Key Milestones Tracker | **Date Last Updated** | 21-Aug-12

Please document all key project milestones that need to be completed to successfully deliver the project, and the

Work stream Name		Booking and Scheduling Project
Project Name (if applicable)		
Executive Sponsor		Steve Peak
Project Lead		Janine Harrison & Sara Biffin
Project Manager		Tom Jones & David Heath

Key: Replace the 'O' with an 'OM' or 'OC' and replace the 'R' with an 'RM' or 'RC' to show status when key milestone falls due.

O	**O**riginal key milestone due date, not yet due. Progress against original key dates will be monitored
OC	**O**riginal key milestone due date, **C**ompleted on time.
OM	**O**riginal key milestone due date, target date for completion **M**issed (You must show revised estimate of completion date, using an "R"]
R	**R**evised expected key milestone due date, updated following change of plan or missed earlier key milestone
RC	**R**evised key milestone due date, **C**ompleted on time.
RM	**R**evised key milestone due date, revised target date for completion **M**issed (You must show revised estimate of completion date, using an "R"]

Project Summary timeline

Milestone Category	Milestone	Key Task Owner	Key Task Description (to be completed in week commencing, as specified)	Mar-12				Apr-12				May-12				Jun-12				Jul-12				Aug-12				Sep-12				Oct-12				Nov-12				Dec-12				Jan-13				Feb-13				Mar-13			
				05-Mar-12	12-Mar-12	19-Mar-12	26-Mar-12	02-Apr-12	09-Apr-12	16-Apr-12	23-Apr-12	30-Apr-12	07-May-12	14-May-12	21-May-12	28-May-12	04-Jun-12	11-Jun-12	18-Jun-12	25-Jun-12	02-Jul-12	09-Jul-12	16-Jul-12	23-Jul-12	30-Jul-12	06-Aug-12	13-Aug-12	20-Aug-12	27-Aug-12	03-Sep-12	10-Sep-12	17-Sep-12	24-Sep-12	01-Oct-12	08-Oct-12	15-Oct-12	22-Oct-12	29-Oct-12	05-Nov-12	12-Nov-12	19-Nov-12	26-Nov-12	03-Dec-12	10-Dec-12	17-Dec-12	24-Dec-12	31-Dec-12	07-Jan-13	14-Jan-13	21-Jan-13	28-Jan-13	04-Feb-13	11-Feb-13	18-Feb-13	25-Feb-13	04-Mar-13	11-Mar-13	18-Mar-13	25-Mar-13
Enter milestone category from the drop down box	Enter description of each milestone	Enter name of person(s) responsible for key task delivery (Ensure they know) Project Manager to brief all task owners and ensure tracking is updated and monitored.	*EXAMPLE: Set up an initial scoping meeting with key stakeholders*																																																					
		Tom Jones & David Heath	Workflow Implemented																																																				
Scoping	Scoping Phase. Pre Implementation of programme.		Newton scoping exercise. Opportunity finding				OC																																																
Reporting			Feedback to Stakeholders.					OC																																																
Set-up / Initiation			Decision to adopt or not adopt Newton's recommendations								OC																																													
Implementation planning			Project team set up					OC																																																
Set-up / Initiation			Stakeholder analysis completed.																OC																																					
Risk management			Risk Issue register in place												RC				OC																																					
Financial Assurance			Finance Lead brief and assigned.																																																					
Implementation			Project Lead																																																					
Implementation			Project Lead sign off																OC																																					
Scoping			Executive sign off																RC					OC																																
Scoping																																																									
Scoping																																																									
Scoping			QA Assessment Completed																																																						
Risk management			QIA proforma risks identified, circulated to project leads for their completion																OC																																					
Scoping																																																									
Scoping																																																									
Scoping																																																									
Scoping			Handover / sign off																																																						
Communication & engagement plan			TORs agreed																																																					
Communication & engagement plan			Schedule of meetings.											OC																																										
Scoping																																																									
Scoping																																																									
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Scoping																																																									
Scoping																																																									
Scoping																																																									
Scoping																																																									
Scoping			project resource signed off																					RC																																
Implementation	Implementation Phase																																																							
		Sam Hooper	1. completion of Clinic Code Clean up																																	O																			
Implementation planning	Improved efficiency of Outpatient booking over the course of the project term 1. Clinic Code Clean up	SH	Decision on adopting PAS Proposal to standardise and rationalise Clinic names and Codes.								OC																																												
Scoping		AS / SP	Arrange meeting to agree resources to be able to implement PAS clinic code standardisation and template review								OC																																												
Reporting		TJ/JH/SH	Submit a Resource Paper to Steve Peak summarising Programme costs												OC																																								
Set-up / Initiation		SP	Establish representatives from each Centre to work with core team on Clinic Code & Template review																RC				OC																																
		SH	Recruit fixed term PAS Team to support Centres with Code & Template Review. Take requirements to Vacancy Panel																													O																							
Communication & engagement plan		SH	Organise and provide Code & Template Review workshops for Centre administration representatives.																																	RC																			
Reporting		SH	Code rationalisation, closure of redundant codes																																	RC																			
Reporting		SH	Review and standardisation of Appointment Letters, DNA Letters and checking clinic location is correct																																			RC																	
Implementation planning		SP	Review of all clinic templates establishing correct capacity. Start & finish times to be standardised.																																			RC																	
Reporting		SH	Outpatient Clinic Booking Effiency SQL report by speciality needs to be linked with updated templates and rationalised for operational use																																			RC																	
		Tom Jones & David Heath	Completion Of theatre Planning and reporting tool																													O																									
Set-up / Initiation		TJ DH	Design theatres operating status at a glance / reporting tool in conjunction with theatre team.									OC																																												
Set-up / Initiation		CI / Elica	Develop prototype dashboard with Elica											OC																																											
Financial Assurance		TJ DH	Cost estimates and funding of OSAG / reporting tool to be established.											RC					OC																																						
		Elica	Specification development and indication of implementation timeframe once funding is established																											O																											
		DH TJ	Following Specification apply to Capital Planning for development costs,																													O																									
Reporting		TJ DH	To capture in session delays in theatre the current electronic data sheet needs to be altered to include reasons for delay.																																				R																	
Set-up / Initiation		TJ DH	Redesign the electronic theatre data sheet to include a field for entering "reason for delay" of the operating list. The form cannot progress until an option from a drop down has been selected.																																				R																	
Reporting		TJ DH	Higher level metrics will be reviewed at centre level and then escalated to exec level on a monthly basis to close the loop and ensure continuous improvement.																																				R																	
Reporting		TJ DH	SEMA development to capture cancellation and DNA reasons.																																				R																	
Risk management		SB/JH/AW/GO'H	RCA of cancellation / DNA on day of surgery. Establish counter measures to reduce this loss of capacity.																																				R																	
		Tom Jones & David Heath	Complete development of the day surgery Booking tool.																																																					
Reporting		SH	Matching demand with capacity. Meeting to discuss development of SEMA to visualise day surgery capacity.									OC																																												
Implementation planning		TJ DH	Design DSU booking tool												OC																																									

Communication & engagement plan	To provide IT developments to visualise & enhance operational management within outpatients, theatres & Day Surgery Wards:	TJ DH	Meet with DSU & Waiting list to further develop prototype	OC
Financial Assurance		CI / Elica	Submit detailed specification for prototype booking tool with Elica & establish cost / funding & development timeframes	R
		Tom Jones & David Heath	Completion of Outpatient clinic planner	
Reporting		DH/TJ	Arrange meeting to establish specification for the outpatient planner.	OC
Reporting		DH/TJ	Develop an out patient utilisation & availability planner.	R
Financial Assurance		CI / Elica	Submit detailed specification for prototype Clinic Planner with Elica & establish cost / funding & development timeframes	R
		Janine Harrison/Chris Evers	**Completion of the Active Booking List**	
Reporting		JH	Develop booking list tool to chronologically list outpatients.	OC
Implementation planning		JH/AW/CE	Train booking staff to be able to use new booking list.	OC
Reporting		CE	Develop SQL reporting function from new booking list for consultant and managers benefit.	OC
Communication & engagement plan		SP	Discuss options on how the Trust books & invites patients to follow up appointments.	OC
Implementation planning		SP	Include decision on adopting partial booking system for follow up appointments within June HEC paper	OC
Communication & engagement plan		SH/JH	IT solution to rationalising reminder letters when appointment has just been communicated.	R
Implementation planning		JH	Establish one booking process for discharged inpatients requiring outpatient follow-up	R
Reporting		JH / CE	Develop additional report to capture & display suspend investigations, to aid improvements in data quality	R
		Paul Amos	**e. Outpatient & Booking KPI Dashboard**	
Communication & engagement plan		TJ	Agree KPI's with the taskforce group	OC
Communication & engagement plan		TJ / Informatics	Develop current Outpatient Dashboard to be able to generate trust view measures	R
Communication & engagement plan		JH	Once measures can be viewed, taskforce to agree KPI targets	R
		Janine Harrison	**3. completion of the Booking Office Centralisation/Scheduling Improvements**	O
Communication & engagement plan		EC/JH	Develop plans to identify accommodation & running of centralised booking office	OC
		Janine Harrison	Submit paper to Execs with details of booking office centralisation plan.	OC
Implementation planning		HEC	Decision by HEC on creating & funding a centralised Call & book centre.	RM RC
Financial Assurance		JH	Workforce requirements for Booking Department scoped in terms of wte numbers and appropriate structure	RC
		JH TJ	Establish Meetings to coordinate the development of the new Call Centre involving all parties: Communications & IT, Estates and Human Resources	O
		JH TJ	Submit Capital Planning Paper with details of all the Equipment & Estates costs	O
			Installation of Telephony	
		Paul Corbett	Establish Telephony Costs for Capital Planning Paper	O
		Paul Corbett	Once Funding established order Telephony equipment	O
		Paul Corbett	Installation of Telephony & Training Staff	O
			Completion of Estates	
		Chris Needham	Estates to provide detailed plans & costs for converting Treatment Centre Meeting Rm 1 and Anaesthetic Seminar Room into Call Centre	O
		Chris Needham	Provide costs for replicating Seminar Room Services down in the Waiting List Office on the groundfloor of the Treatment Centre	O
			Resourcing, HR	
		JH	Submit HR paper to TNCC for consultation period	O
	3) Call Centre set up and Scheduling improvements	JH	Recruit agreed posts through vacancy panel following positive HEC decision. Ensure correct banding is established at Agenda for Change Panel	O
		JH / AW	Conduct change of circumstance interviews with affected staff	O
		JH		
			Procurement & IT	
		JH	Establish Furniture Costs and funding for Call Centre	O
		Angela Lewis	Establish IT requirements and costs to support IT infrastructure within Call Centre	O
		Angela Lewis	Liaise with Estates to establish appropriate area to house IT server	O
			Standard Operating Library	
Risk management		JH	Development of a standard operating library for all processes within the entire programme	OC
			ShropDoc Contract	
Communication & engagement plan		Peter Skitt / JH	Review of ShropDoc Emergency Admissions out of hours contract	O O
Communication & engagement plan		Peter Skitt / JH	Review of Shropdoc MSK OP booking contract	O O
			Radiology Information System (RIS)	
Reporting			Establish RIS by end of June 2012	OM R
			WLI Authorisation Process	

Risk management			Develop standard operating procedure to establish justification for WLI sessions & assurance that core capacity is fully used before WLI agreed.							OC																																																	
Financial Assurance			Sustainability review of current WLI activity and reduction plan to be established													OC																																									
			Utilise CALM																																																								
Monitoring			Pilot CALM within Gynaecology					OC																																																			
Reporting			Presentation of CALM to taskforce by IT													OC																																									
Communication & engagement plan			Arrange meeting amongst surgical centre, IT & CI to discuss introducing CALM for elective admission planning.																	RC			OC																																				
Implementation			Relaunch CALM function in SEMA to assist elective planning																															O																									
			Understanding TCI process																																																								
Communication & engagement plan		DH/TJ	Preparatory mapping of current state from referral to admission.																				OC																																				
Implementation planning		MC	Organise current state mapping workshop																					OC																																			
Communication & engagement plan		MC/CI team	Facilitate mapping workshop for elective TCI process																												O																												
	4) Choose and Book		**4. Integration of Choose & Book**																															O																									
Communication & engagement plan		MC	Establish working group to improve current service, include advice & guidance in future plans																					OC																																			
		MC	Scope LHE Advice & Guidance service. Future direction																					OC																																			
Set-up / Initiation		JH	Improve Directory of Services to reflect curren clinical service (DOS overhaul)																															O																									
		JH	Recruit agreed posts through vacancy panel following positive HEC decision. Ensure correct banding is established at Agenda for Change Panel																															O																									
		JH	Organise & facilitate Choose & Book Meeting to plan course of improvement actions. Incorporating proposal of new referral processes that should be adopted by the new Call Centre.																											O																													
Communication & engagement plan		JH	Understand impact of RAS / TRAQ on SaTH																															O																									
		JH	SATH CAB team setup/recruitment																															O																									
		JH	Training ,Engagement & Work List management across SATH for Choose and Book																																				O																				
		AW	IT Sense Check for CAB across SATH & Smartcard Access and Issue																												O																												
		JH	Capacity Management, ASI's Management and Process & Polling Ranges/Horizons Review across ALL specialties																																							O																	
	5) Clinical Outcome Forms	Sam Hooper	**5. Completion and implementation of the Clinic Outcome Form**																							O																																			
Set-up / Initiation		SH/AW	Redesign clinic outcome form & test in Mark Cheetham's clinic									OC																																																
Set-up / Initiation		SH/AW	Extend testing of new form to Andrew Tapp's clinic.										OC																																														
Communication & engagement plan		TJ DH	Establish which personnel need awareness training																				OC																																					
		SH	Circulate new COF to Centre Chiefs/Centre Managers for comment and approval.																					O																																			
Implementation planning		SH/AW	Training admin, nursing & clinicians in the new documentation format																				RC					RM				R																												
Implementation planning		SH/AW	Roll out new clinic outcome forms to all areas																					RC							R																												
Communication & engagement plan		SH/AW	Communicate via quality news the new format and importance of completing Clinic Outcome Form.																						RC						R																												
	6) TCI Forms		6. Redesign & update Operation coding trees within Sema & all TCI forms																																																								
Risk management		DH SH	Review and alter all operating coding trees within PAS system. Updating operation description, laterality, timing, Pre op LOS post op LOS, OPCS codes.	OC																																																				
Risk management		DH SH	Rewrite all TCI forms to reflect updated operating coding trees.																						OC																																		
Communication & engagement plan		TJ DH	Organise mapping workshop for elective TCI process																												O																												
Communication & engagement plan		TJ DH	Map the elective booking process from TCI form completion to patient arriving in theatre																												O																												
	Stakeholder Engagement		**Communication Plan**																																																								
Communication & engagement plan			Communication bulletin to be circulated following monthly Taskforce meeting							OC																																																	
Communication & engagement plan			Patient feedback and monkey survey											OC																																											
Communication & engagement plan		Dave Heath / Tom Jones	Consultants surgeons consulted over version 2 of TCI forms										OC																																														
Communication & engagement plan			Surgery management team consulted over OSAG & Theatre reporting tool (Tony Fox, Sara Biffen & Louise Gill 8th May 2012 & Lynn Akitkin 16th May)											OC																																											
Communication & engagement plan			Fiona Gabbitas, Mandy Davies & Jenny Bridges consulted over Outpatients Planner (10th May 2012 Learning centre, RSH)									OC																																																
Communication & engagement plan			17th May 2012OSAG & Theatre reporting tool Change request form sent to IT											OC																																											
Communication & engagement plan			RSH Theatre staff consulted over OSAG & theatre reporting tool (3rd May 2012)																																																							
Communication & engagement plan			PRH Theatre staff consulted over OSAG & theatre reporting tool (18th May 2012)												OC																																										
Communication & engagement plan			PRH Theatre staff consulted over OSAG & theatre reporting tool (18th May 2012)												OC																																										
Communication & engagement plan			PRH Theatre staff consulted over OSAG & theatre reporting tool (25th May 2012)															OC																																									
Communication & engagement plan			RSH DSU staff consulted over OSAG & Theatre reporting tool. (25th May 2012)																																																							
Communication & engagement plan			QIA sheet sent to Janine Harrison & Sara Biffen for completion (15 June 2012)																																																							
Communication & engagement plan		Tom Jones / Steve Peak	Ensure meaningful engagement and participation with Patient representatives during the life of the project															OC																																									