



<<Project Name>>

<<Department(s)>>

Regina Qu'Appelle Health Region

Project Charter/Management Plan

Revision Number: <<#. #>>

Prepared by: <<Author>>

Date: <<Last Revision Date>>

TABLE OF CONTENTS

1	EXECUTIVE SUMMARY	5
2	OVERVIEW.....	6
2.1	PROJECT OVERVIEW	6
2.2	DOCUMENT OBJECTIVE.....	6
3	GOALS, OBJECTIVES, AND BUSINESS OUTCOMES	8
4	MILESTONES	9
5	SCOPE	10
5.1	JUSTIFICATION	10
5.2	BENEFITS.....	10
5.3	PRODUCT.....	10
5.4	COST.....	10
5.5	CRITICAL SUCCESS FACTORS.....	11
5.6	MEASURES OF SUCCESS	11
5.7	PROJECT DELIVERABLES.....	11
5.8	SCOPE MANAGEMENT.....	11
5.9	BOUNDARIES AND EXCLUSIONS	12
5.10	BUSINESS PROCESS CHANGE COMMITMENT	12
5.11	FUNCTIONALITY SCOPE	12
6	PROJECT RISKS, ASSUMPTIONS, CONSTRAINTS	13
6.1	RISKS.....	13
	ASSUMPTIONS.....	15
6.2	CONSTRAINTS	15
7	APPROACH.....	16
7.1	<<PHASE 1>>.....	16
7.2	<<PHASE 2>>.....	16
8	PROJECT ORGANIZATION.....	17
8.1	HIGH-LEVEL ORGANIZATIONAL STRUCTURE.....	17
8.2	PROJECT GOVERNANCE	18
8.3	RESOURCES	19
9	PROJECT ASSURANCES	20
9.1	DEPARTMENTAL RESPONSIBILITIES.....	20

9.2	PROJECT MEASUREMENTS	20
9.3	PROJECT AUDIT	21
10	ACCEPTANCE TESTING AND ACCEPTANCE CRITERIA.....	22
10.1	OBJECTIVES.....	22
10.2	PROCEDURE.....	22
10.3	ERROR MANAGEMENT	22
11	COMMUNICATION MANAGEMENT	24
11.1	TARGET AUDIENCE	24
11.2	COMMUNICATION TOOLS.....	24
11.3	COMMUNICATION CONTENT AND TIMING	25
12	CHANGE MANAGEMENT.....	26
12.1	CM OBJECTIVES.....	26
12.2	CM CRITERIA.....	26
12.3	CM ROLES AND RESPONSIBILITIES.....	27
12.4	CM PROCEDURE.....	28
12.5	CM PRIORITY	31
12.6	CM REQUEST FORM.....	31
13	QUALITY MANAGEMENT.....	33
14	PROJECT SCHEDULE.....	35
15	PROJECT AUTHORIZATION.....	36
	APPENDIX A - PROJECT ROLE/RESOURCE ASSIGNMENTS	37
	APPENDIX B – ESTIMATED WORK BREAKDOWN STRUCTURE.....	38
	APPENDIX C – CHANGE REQUEST (CR) FORM.....	39

Document Control

Revision History

Revision Number	Date of Issue	Author(s)	Brief Description of Change

Distribution

This document has been distributed to:

Name	Department/Area

Terms of Reference:

<<Example...>>

Please note that for the duration of this document the definition of the Medical Imaging Department will include all areas within the sites of the Regina Qu'Appelle Health Region: General Radiology, Angiography, MRI, CT, Mammography, Nuclear Medicine, Gastric, and Ultrasound. A change in Region boundaries would change the number of diagnostic areas included. Other areas identified in the charter are considered external to the Medical Imaging Department.

1 Executive Summary

As follows, an executive summary of the highlights of the <<Project Name>> Project Charter/Management Plan:

-
-
-

2 Overview

2.1 Project Overview

<<Provide brief overview of project>>

2.2 Document Objective

<<Provide objective of document>>

<<Example... >>

The intent of this document is to consolidate (as much as possible) all Project Charter and Project Management Plan components relating to the implementation of <<Project Name>> into one package.

There are times when the use and differentiation between Project Charters and Management Plans become synonymous based on their timing. In general, Project Charters recognize the existence of Projects and seek to gain approval to begin planning processes required to accomplish identified goals. Charters are also used to obtain formal approval on general parameters and structure of Project.

A Project Management Plan generally serves as a controlling document used to guide both Project execution and control. The primary use of Project Plan is to document planning assumptions and decisions, facilitate communication among stakeholders, define and approve scope of project (inclusions/exclusions), cost, and schedule baselines.

This document contains elements commonly found in both Project Charters and Management Plans, resulting in a clear and concise understanding of the Project.

The main areas covered include:

- Executive summary/overview of Project
- Goals, objectives, business outcomes of Project
- Scope of Project
- Benefits, deliverables, estimated cost of Project
- Project Assurances
- Schedule, milestones of Project
- Assumptions and Constraints of Project
- Team Management
- Organization, governance structure of Project
- Approach
- Communication Management Strategy
- Change Management Strategy
- Quality management Strategy
- Risk Management Strategy

- Acceptance Testing & Acceptance Criteria

3 Goals, Objectives, and Business outcomes

This section presents a clearly defined statement communicating the goals, objectives, and business outcomes of the <<Project Name>> Project. Goals are defined as general intentions that are broad in nature and un-quantifiable. Objectives are precise actions to be taken to realize the stated goals and can be validated and/or measured. Outcomes represent deliverables (physical/subjective) resulting from the Objectives

No.	Goals	Objectives	Business Outcomes
1.			
2.			
3.			

4 Milestones

The Project milestones detailed below represent the completion of project work packages and/or specific phases.

** Note: Expected Dates for completion of Milestones will not be available until the Project Schedule is defined. This section will be updated accordingly once dates are available.*

Project Life-Cycle Stage	Milestone Description
Initiation	<<Milestone Description in Phase>>
Initiation	
Initiation	
Planning	
Planning	
Planning	
Execution	
Execution	
Execution	
Closure	
Closure	
Closure	

5 Scope

5.1 Justification

<<Justification of Project...>>

5.2 Benefits

<<Benefits of Project...>>

5.2.1 <<Benefit Type>>

Benefits

5.2.2 <<Benefit Type>>

Benefits

5.3 Product

<<Description of Product/System acquired (if appropriate)...>>

5.4 Cost

<<Project costs incurred... >>

<<Example...>>

Project costs include (but are not limited to):

- Computer hardware
- Operation and application software
- Network costs – including redundancy requirements
- Communications, hardware, cabling and software
- Training/Travel
- Consulting
- Support – required during implementation and as outlined post implementation

- On-going product maintenance and support
- Project supplies
- Incremental staffing requirements during implementation ensuring successful business process changes and ongoing management of system services

5.5 Critical Success Factors

<<Identify what has to happen in order for Project to be deemed a success... >>

The <<Project Name>> Project will be deemed a success if each of the following factors identified below are met:

-
-
-
-

5.6 Measures Of Success

<<Identify what will be used to identify Project success...>>

-
-
-

5.7 Project Deliverables

<<Identify what will be delivered by Project...>>

The Deliverables from the Project will focus on providing the following:

-
-
-

5.8 Scope Management

<<Define how scope of Project will be managed...>>

<<Example>>

Changes in Project scope will require justification in terms of need, time and financial resources. Documented approval will be required from the Steering Committee and Project Sponsorship. Any changes must follow the Change Management process defined in Section 12.

5.9 Boundaries and Exclusions

The implementation of <<Project Name>> will include/exclude the following:

<<Identify what is in/out of Scope of Project...>>

5.9.1 In Scope

-
-
-

5.9.2 Out of Scope

-
-
-

5.10 Business Process Change Commitment

It is recognized that changes to current business process may be required to facilitate the implementation of the Region's <<Project Name or solution>>. Agreement to changes in process may be made to facilitate process implementation and access optimal benefits from the product purchased. Validation and commitment to change may be required at both Regional and Department levels as changes to process may impact multiple areas.

5.11 Functionality Scope

<<Identify functionality included within Project...>>

The implementation of <<Project Name>> will include the following service functionalities:

-
-
-

6 Project Risks, Assumptions, Constraints

6.1 Risks

<<Identify all potential Risks that may affect Project...>>

As part of the development of this Charter/Management Plan, an assessment has been made of the major risks which could affect successful and timely completion of the Project. The Project Manager will be responsible for maintaining a log of these risks as the Project progresses, for identifying and implementing appropriate risk management strategies and for communicating the status of major Project risks to the Project Director, Project Sponsor(s), and Steering Committee.

The following risks have been identified as relevant to this project along with their mitigation strategy.

No.	Risk Description	Probability (H/M/L)	Impact (H/M/L)	Planned Mitigation	Responsibility
Financial Risks					
High-Level Commitment/Support Risks					
Resource Risks					

Communication Risks					
Change Management Risks					
Infrastructure Risks					
Integration / Interface Risks					
Testing Risks					

Assumptions

<<Identify all assumptions pertaining to Project (must still be validated for certainty)...>>

The following assumptions have been made in regards to this Project:

No.	Assumption Description

6.2 Constraints

<<Identify all constraints limiting Project...>>

No.	Constraints

7 Approach

<<Identify approach to be used in delivery and execution of Project...>>

<<Example...>>

This section outlines, at a high-level, the approach that will be taken in the successful delivery of <<Project Name>> initiative.

The goal is to...

The Project Team will consist of...

The structure of the Project Team is described further in Section 8.

The delivery of the Project will be aligned with...

The 999 phases of the implementation are...

7.1 <<Phase 1>>

7.2 <<Phase 2>>

8 Project Organization

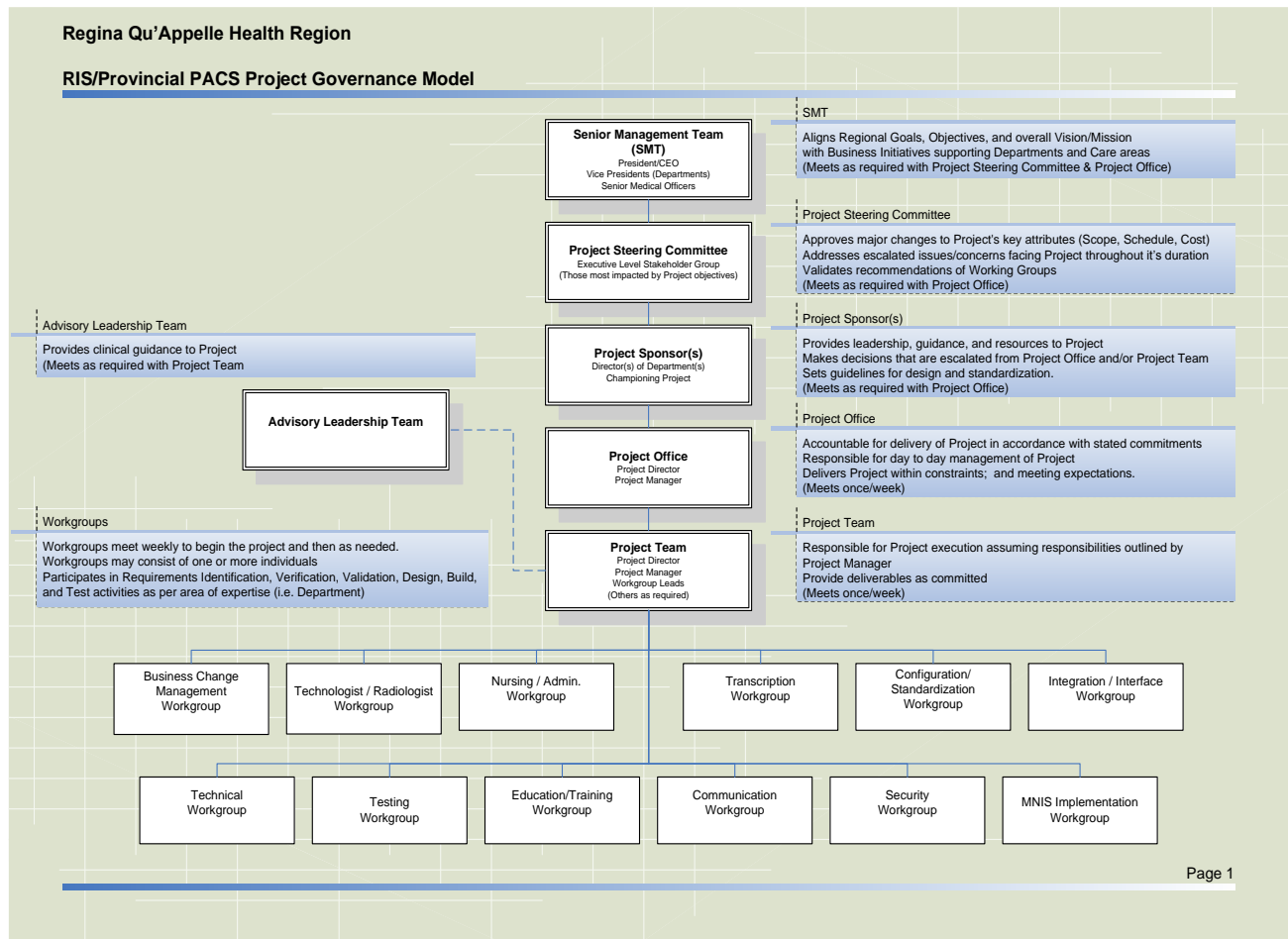
8.1 High-Level Organizational Structure

The <<Project Name>> implementation is based on a project organizational structure that:

- Is comprised of interdisciplinary teams focused on clinical and operational performance improvements
- Involves all levels of the organization in key decisions
- Facilitates communication and promotes buy-in for new information technology infrastructure
- Focuses on key organizational objectives related to patient safety, productivity, and staff adoption of the new technology

The organizational structure in place for <<Project Name>> Project is depicted below.

<<Example diagram...>>



8.2 Project Governance

The <<Project Name>> Project Governance model describes how concerns and difficult issues will be managed and controlled throughout the project resulting in better decision making and accountability for results.

Decisions can be made at various levels of the governing structure based on their risk and impact to the Project's goals, objectives, strategy, vision, cost, schedule, scope, activities/tasks, and resourcing.

Throughout the life cycle of the project, most decisions will be made at the Project Team level (as they generally don't affect schedule, cost, or scope). As decisions become more complex and affect the overall nature, operability and delivery of the Project, the Project Manager will become involved where issues/concerns will be discussed with team members and with Department Representatives.

Decisions affecting change in baselined scope, schedule, budget, or those where mutual agreement cannot be found must be forwarded to the Project Director for review. The Project Director will work with all parties in the resolution of disputes and/or changes that are in the best interest of the Project.

Decisions impacting Project goals and/or objectives must be forwarded to Project Sponsor(s). Sponsors may in turn ask for further information, but it will be their responsibility to evaluate the details provided and give guidance and approval.

Any decisions affecting overall project strategy (and those decisions that can't be resolved elsewhere) are presented to the project's Steering Committee.

The highest decision making body in the governing structure is Senior Executive. Decisions commonly reaching this level pertain to Project purpose/vision that could potentially put the Project in jeopardy.

<<Example diagram...>



8.3 Resources

Stakeholders will be identified to fill the following Project roles (See Appendix A – Project Role/Resource Assignments)

Project Role	Responsibilities

9 Project Assurances

<<Identify responsibilities of departments/areas involved...>>

9.1 Departmental Responsibilities

9.1.1 <<Dept.>> Responsibilities:

-
-
-

9.1.2 <<Dept.>> Responsibilities:

-
-
-

9.2 Project Measurements

9.2.1 Implementation

Implementation processes will be developed and outcomes will be measured to validate the Project success and to ensure that the Project will satisfy the needs for which it was undertaken.

Measurement criteria include:

- Were Project timelines met
- Was Project completed on-time and within budgetary constraints
- Did the quality of the Project product meet or exceed customer expectations
- Were all stakeholders involved and committed to Project
- Were the goals of the Project clearly stated and understood by stakeholder and were they met
- Were effective tools utilized to manage day to day activities of Project as well as Project communication
- Were effective protocols in place for requesting, evaluating and approving change
- Were identified risks mitigated and was the occurrence of unidentified risks minimized
- Creation of Project Charter/Management Plan detailing activities, responsibilities and time frames for completion
- Was there adherence to roles and responsibilities as identified in the Project Charter/Management Plan
- A post implementation project audit will be completed to examine the management of Project and lessons learned

9.2.2 Outcome

<<Mechanisms to quantify and measure project success...>>

These include methods to measure:

-
-
-

9.3 Project audit

<<Identify Project monitoring activities used throughout Project...>>

<<Example...>>

Throughout the life of the Project ongoing monitoring of the Project's status will be in place such as:

- Regular Project Team meetings to discuss and document current issues and monitor timelines to ensure they are realistic and still aligned with the business goals
- Monthly status reports will be submitted to the Steering Committee to review
- Meetings of the Steering Committee will be called when necessary to review issues
- Regular updates to the Project Schedule (and supporting milestones) will be distributed to identify actual start and end dates of tasks in relation to planned dates
- A post implementation project audit will be completed to examine the management of Project and lessons learned

10 Acceptance Testing and Acceptance Criteria

The intent of User Acceptance Testing is to ensure that key functionalities of <<Project Name>> systems operate as expected. UAT will be the final step before RQHR deploys the applications to the Region's Production Environment.

10.1 Objectives

The objectives for User Acceptance Testing are as follow:

- Design, build, and execute a “reasonable” amount of test cases that span <<Project Name>> to ensure that key functionality of system(s) perform as expected prior to the implementation and deployment of the product
- Reduce the probability of errors being introduced to RQHR's Production Environment
- Resolve and/or log any issues surrounding <<Project Name>> system Test/Train Environment
- Ensure that <<Project Name>> conforms to Regional and departmental requirements
- Ensure that each integrated enterprise application interfaces properly and communicate as expected (no gaps in the data flow)
- Provide information regarding areas of concern to Training coordinators. Coordinators can then update their training packages accordingly
- Ensure implementation and deployment efforts occur in a seamless manner

10.2 Procedure

User Acceptance Test procedures are the sole responsibility of <<Department(s)>>. Both <<Vendor Name>> and RQHR's Information Technology will however facilitate/guide the phase and provide support and guidance throughout.

10.3 Error Management

During testing, errors will be recorded as they are detected by Project Team. It will be the responsibility of Project Team to review, prioritise, and log the items at the appropriate level as they occur. Information Technology will provide guidance and assistance in the identification and documentation of deficiencies.

The Project Manager must also be updated on a regular basis of testing status.

Error analysis will be carried out between Department Representatives, Project Management and appropriate tester and/or Project Team member(s).

Errors, which are agreed as valid, will be categorized as follows by the tester and/or Department Representative:

- **Category 1 (Fatal)** - Serious errors that prevent testing of a particular function from continuing or serious data type error. Testers can't access a function and need the bug to be fixed immediately. The

defect prevents testers from testing the feature area, sub-area or functionality of the feature. Will prevent implementation if not resolved.

- **Category 2 (Serious)** - Serious or missing data related errors that may prevent implementation. Errors testers would experience such as: data corruption, incorrect data presentation, system crashes on common user scenarios and major interface defects.
- **Category 3 (Minor)** - Minor errors that do not prevent or hinder functionality. Workaround exists if necessary.

Each error will be reviewed individually as to its impact towards testing and future implementation. All errors will be addressed, either during the Acceptance Testing phase or afterwards depending upon severity.

11 Communication Management

The purpose of this section is to describe all communication activities taking place during the implementation and deployment of <<Project Name or system>>.

11.1 Target Audience

To ensure proper communication is delivered to the proper sources in an efficient and timely manner, the target audiences for the Project must be defined. The primary recipients of communication throughout the project include:

-
-
-

11.2 Communication Tools

All communications must be developed and delivered in a format that is efficient, understandable, and easily accessible. Ensuring communication is delivered and received through appropriate channels, the following communication tools, media, and support will be used throughout the Project.

- Word of Mouth
- Structured Meetings
- Collaborative Workshops
- Management Forums
- Conference Calls
- E-Mail
- Web-Site
- Written/Electronic Documentation and Reports
- Public Affairs

11.3 Communication Content and Timing

<<Identify types and frequency of communications>>

The table below illustrates the types of communications that will be taking place throughout the Project.

Each communication describes:

- The name or type of communication
- The description and purpose of the communication
- The person/role responsible for that communication
- The attendees/audience for that communication
- The communication media (e.g., meeting, conference call, e-mail) for that communication
- The timing/frequency that this communication item is delivered

Type	Description / Purpose	Responsible	Attendee / Audience	Media	Timing
Meetings					
Reports					
External Communications					

12 Change Management

<<Example...>>

The purpose of this section is to describe how changes to the <<Project Name>> Project (i.e. changes to scope, deliverables, timescales or resources) are formally defined, evaluated, approved and controlled prior to implementation and deployment.

The Change Management (CM) process manages Change Requests (CR's) to ensure that the scope of the Project is controlled. The Change Management Process will be enforced after the scope of the project and its schedule has been defined and baselined. At that point, any deviations from the base-line Project Charter/Management Plan and/or Schedule are processed in a pre-determined manner. The procedure manages the documentation of the proposed change, its benefits and impacts, and triggers the acceptance, rejection or deferral of the change at the appropriate authority level. By adhering to the change processes, a more orderly implementation and deployment of the project (with changes) can take place.

12.1 CM Objectives

The primary objectives of the Change Management process are as follows:

- Manage each request for change to ensure that the scope of the Project is controlled
- Ensure each request for change is assessed by the Project Sponsor(s), stakeholders, and other key Project personnel
- Allow the impact of all changes (impact on scope, time/schedule, financial cost) to be understood and managed at the individual project and authority level
- Allow each change to be accepted/rejected/deferred with the appropriate authority
- Enable the orderly implementation of each accepted change
- Allow minimum impact changes to be managed with minimal overhead

12.2 CM Criteria

The criteria for successful Change Management include:

- One source of information (documentation and forms) detailing the status of each change, including history and potential impacts (if any) regarding Project scope, time, and financial costs
- Single change request process used that includes, as a minimum, a description of and reasons for change, success criteria, prerequisite changes, appropriate management authorization, requested implementation date
- Required Project Sponsor and/or Steering Committee approval prior to implementation of change(s)
- Integrity of change items. Project Manager will ensure all changes have the appropriate sign-offs prior to implementation, preventing any promotion of changes having not been approved

12.3 CM Roles and Responsibilities

The following table defines the key roles and their responsibilities in the Change Management process. It is important to note that several roles may be performed by one individual and alternatively several people could fulfil one role.

Role	Responsibilities
Project Steering Committee/Project Sponsor(s)	Review of all Major and Minor CR's Authorization/Rejection/Deferral of major CR's and/or those that have been escalated.
Departments... <ul style="list-style-type: none"> • • • 	Guidance and direction towards the enhancement of the <<Project Name>> solution Definition of priorities relating to all requests for change to the system or related process Definition of proposed changes that may be implemented in the current/future system releases Advise Project Team on business risks pertaining to proposed changes (if any) Authorization/Rejection/Deferral of CR's in their level of authority
Project Director	Review of all Major and Minor CR's Authorization/Rejection/Deferral of CR's in level of authority
Project Manager	Responsible for all change management control and execution Acceptance of all Major and Minor CR's Review and communication of request to Project Director Coordination of change request movement between the various stages of the Change Management process Controlling and maintaining change management documentation and forms Managing change approval process and convening Change Management meetings as necessary Advising stakeholders on the status of requested changes Verifying closure of changes

Role	Responsibilities
RQHR Project Team	Responsible for the technical and business assessment of the requested change(s) to the <<System>> system Assist in the evaluation of initial request for change from department(s) and providing approval to proceed Categorization of change (Major/Minor) Identification of the service/technical need for the change and its related success criteria Proposal of change solution in technical terms Seeking approval for change to proceed
Vendor (<<Vendor Name>>)	Responsible for the management of the promotion of the change to the RQHR pre-Production (Test/Train) and / or Production Environments Planning technical execution of change Verification of build and test of change Supervising the back-out plan change if necessary
RQHR Project Team & Vendor	Performs installation of change(s) into the pre Production/ Production Environment

12.4 CM Procedure

CR's may be initiated by any stakeholder including Project Sponsor(s), Steering Committee members, Project Team members, and/or Department representatives. CR's must be registered through the Project Manager. Requests are then issued and logged in the Change Management Log for tracking and management purposes. CR's are first reviewed by Project Team members and those worthy for inclusion are forwarded to the Project's Steering Committee for approval.

Steering Committee approval is required before any further work is undertaken on the CR's. For those CR's that are rejected the submitting party requesting the change will be notified through the Project Manager.

The Change Management Process described below must be followed in all cases, and should not be deviated from when planning or implementing changes. For those instances where emergency measures are required and proposed changes must be deployed in order to restore and sustain normal system operation, the Project Sponsor(s) (or their delegated authority) may provide authorization to the Project Manager to implement the required changes without administrative approvals. Administrative issues may be deferred until resulting situation is resolved.

The four steps within the <<Project Name>> Change Management process are:

1. **Change Initiation:** - Initiating and logging change request(s)
2. **Change Assessment:** - Assessing business and technical issues surrounding change request(s)
3. **Change Authorization:** - Authorization/rejection of change request(s)

4. **Change Implementation:** - Planning, scheduling and implementation of change request(s)

12.4.1 Change Initiation

Changes to the <<Project Name>> Project can be triggered through the identification of a need to improve the current system and/or its environment. Changes are often identified by Project Team members and Stakeholders as Project progresses. It is recommended that requests for change be reviewed at the Workgroup level before being submitted by Workgroup lead/co-lead.

Changes are often introduced in order to update related Project deliverables, milestone dates, efforts and/or project management information. Regardless of the type of change, once a requirement for change is identified, a CR must be registered through the Project Manager.

The Project Manager will:

- Assign the next available control number
- Register the CR in the Change Management Log
- Forward the CR to Project Team member(s) for analysis and assessment
- Provide necessary communications regarding CR
- Inform Project Director of request

12.4.2 Change Assessment

Once changes have been logged and passed onto the Project Team for analysis, the change evaluation, assignment and assessment activities occur. Team members will perform an initial evaluation of the request to confirm its relevance to Project. The change is evaluated from an end-user and business impact viewpoint as well as determining the technical feasibility, risk and effect/impact within the overall Production Environment.

Team members will:

- Determine whether CR is within scope of Project
- Conduct business assessment in collaboration with applicable departments and/or <<Vendor Name>> Technical Representatives
- Conduct technical assessment (internal/external)
- Consult with <<Vendor Name>> in regards to both proposed solution and estimated cost pertaining to implementation
- Forward completed CR to Steering Committee for authorization and approval to proceed
- Provide necessary communications regarding approval of the CR assessment

12.4.3 Change Authorization

Change authorization is required to evaluate the CR in terms of cost, benefit and risk/impact to the operation of the <<System>> system, and to authorize the change to be developed. Approval by the Steering Committee and Project Sponsor(s) (if necessary) is mandatory for the change to progress.

The Project Manager is also involved in the authorization phase and is responsible for the management of all change activities. The outcome of this phase will result in a signed change request from the Steering Committee/Project Sponsor(s) that the change can be progressed, or that the change is rejected.

If the change request is approved, the final Change Implementation step can proceed.

The Steering Committee/Project Sponsor(s) will:

- Ensure a competent evaluation of the change has been completed
- Specifying criteria or conditions under which progress of the change might be reviewed or halted
- Record approval/rejection of change via signature on the CR or via electronic documentation (e-mail)

The Project Manager will:

- Ensure authorization for the change to be either developed and/or implemented has been obtained from the appropriate executive
- Managing any issues with the change
- Managing rejected changes
- Provide necessary communications regarding the outcome of the authorization (including rejection of change) to the affected parties

12.4.4 Change Implementation

Both RQHR Project Team and <<Vendor Name>> Implementation Team members will be responsible for the design, development and subsequent testing of each requested change as per area/focus. The objective is to perform and monitor all relevant actions to ensure implementation of the proposed change is free of defect.

Once the change has been fully unit tested by <<Vendor Name>>, it will be deployed to the RQHR Test/Train Environment for User Acceptance Testing (UAT). Once fully tested, the resulting change item will be built into an implementation/deployment schedule. Once the change item has been fully implemented, the CR will be closed within the Change Management Log by the Project Manager.

One of the more critical elements of the Change Management process is keeping all affected parties advised of the status of the change. The Project Manager will be responsible for notifications. In particular, at change implementation, the Project Manager will ensure all parties are aware of the status of the CR through implementation and deployment.

The Project Manager will:

- Review and update change management Log details
- Schedule change to meet expectations of the requestor and minimize impact on participants and end-users
- Communicate change details and status to all involved parties

The RQHR Project Team and/or <<Vendor Name>> Implementation Team will:

- Initiate the change plan
- Manage the installation of the Change
- Provide communication to Project Manager of any issues
- Arrange for Final Acceptance with Department/area requesting change
- Advise Project Manager of the outcome of the change

12.5 CM Priority

All proposed changes introduced by stakeholders must be submitted to RQHR Project Team with an indication of their urgency. This urgency forms a changes' priority. The Change Management process will have five levels of priorities. They are:

- **Emergency** - Anything that requires a change to be made immediately, bypassing the change control process temporarily
- **Critical** - An acute error in the <<System Name>> system or integrations causing shutdown, failure or unsatisfactory operation
- **High** - A serious error in the <<System Name>> system or integrations that interferes with the operation of the system but does not actually prevent its use or operation
- **Medium** - An error in the <<System Name>> system or integrations where alternative solutions are available that are acceptable temporarily
- **Low** - Imperfections in the use of <<System Name>> or integrations that have no significant effect on the use or operation of the system

12.6 CM Request Form

The mechanism used to identify and present proposed change requests will be the Change Request form.

The form, a template of which can be found in Appendix C - Change Request (CR) Form, summarizes the change. It focuses on “what the change is”, “why it’s needed” and what the overall “impact on the <<System Name>> system and/or environment” will be.

Change Request forms can be received manually or through e-mail. Once received, forms will be printed and saved within an appropriate archive for future reference.

The <<Project Name>> Change Request form is divided into 5 sections.

- **Change Request Initiation Section**
 - Requestor Information - Basic information regarding the request, for example, name of requester and date requested
 - Change Details - Detailed information of the request, for example, name, application/system area, type of change, and justification
- **Change Request Identification & Evaluation Section**
 - Change Identification – Control number of Change Request including who and when it was received

- Change Analysis/Estimate - Detailed information of recommended action to be taken and estimated time/cost

➤ **Change Request Approval Section**

- Change Authorization – Detailed information pertaining to approval, rejection, and/or deferral of request. Names and dates received of various approvers of the request. Providing a paper copy with actual signatures is the responsibility of the Project Manager.
- Change Status - Includes information about the status of the request

Status	Description
Submitted	New change request submitted to change control system
Evaluated	Impact analysis and review of request completed
Approved	Decision to implement the request and include it within current/future build or product release
Cancelled	Decision to cancel change request
Denied	Decision not to implement requested change
Deferred	Decision to defer change to a later period
Change Made	Completion of requested change, including unit testing
Verified	Confirmation that the modification(s) in affected work products were made correctly
Closed	Change has been verified through User Acceptance Testing Modified work products have been installed, and request is complete

➤ **Change Request Implementation & Quality Assurance Section**

- Change Implementation - Information about how and when the request was implemented
- Change Quality Assurance - Information about how and when the request was verified and validated

13 Quality Management

The purpose of this section is to describe how Quality Assurance processes will be built into the <<Project Name>> Implementation Project to ensure project outputs are delivered fit for use/purpose and that planned project outcomes are realised by all RQHR stakeholders.

The Quality Management processes described below increase project certainty and reduce the overall risk of project failure. Although the Project is not a typical application development project where systems analysis, design and development phases exist where key quality measures are introduced, the <<Project Name>> Project will have formal process (re)definition, build/configuration, inbound/outbound integration, user acceptance testing and implementation and deployment phases. Quality assurance will be focused around those phases.

The goal of the Project with regards to quality is to have 100% of the functionality required by RQHR's Medical Imaging delivered with little or no defects, while fitting into RQHR's CIS plan and vision for EHR.

Some of the quality measures will be subjective and must be defined by the Steering Committee, Project Sponsorship, Project Director, <<Department Name>> representatives. Examples of these include expectations regarding system performance and response time, reliability and information integrity requirements, system completeness, system flexibility and ease of use. Once these expectations are provided, the Project Team will work towards their fulfillment.

The quality measures that will be built into the <<Project Name>> Project from inception include:

- Walkthroughs of critical documents with Project Sponsor(s), Steering Committee, Department Representatives and RQHR Project Implementation Team members
- Status meetings (as necessary) with Project Sponsor(s), Steering Committee and Department Representatives to provide updates on Project progress
- Regular Project status reports to Project Sponsor(s) and Steering Committee
- Regularly scheduled status meetings with Project Team (including members of the <<Vendor Name>> Implementation Team)
- Communications to all internal/external stakeholders regarding the Project's progress/status
- Continuous monitoring and tracking of Project Charter/Management Plan and Schedule through MS project
 - Capturing actual durations of all project tasks
 - Capturing actual time spent on each project task
 - Forecasting time remaining on open project tasks
- Continuous monitoring and tracking of User Acceptance Testing
- Defect tracking and error management (Section 10)
- Implementation and documentation of formal Change Management process to be followed during the course of the Project
- Monitoring or milestone criteria

- Verifying/Validating Test/Train Environment (by <<Vendor Name>>) prior to delivery of <<System Name>> to Project Team and RQHR
- Performing concise User Acceptance Testing before <<System Name>> is implemented into RQHR's Production Environment

14 Project Schedule

<<If Project Schedule complete, include. Otherwise provide tentative one if available.>>

<< Example...>>

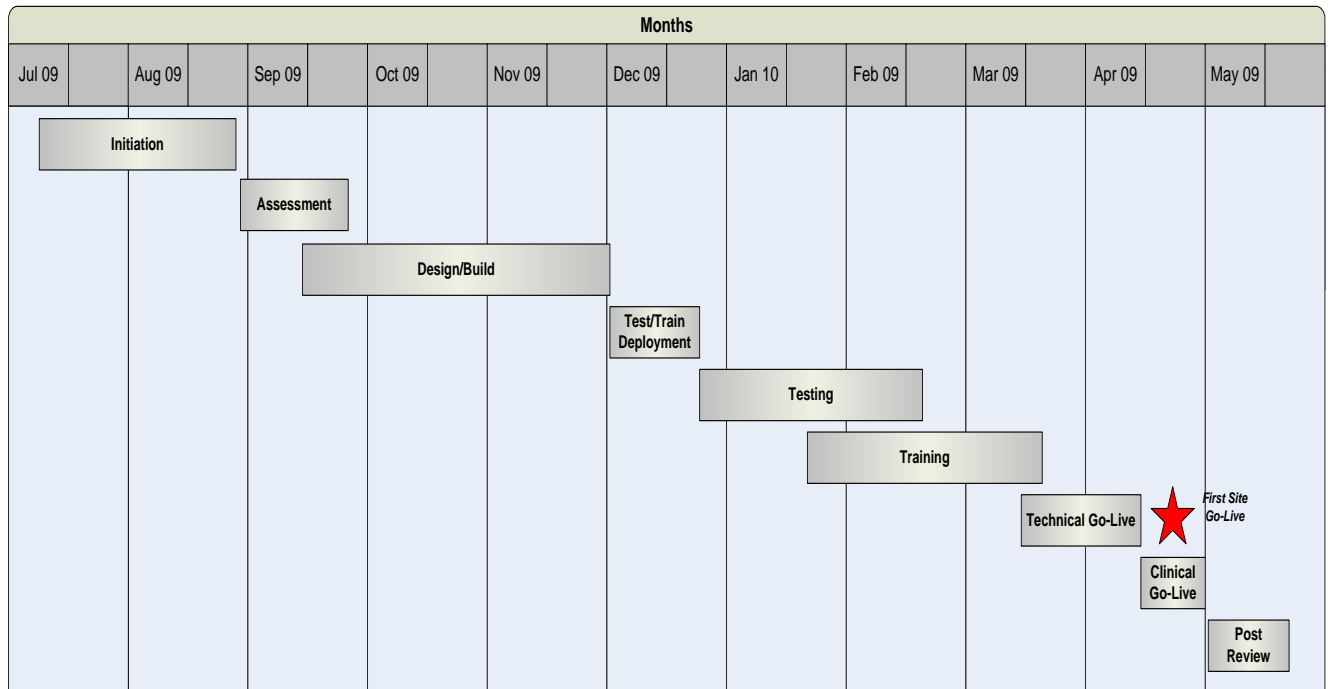
The Project Schedule is still being developed at this time and therefore has not been included. Once a draft version of it is complete, it will be circulated amongst the team for review and input. The final, “baseline” schedule will be included with targeted Milestone dates once complete.

A tentative timeline is presented below and is based on high-level preliminary estimates and will be revised once schedule is complete.

Project start date: July 8, 2009

Tentative end date: May 20, 2010

Approx. 11 month duration



15 Project Authorization

<<Identify those authorising project...>>

The signatures below indicate agreement with the content presented within this Project Charter/Management Plan.

_____ Date: __/__/__
<<Name>>, <<Title>>
<<Department>>
<<Area>>

_____ Date: __/__/__
<<Name>>, <<Title>>
<<Department>>
<<Area>>

_____ Date: __/__/__
<<Name>>, <<Title>>
<<Department>>
<<Area>>

Appendix A - Project Role/Resource Assignments

(Stakeholder roles identified in body of document)

Project Sponsor:



Key Stakeholders:

Internal:

-
-
-

External:

-
-

Project Steering Committee:

-
-
-

RQHR Project Team:

-
-
-

<<Vendor(s)>> Project Team:

-
-
-

Appendix B – Estimated Work Breakdown Structure

This section will be completed once team members have been assigned and appropriate activities have been reviewed with approx. efforts.

Appendix C – Change Request (CR) Form

 Regina Qu'Appelle HEALTH REGION	Change Request (CR) Form
---	---------------------------------

Requestor Information

Requestor Name: _____ Department: _____
Phone Number: _____ E-mail: _____
Date of Request: _____ Date Required: _____
(mm/dd/yyyy) (mm/dd/yyyy)
Supervisor's Signature: _____

Change Details

Change Request Name: _____

System/Application Name: _____ Version Number: _____

Type of Change Requested (check one): New Hardware/Software Requirement
 Hardware/Software Requirement Change
 Software/Application Fix/Repair
 Software/Application Configuration Change
 Data Modification
 Other... _____

Change Priority Level (check one): Emergency Critical High Medium Low

Description of Proposed Change: *(Detail functional and/or technical information. Use attachment if necessary.)*

Supporting Information/Print-Outs (check one): Yes No

List: _____

Change Reason (check one): Defect Business Performance Other

Benefit/Justification for Change:

Template Project Charter Management Plan RQHR

Regina Qu'Appelle Health Region – Information Technology

27/08/2009 7:27AM

Impacted Systems, Applications, Areas: _____

Business Risks: _____

Impact if Not Approved: _____

Focus of Request Re-creatable (check one): Yes No
Steps to Re-create issue: _____

Workaround Available (check one) : Yes No
Description of workaround: _____

Change Identification

Change Request Number: _____
Received by: _____ Date Received: _____
(mm/dd/yyyy)

Change Analysis/Estimate

Assigned To: _____ Assignment Date: _____
(mm/dd/yyyy)

Phone Number: _____ E-mail: _____

Recommended Action: _____

Estimated Effort: _____ Estimated Cost: _____

projected Start Date: _____ projected End Date: _____
(mm/dd/yyyy) (mm/dd/yyyy)

Change Authorization

Change Request Approval: Approved Denied Deferred Pending

Role	Name	Signature	Date (mm/dd/yyyy)
Project Manager			
Steering Committee			
Project Sponsor			
Other...			

Change Status

Status (check one): Approved Cancelled Deferred
 Evaluated Closed Change Made
 Rejected Submitted Verified

Change Implementation

Work Estimate

Actual Start Date: _____
 (mm/dd/yyyy)

Actual End Date: _____
 (mm/dd/yyyy)

Resolution/Remarks:

Change Quality Assurance

Deployment to Pre-Production Environment

Changes applied to Pre-Production Environment (check one): Yes No

<u>Role</u>	<u>Name</u>	<u>Signature</u>	<u>Date (mm/dd/yyyy)</u>

UAT Testing

User Acceptance Testing Status (check one): Pass Fail

<u>Role</u>	<u>Name</u>	<u>Signature</u>	<u>Date (mm/dd/yyyy)</u>

Production Implementation

Changes applied to Production Environment (check one): Yes No

<u>Role</u>	<u>Name</u>	<u>Signature</u>	<u>Date (mm/dd/yyyy)</u>