# Project Summary

| Project Name | | Project Number |
| --- | --- | --- |
| Chocolate anonymous | | 1 |
| Project Start Date | Project End Date | Executive Sponsor |
| 5/28/2018 | 8/15/2018 |  |
|  | | |
| **Business Issue and / or Opportunity:**  ChocAn currently handles a lot of paperwork manually as well as member verification and member account management, we aim to make this process easier for all parties involved by creating a datacenter to handle the manual work done by providers, in doing so we hope to increase patient satisifaction and adherence.  **Purpose:**  Chocoholics Anonymous currently handles all data manually. Providers have to manually log all information about their visits and manually verify member status. We will create software to stream line the process to make it more efficient for the organization as a whole. We will do this by creating a data center for all relevant parties to access data.  **Current State:**  Currently chocAn has members go to providers, the provider using a terminal to verify the users membership status. The provider will also later on enter in the service done and any relvent comments and then have the member re swipe and create a recpit for them, at chocAn there will be someone manuly logging all the data and creating weekly reports to send out, one to each provider that billed chocAn that week, and member who used a service, and also a report for chocAn records.  **Proposed Future State:**  The future state of chocAn will include making this automated. When a member recives a service that will be automatically saved into the data center and sorted. It can be searched at any moment by the chocAn manager. And weekly the software will automatically create the reports and send them out to members who received a service, and providers who provided the service. Also the terminal will allow them to put in service code and comments. | | |
|  | | |
| **project Goal** (one paragraph summary of problem issue/solution):  The primary goal of this project is to make the chocAn company more efficient in their day to day processes. First off the providers currently handle all billing and paperwork manually, our aim is to delegate all “busy” work to a datacenter in order to make the providers job easier.In The current state of the company the provider takes to long with patients verifying membership as well as logging all necessary information manually which in tern reduces the likelihood that a patient will reschedule an appointment, by making it easier for the provider we hope to increase patient adherence in the longterm. | | |
| **Principal Project Objectives** | | |
| 1. Increase efficiency of chocAn Company 2. Reduce provider PaperWork 3. Increase patient adherence 4. Automated weekly reports | | |
| **Principal Project Deliverables** | | |
| **Objective 1 – Increase efficiency of chocAn Company**  1.1.1 store Member status into a single integrated software inside of ChocAn Datacenter, name of the software is DataAn.  1.1.2 Allow Provider Terminal to communicate with aforementioned software  1.1.3 allow Acme Company to edit Membership status of patients  1.2.1 Allow Provider access to view member status through provider terminal  1.3.1 provider records should have the ability to be added deleted and updated during the interactive mode. | | |
| **Objective 2 – Reduce provider PaperWork**   * + 1. allow DataAn the ability to store all relevant information about the Providers visit     2. Allow the terminal to communicate necessary information to the DataAn Software.     3. Write to disk a record containing all EFT data for banking computers and weekly reports based on the providers services | | |
| **Objective 3 - Increase patient adherence**  3.1.1 Create an interactive mode during the work day (9am-5pm)  3.1.2 allow interactive mode to be used by employees to update relevant membership information  3.1.3 Store a provider directory containing relevant information about billing codes and services to be sent to the providers terminal and email. | | |
| **Objecitve 4- Automated weekly reports**  4.1.1 Each member who has consulted a ChocAn provider during that week receives a list of  services provided to that member, sorted in order of service date. The report, is  sent as an e-mail attachment.  4.1.2 Each provider who has billed ChocAn during that week receives a report, sent as an  e-mail attachment, containing the list of services he or she provided to ChocAn members.  To simplify the task of verification, the report contains the same information as that entered  on the provider’s form, in the order that the data were received by the computer. At the end  of the report is a summary including the number of consultations with members and the  total fee for that week.   * + 1. A summary report is given to the manager for accounts payable. The report lists every provider to be paid that week, the number of consultations each had, and his or her total fee for that week. Finally, the total number of providers who provided services, the total number of consultations, and the overall fee total are printed.     2. Allow manager terminal to access Desired weekly reports | | |
| Benefits (list hard and soft benefits) | | |
| * Less time and money spent on providers * decrease in man made errors * Increased provider and member adherence * Company will look upto date with current technology * More patient satisfaction due to efficiency in everyday processes, and more member recruitment | | |
| Metrics to Measure Project Results | | |
| * Increase of Average time spent actually consulting patients * Time spent on patient records and other paperwork * Higher patient adherence and increased new member recruitment * higher job satisfaction ratings by providers. * Better patient satisfaction | | |
| Project Risks (details in risk table) | | |
| * Might be Short one team member due to possible drop status * Not enough work done due to inability to sync schedules * Project performance not 100% due to members fasting * Project scheduling will become hard to deal with due all members having a class currently or starting soon * Team Leader going on vacation. Work load will be assigned to someone else. | | |
| Related Projects | | |
| None | | |
| Project Teams/Support Teams | | |
| * 80% Code 20% Thought | | |
|  | | |

# Project Scope

## Project Objectives & Deliverables Matrix

| **Objective/ Deliverable Matrix** | **Responsible for Delivery** | **Supporting Team(s)** | **Receiving Team(s)** | **Delivery Date** |
| --- | --- | --- | --- | --- |
| **Objective 1:**  Increase efficiency of chocAn Company  efficiency of chocAn Company | Ali T, Mohamed | NA | NA | 6/5/2018 |
| **Deliverable 1.1.1:** …. | Mohamed |  |  | 5/30/2018 |
| **Deliverable 1.1.2:** …. ….. | Mohamed |  |  | 5/30/2018 |
| **Deliverable 1.1.3:** …. | Ali T |  |  | 6/5/2018 |
| **Deliverable 1.2.1:** …. | Ali T |  |  | 6/5/2018 |
| **Deliverable 1.3.1:** …. | Ali T |  |  | 6/5/2018 |
| **Objective 2:**  Reduce provider PaperWork | Hassan | NA | NA | 6/25/2018 |
| **Deliverable 2.1.1** …. | Hassan |  |  | 6/25/2018 |
| **Deliverable 2.1.2** …. | Ali a |  |  | 6/25/2018 |
| **Deliverable 2.1.3 …. ….** | Mohamad |  |  | 6/25/2018 |
| **Objective 3:**  Increase patient adherence | Ali A, Hassan | NA | NA | 7/15/2018 |
| **Deliverable 3.1.1 …….** | Hassan |  |  | 7/10/2018 |
| **Deliverable 3.1.2 …….** | Ali A |  |  | 7/15/2018 |
| **Deliverable 3.1.3 …….** | Ali A |  |  | 7/15/2018 |
| **Objective 4:**  Automated weekly reports | Ali A, Hassan, Mohamed | NA | NA | 8/15/2018 |
| **Deliverable 4.1.1 …..** | Mohamed |  |  | 7/25/2018 |
| **Deliverable 4.1.2……** | Ali A |  |  | 8/10/2018 |
| **Deliverable 4.2.1……** | Hassan |  |  | 8/15/2018 |
| **Deliverable 4.2.2…..** | Hassan |  |  | 8/15/2018 |

## Exclude from Project

* Prover/manager terminal creation
* Banking functions such as depositing money into the account (3rd party will handle that from our data)
* Billing monthly fees and keeping track of accounts that paid and that didn’t pay their monthly fee.
* Webste development
* Mobile application development

## Assumptions

* We are assuming one provider meets with one customer at a time
* we are assuming the managers only function from our point of view is to print reports off of his/her manager terminal
* manager terminal only prints reports
* in the current state of the company the provider currently verifies member eligibility manually
* the provider currently manually sends each member reports of services rendered
* we are handling the provider directory
* we will be storing EFT Data to a disk in the datacenter and send that information to banking institutions
* work day begins at 9am and ends 5pm

## External Time Constraints

* end of the semester

## Financials (Costs and Benefits)

See Business Case.

# Risk Analysis

| **Risk** | **Probability of Risk** | **Potential Impact of Risk** | **Risk Mitigation Strategy**  **and Contingent Action(s)** |
| --- | --- | --- | --- |
|  | H/M/L \* | C/H/M/L \* |  |
| Not enough work done due to inability to sync schedules | L | M | Mitigation: have Members agree to a day to work on project every week  Contingency: have more then one meeting time for members who cant show up |
| Project performance not 100% due to members fasting | H | M | Mitigation: is to spend time together efficently, by pre planning what me be discussed and done.  Contingency: have members who are able to work at night work on the harder components of project while members with work, do the stuff that requires the least time |
| Project scheduling will become hard to deal with due all members having a class currently or starting soon | M | M | Mitigation: try to finish the hardest parts before the semester continues and classes increase in difficulty.  Contingency: keep track of members exams for other classes and see if it can be worked around.  Contingency: change schedule to do more work during down times of semester. |
| Team Leader going on vacation. | H | M | Mitigation: team leader will try to assign all roles before leaving.  Contingency: Team leader will assign thieir responsibilities to another team member. |
|  |  |  |  |

\* Critical /High / Medium / Low

## Reporting – Scope Change, Issue, Risk Management (RMMM) and Status

## Communication Plan (example)

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Information Type** | **Subject** | **Responsible Person** | **Frequency** | **Audience** |
| WhatsApp Messenger | Discuss questions about project assignments | All members | Daily | All Members |
| Core team meeting | Discuss issues  Discuss strategy  Discuss new functionalities | Team Leader | Weekly | Ali Al-mugoter  Hassan Harajly  Mohamed Fawaz |
| Email | Clarification on assigned work/project | All Members | As needed | Thomas steiner |

# Project Organization

## Roles and Responsibilities - Project Team Members & Support Personnel (example)

|  |  |  |
| --- | --- | --- |
| **Project Role** | **Name or skill set required** | **Department/Organization** |
| Project Manager | Project Management | Lecturer |
| System Analyst | Business/IT Application knowledge | Application IT team |

# Project Approval Signatures

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Project Team Role** | **Signature** | **Date** |
| Mohamad fawaz | Team member | Mohamad fawaz | 6/4/18 |
| Hassan harajly | Team member | Hassan harajly | 6/4/18 |
| Ali taraf | Project Manager | Ali taraf | 6/4/18 |
| Ali al-mugoter | Team member | Ali al-mugoter | 6/4/18 |

# Document Information

## Revision History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Author(s)** | **Revision Notes** |
| 1.0 | 05/22/2018 | Ali Al-Mugoter | Started working on pages 1 and 2 |
| 1.1 | 5/22/2018 | Hassan Harajly | Revised and added stuff to pages 1, 2 and 4 |
| 1.2 | 5/22/2018 | Ali Al-Mugoter | Worked on page 4 |
| 1.3 | 5/23/2018 | Hassan Harajly | Revised on page 4 |
| 1.4 | 5/23/2018 | Ali Tarraf | Added to page 4. Completed page 3. Worked on page 5. |
| 1.5 | 5/23/2018 | Ali Tarraf  Ali Al-mugoter | Revised entire document and made minor changes. |