how will they be involved in the project?]

This section describes the key stakeholder roles supporting the project and their points of contact:

|  |  |  |
| --- | --- | --- |
| Stakeholder Name & Organization | Project Role | Project Responsibilities |
| **<Name of Person>**  **<Org>**  **<Email>** | Project Sponsor or Client  *Organization that is identifying/writing the business need/defining the project. Examples include: CDC writing the Notice of funding Opportunity (NOFO) – Or Can be the MOH, identifying a need and writing a contract for the project.)* | * Person responsible for oversight of the investment or project in its entirety. * Coordinates with appropriate staff (e.g. management and operations office, activity managers, etc.) for funding approval * Approves schedule, cost, and changes in scope (requirements) * May establish project performance measures to be used and ensures performance is within acceptable ranges * Approves investment/project documentation * Ensures compliance with host country security standards and requirements (as an alternative adopting the Security Assessment and Authorization (SA&A)) |
| **<Name of Person>**  **<Org>**  **<Email>** | Government Monitor | * Government employee who provides interface between the project team and project sponsor, and likely the Governance structure. * Serves as the single point of contact for the Project Manager to manage Project Sponsor’s day-to-day interests and reporting needs. * Works with project manager to ensure project/investment processes and decisions meet government policies and practices * Reviews results and provides recommendations to investment/project team according to Information Resource (IR) governance charter * Refer to your CDC Health Informatics Team (HIT) and CDC CGH governance for technical assistance |
| **<Name of Person>**  **<Org>**  **<Email>** | Project Manager  *This could include a Contractor Project Manager as well as an FTE Project Manager* | * Person who performs day-to-day project management and has accountability for managing project within approved scope, quality, time, and cost * Person responsible to ensure delivery of specific requirements, deliverables and customer satisfaction including all templates in HIP MAP toolkit * Core liaison across the project stakeholders * Directly contributes to and participates in the software development life cycle process including project and stage gate reviews * Plans and manages the investment/project documentation process; works with Operations Owner/Steward and Project Sponsor to complete submission requirements * Maintains information about the system’s status, outlook, performance, risk, and (as required) take needed corrective action * Mediates customer wants with reality of timeline, budget and software development iteration |
| **<Name of Person>**  **<Org>**  **<Email>** | Technical Lead | * Responsible for the technical day-to-day aspects of the system including the details of system development * Responsible for providing technical direction to the project. |
| **<Name of Person>**  **<Org>**  **<Email>** | Security Lead | * Responsible for playing the lead role for maintaining the project’s information security. * Ensures the project adheres to security standards and laws * May be based within government |
| **<Name of Person>**  **<Org>**  **<Email>** | End-users | * This is the representative(s) for direct user of this HIS project * You may consider defining several user categories based on frequency of use, subset of product functions used, technical expertise, security or privilege levels, educational level, or experience. Distinguish the most important user classes for this product from those who are less important to satisfy * May include health professionals who understand what data will be gathered and why a system is needed. They understand the needs of the organization and works with the data warehouse development team to implement those needs. Examples are:   + Ministry of Health Staff   + Physicians/Clinicians   + Nurses   + Epidemiologists   + Public Health Professionals |
| **<Name of Person>**  **<Org>**  **<Email>** |  |  |

|  |  |  |
| --- | --- | --- |
| **<Name of Person>**  **<Org>**  **<Email>** | Software Engineer | Requirements Analysis and Recommendations  Java Development  SQL  Data Modeling |
| **<Name of Person>**  **<Org>**  **<Email>** | User Interface Developer | HTML and CSS  Javascript, AJAX, etc.  Forms Development |
| **<Name of Person>**  **<Org>**  **<Email>** | Reports Developer | Jasper Reports  SQL  Data Modeling |
| **<Name of Person>**  **<Org>**  **<Email>** | Systems Engineer | Linux  Scripting Technologies (Perl, Python, etc)  Networking |
| **<Name of Person>**  **<Org>**  **<Email>** | Procurement | Procurement (hardware, infrastructure)  Contracting Negotiations |
| **<Name of Person>**  **<Org>**  **<Email>** | System Administrator | Virtual Machine and Virtual Appliances  Networking |
| **<Name of Person>**  **<Org>**  **<Email>** | User Support | Deal with issues and requests from end users  [See document for specifics](https://docs.google.com/document/d/1khNGkBjQsBFHqYRW-IxWtvKriwOqE-yHXJvfBWYdd2A/edit) (Appendix when printed) |
| **<Name of Person>**  **<Org>**  **<Email>** | HIS Trainer | Training Planning  Staff Training Needs Assessments  Curriculum Development  Coordination of Domain Experts for contributing to materials  Training Evaluation  Coordination of On-going Mentoring Resources |

## COMMUNICATIONS MANAGEMENT

[Noting the importance of communicating clear, consistent and timely information to stakeholders, the following plan will be used. This can be based on the Communications strategy from the *Prepare* stage. For more detailed tools, see the Communications Management practices guide, template, and checklist can be downloaded from the CDC UP website at <http://intranet.cdc.gov/ncphi/cdcup/>.]

**Required Documents**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Document Name** | **Purpose** | **Frequency** | **Where Stored (Link to file)** | **Person(s) Responsible for Generating** | **Person(s) Accountable for Approving** | **How will they be disseminated (once complete)** | **Who will receive the completed document?** |
| Contract |  |  |  |  |  |  |  |
| Statement of Work (SOW) |  |  |  |  |  |  |  |
| External - Donor Report |  |  |  |  |  |  |  |
| Internal Report |  |  |  |  |  |  |  |
| Trip Reports |  |  |  |  |  |  |  |
| Technical Working Group Meeting Minutes |  |  |  |  |  |  |  |
| Document Repository (e.g. a Wiki or shared drive) | Location for where all the project related documents are stored |  |  |  |  |  |  |

**Meeting Schedule**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **What** | **Purpose** | **Frequency (When)** | **Who** | **How Meet** |
| Project Management call | Overall project management  Review Project Risk, Issues, and Change Log | Daily, 9am |  | Zoom |
| Internal project call |  |  |  | Conference ROom |
| Internal Technical Team Call |  |  |  |  |
| Community Call |  |  |  |  |
| External Project Team Call |  | 4pm Every 2nd Tuesday |  |  |

## PROJECT SCHEDULE MANAGEMENT

[Outline the person responsible for managing the project schedule. Refer to the Preparation template for details as this person may have been identified earlier]

|  |  |
| --- | --- |
| Name of Schedule Manager |  |
| Schedule Manager Contact Information | Email:  Phone:  Whatsapp: |
| How frequently will the schedule be revised? |  |
| Who needs to be informed if the schedule changes?  [Be specific if there are particular stakeholders or specific situations. Any unacceptable increase in schedule should be reviewed according to the project’s Change Control processes.] |  |

## PROJECT CHANGE MANAGEMENT PROCESSES

[Change Control processes outlines how change requests will be identified, tracked, approved and prioritized. Changes may include things like changes to the project’s original scope, budget, schedule, or staffing. It generally involves redefining existing objectives and deliverables or specifying new project objectives and deliverables; which may in turn impact cost, schedule, and/or staffing. There is a sample Risk-Issues-Change Management Log available in the [PM tools](https://docs.google.com/spreadsheets/d/1SeJXZYu4_IseOLR4sfxQg5EAXANmD_fN/edit#gid=517946427).

* How will change requests be initiated? [e.g. via email, during meetings, project management software]
* How will change requests be logged and tracked?
* How will change requests be assigned to personnel so that they may analyze the level of effort required and recommendations?

## MAJOR DELIVERABLES/MILESTONES

[Provide a list of the major deliverables that will be completed by the end of this project. A deliverable is a tangible, verifiable outcome of work that achieves an objective. The existence of one or more deliverables proves that an objective has been reached. To be verifiable, the deliverable must meet predetermined standards for its completion, such as a design specification for a product or a checklist of steps that is completed as part of a service. Certain projects may choose to focus on overall product deliverables as opposed to individual project deliverables.]

## PROJECT SCHEDULE

[Building upon the draft schedule from the PRELIMINARY PROJECT SCHEDULE AND WORK BREAKDOWN section of the *Planning* Template, please build out a more detailed project schedule. A project schedule is the agreed upon set of tasks and due dates used to guide and monitor the project to completion. There are many formats and software that can support project schedule development. Basic project schedules should contain tasks, due dates, who is responsible, and overall deadlines. A [Gantt Chart from the PM Templates Pack](https://docs.google.com/spreadsheets/d/1SeJXZYu4_IseOLR4sfxQg5EAXANmD_fN/edit#gid=381849707) can support this project. APPENDIX D: List Of Project Management Software.

Checklist for areas to include in the Project Schedule

* + adding project health checks / add template to PM pack
  + adding communications needs / meetings etc
  + adding reasonable buffers to delivery timelines to allow for unplanned for events

# IMPLEMENTATION & DISPOSITION PLANNING

## DEPLOYMENT PLAN

[This section can be detailed or broad, formal or informal and will describe the approach that will be used to deploy the product or service. For example, if the project involves deploying an application to state health partners, this section would discuss the approach for rolling out the application to the end users, including conducting environmental assessments, developing memorandums of understanding, hardware/software installation, and data conversion.]

## TRANSITION AND PROJECT CLOSE DOWN PLANNING

[Recognizing that this is a project, begin to think about how the system will be transitioned. What impact will the end of this project have on stakeholders? How can the team prepare for this transition early on? How will the project be transitioned and to whom? What records need to be documented? ]

This project will be transitioned to <INSERT>. The goal is to provide sufficient support and transfer necessary skills and knowledge to the MOH so that they own the solution product and sustain future development, maintenance, and management of the solution. In the future phases, we will create a detailed transition plan after the solution is developed. The transition plan will include details about:

* + - What skills and knowledge that we need to transfer to the MOH through training and capacity building
    - Estimates of the time and resources needed for sustainment

# POLICY AND LAW COMPLIANCE PLANNING

[Building upon the section from the Project Preparation plan, This section provokes a review of how the project will comply with local and international policies and laws. Which specific policies comply? What procedures are required? Does the funder have any specific policies required? Suggest that Project Manager adds compliance review checkpoints into the project Gantt chart to ensure that compliance is routinely assessed]

|  |  |  |  |
| --- | --- | --- | --- |
| Policy | Short Policy Purpose | Link to Policy | How will this project comply? |
| International Standards |  |  |  |
| Data Privacy and Security Policy |  |  |  |
| IT Policy |  |  |  |
| Enterprise Architecture: HIS Policy |  |  |  |
| Digital Health Strategy |  |  |  |
| Stakeholder- related policies |  |  |  |
| Capital Planning and Investment |  |  |  |
|  |  |  |  |

# PROJECT RISK AND ISSUES MANAGEMENT

[Both project risks and issues are important to identify and manage for project success. The following section supports initial identification of project risks and outlines a process for continually reviewing, identifying risks and issues related to the project.

* **Risk**: initially (in this template) the team should think ahead to identify potential problems that may occur and impact the project. These risks haven’t happened yet but should be anticipated and planned for to support project success. Risks can be identified at any point during the project.
* **Issues**: is a known problem that is occurring and requires a plan to address. Here’s a helpful resource differentiating risks and issues: [link](https://simplicable.com/new/risk-vs-issue) ]

## RISK, ISSUE, AND CHANGE MANAGEMENT

[A Risk, Issue, and Change Log should be used to document, monitor and track risks and issues. A template can be found in the [PM Tool Pack](https://docs.google.com/spreadsheets/d/1x6bdkl0v0tiS_a5sTzBaxFIXVUVtvZMw/edit#gid=862329129). Please outline how risks will be logged and managed below. ]

The project team has identified the following risks, issues and changes that may impact the direction of, activities within, or delivery of the project. The risks will be documented in <<add place>> [Consider documenting in the PM Tools Risk and Issues Log].

|  |  |
| --- | --- |
| How will risks and issues be logged and managed? |  |
| Name of Person who Manages Log |  |
| At which meeting(s) will this Log be reviewed? |  |

## 

## RISK PLANNING

[At this stage in planning, please think through and document any risks, assumption(s), or constraints that may have significant impact on the project if proven incorrect.

* **Assumptions** are circumstances and events that need to occur for the project to be successful, but are outside the total control of the project team
* **Constraint:** anything that may restrict, limit, or regulate the project. Generally constraints are outside the total control of the project team.

Some items to consider when identifying the assumptions and constraints are:

* Schedule
* Budget
* Resource availability and skill sets,
* Software and other technology to be reused or purchased,
* Constraints associated with product interfaces ]

For each of these risks, the team will analyze both the impact that it could have on the project and the probability of the risk occurring. The matrix of this analysis will identify which of those risks have both high impact and high probability, thus considered a major risk and prioritized for mitigation and contingency planning. Each major risk will be monitored throughout the project by the project manager, and reported upon when relevant throughout the project lifecycle to the project team, project leadership, and stakeholders.

For each major risk, one of the following approaches will be selected to address it:

* Critical: high impact on project, so must work with team to eliminate the risk
* High: identify ways to reduce probability of this risk
* Medium: consider ways to mitigate
* Low: continue monitoring risk throughout project and escalate as needed

|  |  |  |
| --- | --- | --- |
| Risk | Priority | Risk Plan |
| Consumer concerns about electronic health records, health information exchange and privacy/consent policies | Critical | Project Manager will monitor the scope and effectiveness of the consumer engagement and communications program. Project Manager, with input from the Digital Health interoperability task team, will implement a consumer engagement and communication plan focused on educating consumers regarding the benefits of electronic records and information exchange in improving the quality and safety of health care services. |
| Unanticipated future policy or reform initiatives may influence HIE participation and participant connectivity. | High | Project Manager with support from the legal task team of the digital health TWG will monitor the legal health reform efforts on HIE functions, services and participation. |
| Reluctance to change standards or move to expected standards. | Medium | Project Manager will consider impacts of new standard specifications on existing systems along with implementation priorities and timeframes. |
| Lack of compliance due to changing legal/ regulatory landscape. | Medium | Project Manager through the legal task team of the Digital Health TWG will monitor the impacts of any compliance issues due to a changing legal/regulatory landscape and develop strategies and recommendations related to the provision of HIE services. |
| Failure to transition from “start-up” mode to on-going operation, resulting in unreliable services and unstable standards | Low | Project Manager will closely monitor the establishment of the HIE, initial operations including implementation of planned services, technical and performance standards to assure an effective transition to ongoing operations with reliable and stable services. |

# EVALUATION PLANNING

[Before an implementation begins, it should be determined what the definition of success is and how it will be evaluated. This section is to help the team think ahead. To ensure that the project also meets its intended purpose, describe here the plan to ensure the project complies with any policies, laws, and/or layout any broader evaluation plans to test if/how the project intends to meet the needs. How will the team ensure that the project is adhering to those requirements? Additionally, if success includes how users are actually interacting with the system, then how do you measure that - by amount of time spent on the system, by number of errors or omissions, by delay in entry of data? Success can even be measured at predefined graduated levels of implementation, since some sites may never get to the same level as other sites due to environment, budget, skills, or other considerations. The following is a list of example factors that may be considered in measuring success of an implementation.

* Completion of components in the implementation plan (site assessment, installation, etc)
* Trainings conducted (HF Manager Orientation, System Administration, etc)
* User training evaluations (did users skills and knowledge improve?)
* Use of the system
  + Regular logins to the system
  + # of charts entered by user per time period
  + # of reports generated
* Infrastructure and system performance
  + system availability / uptime
  + power outages - duration and frequency
* User Satisfaction Surveys
* User and System Issue Response and Resolution
* Data Migration and Data Reconstruction Completion and Accuracy
* Data Quality
  + % errors
  + % missing data
  + time difference between encounter and entry of data
* Clinical Care Improvements]

Given that this project will <insert objective> the project will be evaluated to understand….

# 

## 

# APPENDIX A: PROJECT MANAGEMENT PLAN APPROVAL

The undersigned acknowledge they have reviewed the ***<Project Name>*** Project Management Plan and agree with the approach it presents. Changes to this Project Management Plan will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired (e.g. government, implementers, and/or sponsors). Examples of such individuals are Project Manager, Government officials, Implementing Partners, or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |
| Print Name: |  |  |  |
| Title: |  |  |  |
| Role: |  |  |  |

# APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name and Version** | **Description** | **Location** |
| <Document Name and Version Number> | [Provide description of the document] | <URL or Network path where document is located> |

# APPENDIX C: KEY TERMS

[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.http://www2.cdc.gov/cdcup/library/other/help.htm

The following table provides definitions for terms relevant to this document.

|  |  |
| --- | --- |
| Term | Definition |
| [Insert Term] | [Provide definition of the term used in this document.] |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |
| *[Insert Term]* | *[Provide definition of the term used in this document.]* |