

PROJECT MANAGEMENT TOOL #1: PROJECT CHARTER

Use this tool to define expectations for both the sponsor and team members. Hover your mouse over the fields to see example text to help you get started.

Project Name: ABC Telehealth Services Project

Sponsor: ABC Health Center (Project owner or person financially responsible for the project)

Problem Statement

What business issue will this project address?

The COVID-19 Pandemic has created significant patient access issues for health centers. With an anticipated focus on preparing for exponentially expanding screening, triage, and related treatment for COVID-19, day-to-day care of many health center patients has been disrupted.

Objective

What is the desired outcome of this project? What goals will be met and what benefits attained?

There are several forms of electronic communication that are proving to be essential in the clinical environment imposed by COVID-19. They are telehealth, virtual communication services (a.k.a., Virtual Check-In), and E-visits. Our objective in this project is to provide telehealth services to health center patients under the current climate.

Telehealth, Virtual Check-In and E-visits

- **Telehealth** is defined as the use of electronic information and telecommunication technologies to support long-distance clinical health care, patient and professional health-related education, public health, and health administration.
 - **Virtual Check In** services permit patients, without going to an office, to talk with a doctor, NP, PA via a phone or integrated audio-visual system or evaluate a captured image or video.
 - **E-visits** allow a patient and a provider to interact via a patient portal vs. face-to-face at an office.
-

Scope

What are this project's high-level deliverables? What is outside of its scope?

| IN-SCOPE | OUT-OF-SCOPE |
|---|---|
| <ul style="list-style-type: none">• Staff acquired and assigned• Acquisition of technology | <ul style="list-style-type: none">• Allocation of space• Non-telework related office equipment |

Resources

What resources—financial, human, or otherwise—are allotted to the project?

| | |
|------------------|--|
| BUDGET | \$75,000 |
| PROJECT MANAGER | Sheila |
| KEY TEAM MEMBERS | Nawid, Jesus, Jennifer |
| KEY STAKEHOLDERS | Anyone having any internal or external interest in the project |

Schedule Boundaries

What goals and constraints govern the project schedule?

- Software design lead for project displays is not available until August 2020.

Budget Boundaries

What goals and constraints govern the project budget?

- Budget cannot exceed \$75,000 with a 10% contingency reserve

Milestones

What are the project's key milestones?

| MILESTONES | TARGET DATE |
|---|--------------|
| Initiation: Develop project charter. | May 1, 2020 |
| Planning: Select technology | May 10, 2020 |
| Implementation: Start technology buildout | May 17, 2020 |
| Monitoring and Control: Testing | May 24, 2020 |
| Closeout: Project Evaluation | May 30, 2020 |

Risks

What major threats and opportunities must the project team plan for?

Threat: current technology host contract ending and bringing on a new vendor in April.

Technology compatibility for patients and the health center throughout project life cycle

Sponsor signature:

Print Name

Signature

Date

This resource is supported by the Health Resources and Services Administration (HRSA) of the U.S. Department of Health and Human Services (HHS) as part of an award totaling \$6,375,000. The contents are those of the author(s) and do not necessarily represent the official views of, nor an endorsement, by HRSA, HHS, or the U.S. Government. For more information, please visit [HRSA.gov](https://www.hrsa.gov).