

**PRACTICE INTEGRATION
PROJECT PLAN**

		Status	Start Date	Due Date	Responsible Person	Comments
PRACTICE INTEGRATION		0.00%				
1.0	Project Management	0.00%				
	Conduct Practice Assessment	0.00%				
	Establish Weekly Meetings	0.00%				
	Develop Workplan / Add to Master WP	0.00%				
	Status Reports	0.00%				
2.0	Human Resources	0.00%				
2.1	Employment	0.00%				
	Employment Packet	0.00%				
	Employee Release of Information	0.00%				
	Job Profile	0.00%				
	Offer letter	0.00%				
	W-4	0.00%				
	I-9	0.00%				
	Copy of Social Security Card	0.00%				
	Copy of Driver's license	0.00%				
	Medical Exam Form	0.00%				
	Direct Deposit forms	0.00%				
	Tech Time Instructions	0.00%				
	New Employee General Information	0.00%				
	Employee Handbook	0.00%				
	Badges	0.00%				
2.2	Physicals / Drug Screens	0.00%				
	Copy of immunizations	0.00%				
	TB shots in last 90 days	0.00%				
	Develop sign up sheet	0.00%				
	Schedule doctors	0.00%				
2.3	Compensation	0.00%				
	Mapping of job description to job profile	0.00%				
	Equity Analysis Worksheet completed by employees	0.00%				
	Equity Placement with salary ranges	0.00%				
2.4	Benefits	0.00%				
	Benefits Overview Sheet	0.00%				
	Develop Q & A Sheet	0.00%				
	Send out Benefit Enrollment Packet	0.00%				
	Conduct Enrollment Meetings	0.00%				
	Shared Security Packet	0.00%				

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PRACTICE INTEGRATION		0.00%				
3.0	IS	0.00%				
	Determine IS needs / cost	0.00%				
	Install Tech Time on a machine	0.00%				
	Submit names for email/novell/epic log ins	0.00%				
	Access codes assigned	0.00%				
	Order and Install Printers and PCs	0.00%				
	Notify Help Desk of New Practice	0.00%				
	Determine Site PM System and Health System Compatibility	0.00%				
	Install PMM	0.00%				
	Determine who needs Reflections	0.00%				
	Order Licenses for Reflections	0.00%				
	Install PCs and Printers	0.00%				
	Define Printers/PCs on the Network	0.00%				
	Define Printers/PCs in Epic	0.00%				
	Get Label Printers Working	0.00%				
	Get Software Licenses Approved	0.00%				
	Evaluate current system	0.00%				
	Determine IS needs / cost	0.00%				
	Order T-1 Line	0.00%				
	Time Clock Ordered	0.00%				
	Time Clock Installed	0.00%				
		0.00%				
4.0	Telecommunications	0.00%				
	Evaluation of tele system/cost	0.00%				
	Determine if addtl lines are needed	0.00%				
	Set up phone tree	0.00%				
	Set up answering service	0.00%				
	Publish list of telephone numbers	0.00%				
	Update intranet telephone directory	0.00%				
	Standardize menu	0.00%				
	Identify standard tel reports & determine if sufficient	0.00%				
	Determine if (or need to be) connected to main switch	0.00%				
	Determine vendor to support phone system:	0.00%				
	Determine what phone number will be used at the Site	0.00%				
		0.00%				

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PRACTICE INTEGRATION		0.00%				
5.0	Finance	0.00%				
	Contingency capital approved	0.00%				
	Minor capital approved	0.00%				
	Set up cash accounts	0.00%				
	Develop operations budget	0.00%				
	Set up Chart of Accounts	0.00%				
	Establish/publish account codes	0.00%				
	Identify reporting info needs from/to Site	0.00%				
	Project # Assigned	0.00%				
	Identify/train timekeeper	0.00%				
	Set-up Payroll	0.00%				
	Practice Administrator Orientation	0.00%				
	Reimburse for Petty Cash funds	0.00%				
	Order deposit slips/stamps	0.00%				
	Activate G/L	0.00%				
	Set up credit card machines	0.00%				
		0.00%				
6.0	Facilities	0.00%				
	Housekeeping notified – not needed	0.00%				
	Security at Site notified	0.00%				
	Security Procedures put in place	0.00%				
	Maintenance notified	0.00%				
	Maintenance at Site put in place	0.00%				
	Sublease negotiated and signed	0.00%				

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	PRACTICE INTEGRATION	0.00%				
7.0	Epic Set Up	0.00%				
7.1	Resolute	0.00%				
	Need Charge Master –	0.00%				
	Add in codes and RVUs	0.00%				
	Superbills with TIN (future design)	0.00%				
	Determine number of superbills needed	0.00%				
	Review Process with staff and Providers re superbill	0.00%				
	New location and depts - GL?	0.00%				
	Add providers in EPIC	0.00%				
	Set up as Non Split bill	0.00%				
	Charge Posters training after Go Live	0.00%				
	Train Employees on Resolute	0.00%				
	Set up Work Queues	0.00%				
	Charge poster's book	0.00%				
	On site for go live team identified	0.00%				
	Evaluate use of MediFax vs Mevsnet	0.00%				
7.2	Appointment Scheduling Application	0.00%				
	Learning Ctr Room scheduled for training	0.00%				
	Determine Practice Management Security Level for all Employees	0.00%				
	Provider templates and Surgery	0.00%				
	Nurse Visit Templates	0.00%				
	Plan for adding patients / schedules into EPIC	0.00%				
	Print appointment schedules for conversion	0.00%				
	Print face sheets for appointment conversion	0.00%				
	Manual Appointment Conversion	0.00%				
	Set up Center in Cadence	0.00%				
	On site for go live team identified	0.00%				
	Determine if Dress Rehearsal is needed	0.00%				
	Conduct Dress Rehearsal	0.00%				

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PRACTICE INTEGRATION	0.00%				
8.0					
Credentiailling (MD Orientation, Photos taken outstanding)	0.00%				
DEA Application	0.00%				
CSR application	0.00%				
Medicaid/Medicare Prov #'s – application filed	0.00%				
Hospital privileges –send notification	0.00%				
Payors notification	0.00%				
Directories Updated	0.00%				
Physician Orientation (full day)	0.00%				
	0.00%				
9.0					
Equipment	0.00%				
Complete Capital Request form	0.00%				
Submit minor capital request to Minor Cap	0.00%				
Approve Capital Request on-line	0.00%				
Walk-thru review of equip	0.00%				
Establish equip value	0.00%				
Determine equip needs/cost/priority	0.00%				
Crash cart inspection: Determine level of response	0.00%				
Need to know about supplies	0.00%				
10.0					
Compliance	0.00%				
Inspections / Licenses	0.00%				
Safety	0.00%				
Infection Control	0.00%				
Quality	0.00%				
BioMed	0.00%				
Pharmacy	0.00%				
CLIA	0.00%				
HIPAA license	0.00%				
Worker's Compensation	0.00%				
Security	0.00%				
Obtain Business Occupancy License	0.00%				
Review Nursing Skill Performance	0.00%				
11.0					
Legal/Contracting Issues	0.00%				
Finalize Contract	0.00%				
Determine assignability of any contracts	0.00%				
Establish insurance (facility/MD/nurses/directors, etc)	0.00%				
Copy sub lease for legal/ real estate	0.00%				
Current landlord notified	0.00%				
Risk Mgmt Assessment	0.00%				

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	PRACTICE INTEGRATION	0.00%				
12.0	Marketing and Communication	0.00%				
12.1	General	0.00%				
	Site Name:	0.00%				
	Draft letter to patients	0.00%				
	Signage : Temporary and Permanent	0.00%				
	Pictures taken	0.00%				
	Advertising needs assessed	0.00%				
12.2	Internal Communication	0.00%				
	Intranet announcement	0.00%				
	Photo of staff	0.00%				
	System newsletter	0.00%				
	Web Site	0.00%				
12.3	External Communication	0.00%				
	Press Release	0.00%				
	Notice to patients	0.00%				
	Develop front desk / telephone script	0.00%				
13.0	Training / Learning Center	0.0%				
	Practice Management	0.00%				
	List all annual tests	0.00%				
	HIPAA	0.00%				
	Compliance	0.00%				
	Safety	0.00%				
	System orientation	0.00%				
	EMTALA	0.00%				
	Purchasing Training	0.00%				
	Provider Orientation	0.00%				
	Clinical Competencies	0.00%				
	Leadership	0.00%				
	Explore Sample Drug Program	0.00%				
	In-Pod Testing	0.00%				
14.0	Orientation	0.00%				
	Nursing	0.00%				
	Non-Nursing	0.00%				
15.0	Post Go Live Stabilization	0.0%				
	Visit during the week	0.00%				

