CCC Program Project Plan

Purpose: This tool provides an example project plan to help communities plan the steps required to implement a community-based care coordination (CCC) program. The steps follow the general sequence of the tools in the CCC Toolkit.

Time needed: 2 hours

Suggested other tools: How to Use the CCC Toolkit; CCC Program Workflow and Tools; Glossary of Terms for CCC

How to Use

1. **Review** the following tools to obtain a general idea of the steps necessary to implement a CCC program: *How to Use the CCC Toolkit* , *Overview of CCC* (webinar), *CCC Program Workflow and Tools* , and *Glossary of Terms for CCC*

2. **Prepare** to develop a project plan for your community that reflects the overall timeline and milestones expected based on the community's goals for the program and the business model chosen. The example template provided on the **Plan** sheet in this Excel file extends the timeline over 26 weeks. A given community may want to plan over a different period of time or on daily, monthly, or quarterly increments.

3. **Identify and record** specific tasks and subtasks under each main category, resources to be used (names of individuals, committee/team, or vendor), and period of time planned for each task. The template has been designed to follow the general sequence of the tools in the CCC Toolkit. Review these and modify as desired. Enhance each general task with subtasks.

4. **Use the Excel spreadsheet** as a Gantt chart, if desired, to track actual completion of each task. Separate each task with a blank row and record the actual duration of time for each task.

> o *In the first example* provided in the template, Hospital A's CFO initiated project plan by studying tools in the **OVERVIEW** section of the CCC Toolkit.The timeline set for these tasks was two weeks as indicated by the black bar. Although each task completed only took one week each, three of the four tasks were completed on time as shown by the blue bar. The fourth task, *Review Resource Librar* y, was planned for the same period of time but was not completed. (The Resource Library may be used throughout the project and may actually not need a designated time period for accomplishment.)

> o *In the second example,* for the next main task area, **Use ASSESS Tools**, Hospital A's CFO kept the task list same as provided in the template, but made *Establish Steering Committee* the first task to be accomplished as indicated by the black bars. A subtask was added to the *Establish Steering Committee* and the steering committee was designated certain tasks to perform and their start dates. In this example, the CFO was delayed two weeks in establishing the steering committee, the establishment of which appears to have taken considerably longer than anticipated, delaying the C*omplete Community Data Collection Form* and *Conduct CCC Maturity Assessment* tasks. The CFO also tapped a physician leader to *Address Physician Engagement* . Dr. Goldstar appears to have started this quite soon after it was anticipated. Note that this example ends with Week 10, but the tasks started late may continue.

5. **Note** that there are also Gantt chart utilities that can be purchased to create an actual Gantt chart from an Excel file, or you may prefer to use standard project planning software.

CCC Program Project Plan (*Example*)

Ref #		Resources	Wk 1	Wk 2	Wk 3	Wk 4	Wk 5	Wk 6	Wk 7	Wk 8	Wk 9	Wk 10	Wk 11	Wk 12
	Use OVERVIEW tools to understand CCC													
	• Review 'How to Use This Toolkit' tool	Hospital A CFO	▓	▓										
			░											
	• View "Overview of CCC"	Hospital A CFO	▓	▓										
				░										
	• Review Glossary of Terms	Hospital A CFO	▓	▓										
			░											
	• Review Resource Library	Hospital A CFO	▓	▓	▓									
	• Review CCC Program Workflow and Tools	Hospital A CFO		▓										
					░									
	Use ASSESS tools to determine community readiness													
	• Conduct CCC Maturity Assessment	Steering Committee							▓	▓	▓	▓		
	• Complete Community Data Collection Form	Steering Committee					▓	▓	▓	▓	▓	▓		
	• Address Physician Engagement	Dr. Goldstar				▓	▓	▓	▓	▓	▓	▓		
						░	░	░	░	░	░	░	░	░
	• Establish Steering Committee	Hospital A CFO		▓	▓	▓								
						░	░	░	░	░	░	░	░	
	° Identify and create task groups as needed	Steering Committee				▓	▓	▓	▓	▓	▓	▓		
										░	░	░		
	° Adopt standard meeting agenda, minutes	Steering Committee				▓	▓							
							░							
	Use PLAN tools to establish steps in CCC program development													
	• Establish CCC Governance													
	• View "How to Set Up a CCC Program"													
	• Review CCC Program Workflow													
	• Establish CCC program goals													

• Construct business model for viable CCC program															
• Review Reimbursement Models for CCC															
• Define the CCC staffing model using the CCC Program Staffing Models															
• Review Matrix of CC-related Activities/Staff Roles															
• Construct CCC Program Project Plan (this tool)															
• Adopt an issues log using the Issues Log template															
• Implement a Communication Plan															
• Develop Change Management Plan															
Use DESIGN tools to structure various programmatic aspects of the CCC program															
• View "Building the Care Coordination Team"															
• Finalize a job description for the CCC Program's CC using the CC Sample Job Description															
• Complete the CCC Program Resource Checklist															
• Conduct Population Risk Stratification and Patient Cohort Identification															
• Conduct Assessment of Data Needs for CQMs															
• Review and establish care team roles															
• Conduct Workflow and Process [**Analysis]** for CCC															
• Review and plan Technology Tools for CCC															
• Review Approaches to Patient Communications															
• Introduce physicians to clinical guidelines using the Introduction to Clinical Guidelines tool															

Use IMPLEMENT tools to put essential components of the CCC program in place															
• *Create Provider Resource Directory and agreements*															
• *Create Community Resource Directory, agreements*															
• *Establish BAAs with business associates using Business Associate and Other Agreements tool*															
• *Establish Patient Authorization Form for release of information*															
• *Implement Patient Empanelment*															
• *Create information for patients (brochures)*															
• *Review and adopt Videos on CCC for Patients*															
• *Develop patient recruitment plan*															
• *Implement Referral Tracking and Follow up tools*															
• *Implement Patient CCC Variance Reporting*															
• *Conduct Pharmacist Outreach*															
• *Implement Documentation for Reimbursement*															
• *Create CCC Patient Plan and Patient Action Plan templates*															
• *Create a CC Task Plan and Weekly Schedule*															
• *Recruit patients into CCC program*															
• *Review, implement Supportive Communications*															
• *Review Promoting Patient Self-Management*															
• *Implement Patient Discharge CC Checklist*															

• *Implement Health Risk Assessments*																
• *Implement Health and Wellness Preventive Services*																
• *Using findings from the Workflow and Process Analysis, make adjustments [**Redesign**] for Workflow*																
Use MAINTAIN tools to evaluate CCC program effectiveness and make changes as needed																
• *Conduct Quality Scores Monitoring and Reporting*																
• *Conduct Satisfaction Surveys*																
• *Conduct CCC Program Evaluation*																
• *Modify program as needed*																
Use OPTIMIZE tools to put into place more advanced components of a CCC program																
• *Implement Open Access*																
• *Implement Patient Self-Management*																
• *Implement Patient Health Diary*																
• *sImplement Patient-Provider Agenda*																
• *Implement Personal Health Records in CCC*																
• *Implement Shared Decision Making*																
• *Implement Making Smart Referrals*																
• *Implement Remote Patient Monitoring*																
• *Conduct Workflow and Process [**Optimization]** for CCC*																
• *Implement workflow and process changes*																

For support using the toolkit

Stratis Health • Health Information Technology Services

952-854-3306 • info@stratishealth.org

www.stratishealth.org