## INTELLECT Inferno

## Kids Center of pediatric therapies

# project management plan

# Document Control

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## Document Approvals

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| Project Review Group | Intellect-Inferno | I-I | 1/25/2024 |
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# Executive Summary

The objective of this project is to implement a Tracking & Notification system for Floater Patients, aimed at revolutionizing the management of open appointment slots within the clinic. The system's primary focus is to provide floater patients with timely notifications about available appointment slots, thereby enhancing accessibility and convenience and enabling patients to efficiently self-schedule appointments.

The project encompasses several key components, starting with the exploration of diverse solutions. This includes researching and evaluating options such as a dedicated application or integration with the existing Electronic Medical Record (EMR) system for appointment reminders. Additionally, the project will involve the implementation of text and email notification solutions to facilitate seamless communication with patients regarding available appointment slots.

The anticipated benefits of this project are significant. Firstly, it is expected to improve clinic operations by streamlining appointment scheduling processes, leading to increased efficiency. Secondly, the system aims to enhance patient satisfaction levels by providing them with proactive notifications and self-scheduling options, thereby improving their overall experience with the clinic. Lastly, the project aims to optimize healthcare delivery within the clinic by leveraging innovative technologies and strategies to improve appointment scheduling processes.

Key objectives of the project include enhancing patient engagement, increasing clinic efficiency, and improving healthcare accessibility. By empowering patients with convenient appointment scheduling options and automating notification processes, the project aims to increase patient engagement. This, coupled with improved clinic efficiency through automated scheduling, will contribute to a better overall experience for both patients and clinic staff. Ultimately, the project seeks to improve healthcare accessibility by enabling patients to easily access and schedule appointments based on their preferences and availability.

In conclusion, through collaborative efforts and strategic planning, the Tracking & Notification system project aims to deliver tangible benefits to patients and clinic staff alike. By leveraging innovative technologies and focusing on enhancing communication and accessibility, the project seeks to revolutionize appointment scheduling processes, improve patient satisfaction, and optimize overall healthcare delivery within the clinic.

# Project Scope

|  |  |
| --- | --- |
| **Phase** | **Key Activities** |
| *Scope Overview* | *The project aims to implement a Tracking & Notification system for Floater Patients, facilitating efficient management of open appointment slots. The system will enable floater patients to receive notifications when openings occur on the appointment calendar, allowing them to schedule themselves for available slots. Key components of the project include exploring various solutions such as a dedicated application, Excel-based tools, integration with the existing Electronic Medical Record (EMR) system for appointment reminders, and the implementation of text and email notification solutions.* |
| *Scope Statement* | *The scope of this project encompasses the development and implementation of a Tracking & Notification system for Floater Patients. This system will enable real-time notification of available appointment slots to floater patients, empowering them to self-schedule for openings. The project will explore different solutions, including the development of a dedicated application, utilization of Excel-based tools, integration with the existing EMR system for appointment reminders, and the implementation of text and email notification solutions. The project excludes the development of the EMR system (Fusion), billing functionalities, and website development, as these elements are already in place.* |
| *In-Scope Items* | 1. *Development of a Tracking & Notification system for Floater Patients.* 2. *Implementation of a notification mechanism for informing floater patients about available appointment slots.* 3. *Integration with the existing Electronic Medical Record (EMR) system for appointment reminders.* 4. *Exploration of various solutions, including the development of a dedicated application, utilization of Excel-based tools, and implementation of text and email notification solutions.* |
| *Out-Of-Scope Items* | 1. *Development of the EMR system (Fusion).* 2. *Billing functionalities.* 3. *Website development.* |

# Requirement management plan

Our requirement management plan allows us to semi-resemble our planning phase for the project. It will outline how our requirements will be identified, documented managed, and verified throughout the project. Basically, this plan will help ensure that the project team understands how the requirements will be handled.



# Project Charter and statement of work

Our Project Charter sets the tone for the entire project. It includes information such as project objectives, stakeholders, and initial project requirements. The SOW is closely related to the project’s scope and objectives. We want the project charter and statement of work to be as closely related as possible. Below are the embedded objects that will lead you to the documents.



# Project life cycle:

|  |  |  |
| --- | --- | --- |
| **Phase** | **Key Activities** | **Key Deliverables** |
| *Initiation Phase* | *Finding project scope and stakeholders* | *Project Charter, project plan* |
| *Planning Phase* | *Develop project management plan, create project schedule, define roles, allocate resources* | *Project management plan* |
| *Execution Phase* | *Carry out project activities, manage resources, monitor and control project performance, and communicate progress to stakeholders.* | *Work packages, progress reports, issue logs* |

|  |  |  |  |
| --- | --- | --- | --- |
| **Phase** | **Reviews** | **Entry Criteria** | **Exit Criteria** |
| *Monitor and control phase* | *Performance review meetings* | *Approved project management plan.* | *Performance within acceptable limits, change requests approved.* |
| *Closing phase* | *Project closure review* | *Approved project management plan* | *Client acceptance* |
| *Post-implementation review* | *Evaluate project’s success* | *Project closure report* | *Completed review report* |

# development approaches:

|  |  |
| --- | --- |
| **Deliverable** | **Development Approach** |
| *Project charter* | *The project charter is a foundational document that outlines the project's purpose, scope, objectives, and stakeholders. The traditional waterfall method is appropriate for creating the charter, as it involves defining these aspects upfront and obtaining approval before moving to the next phase.* |
| *Project management plan* | *The project management plan involves detailed planning, which can benefit from an iterative approach to refine details as more information becomes available. Agile principles may be incorporated for aspects like resource allocation and risk management to allow for adaptability.* |
| *Statement of work* | *The Statement of Work typically involves a thorough and detailed upfront analysis of the project requirements, objectives, and scope. The traditional waterfall method is well-suited for creating the SOW because it allows for a structured and sequential approach to defining the project details before moving into the execution phase.* |

# subsidiary management plans:

|  |  |
| --- | --- |
| **Name** | **Comment** |
| **Scope** | [*Scope Management Plan Template*](https://www.stakeholdermap.com/project-templates/scope-management-plan-template.html) |
| **Time** | **3 Months** |
| **Budget** | **N/A** |
| **Communications** | **Discord for Video Conference- Biweekly**  **GroupMe for Text Messaging** |
| **Risk Matrix** | **See Below** |
| **Procurement** | **N/A** |
| **Stakeholders** | **Kids Center** |
| **Other Plans** | **N/A** |

# RISK MATRIX:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Risk ID | Risk Description | Likelihood (L) | Impact (I) | Risk Level (L x I) | Mitigation Strategies | Contingency Plans |
| R1 | Team member turnover | High | Moderate | High | Regular team check-ins to address concerns. | Identify backup team members. |
| R2 | Miscommunication within the team | Moderate | High | High | Establish clear communication channels and protocols. | Implement project management tools. |
| R3 | Technology failure (e.g., server crashes) | Low | High | Moderate | Regular system backups and contingency IT support. | Identify alternative communication methods. (Text or email) |
| R4 | Scope changes or additions | Moderate | Moderate | Moderate | Clearly define and document the project scope. | Assess impact on schedule and budget. |
| R5 | Conflicts among team members | Moderate | Moderate | Moderate | Facilitate conflict resolution discussions. | Involve a neutral mediator if necessary. |
| R6 | External dependencies (e.g., third-party tools) | Moderate | High | High | Identify alternative tools or have a backup plan. | Keep open communication with third parties. |
| R7 | Insufficient resources (e.g., time or budget) | High | High | High | Regularly monitor resource utilization and adjust plans. | Secure additional resources if necessary. |
| R8 | Poor quality deliverables | Moderate | High | High | Implement quality assurance processes. | Allocate time for thorough reviews. |

# baselines:

|  |  |  |
| --- | --- | --- |
| Scope Baseline | Project scope statement, Work Breakdown Structure (WBS), and WBS dictionary. | Implementation of the Tracking & Notification system for Floater Patients. |
| Schedule Baseline | Project schedule, including start and end dates for each task and milestones. | We want to be able to complete each section of the project quarterly throughout a 4-month period. With updates each month. |
| Cost baseline | Budget estimate, including cost estimates for each task or work package. | We want to keep costs low for the client while using the best software we can find through research. |

# Requirement Trace Matrix

This RTM will help trace and link the project requirements back to their source and ensure that each requirement is addressed within the project.



# ERD



This representation provides a visual understanding of how the entities are related and how the flow of data occurs within the system, starting from the user logging in to the system until the patient is contacted through their provided contact information accessed from the floater schedule.

# UFD



This UFD will outline the functionalities or features of the project from the user’s perspective. Starting with the process of the floater patient receiving an alert about an available appointment opening and concluding with the selection being recorded in the clinic's database. This user-friendly system aims to enhance and optimize clinic workflow and maintain the efficient scheduling practices we are hoping to achieve.

# SAD



This SAD will provide a comprehensive overview of the architecture of the systems structure. It includes everything from the outlines, the structure, the components, the relationships, and the interactions within our system. Everything we planned will be implemented with WordPress as the center control where it will branch out to the MemberPress database and the Bookly Scheduling System. Using Zapier as the point of contact for all the software.

# status Report

The Notification system for floater patients has made substantial progress during the period we had to work with key achievements including comprehensive research on solution options, successful integration of text and email notifications, and the development of a prototype for testing and feedback. Milestones such as finalizing project scope, conducting user acceptance testing, and integrating with the existing EMR system have been reached. Challenges related to technical integrations and resource constraints were encountered but are being actively addressed. The upcoming milestones focus on final system deployment, user training, and gathering post-deployment feedback for iterative improvements. Overall, the project is on track, and working accordingly to plan.



# Project Budget

Zapier: $50 a month for around 2,000 tasks a month​

Clicksend: $1,500 for 100,000+ SMS, should last about 2 years​

Bookly PRO: $89 for a one-time fee​

Annual Costs: Roughly $1440 for first year, then every year after $1350. ​

Not including pricing for WordPress Hosting or Domain Hosting​

# Conclusion

In conclusion, the development and impending implementation of the notification and scheduling system for our pediatric therapies center mark a significant step forward in improving service delivery and patient experience. Through meticulous planning, stakeholder collaboration, and technological innovation, we have successfully navigated through the various stages of requirements gathering, solution exploration, and prototype development. The achievement of key milestones, such as the integration of communication channels and the design of user-friendly interfaces, underscores our commitment to enhancing accessibility and efficiency within our center.