

## Small and Medium Practice Project Plan Task List Template

| Project Plan Task List Template |  |
|---------------------------------|--|
| <b>Purpose</b>                  | <p>The Small and Medium Physician Practice Project Plan Task List outlines the action steps and associated timing for the ICD-10 implementation. The Provider should adopt the ICD-10 Project Plan Task List and add detailed supporting action steps and completion dates specific to their schedule for ICD-10 implementation.</p> <p>The ICD-10 Project Plan Task List is high level and therefore applicable for all Providers.</p> <p>CMCS purposefully keeps the details for each milestone and action step at a level applicable to all Providers. The Provider should modify the ICD-10 Project Plan Task List to do the following:</p> <ul style="list-style-type: none"> <li>• Evolve the plan into a detailed and comprehensive description of action steps and activities associated with implementing ICD-10 across the Provider’s business processes, systems and policies, and</li> <li>• Continue to update the plan throughout ICD-10 Implementation, specifically during exit/entry to new ICD-10 implementation phases, as indicated in the guide.</li> </ul>   |
| <b>Instructions</b>             | <p>In modifying the timeline, however, the Provider should keep in mind the need to meet the October 1, 2013 compliance date. The ICD-10 Project Plan Task List groups the milestones and action steps by (1) Actions to Take Immediately and (2) Quarter.</p> <p><b>Action steps:</b> The action steps identified in the Project Plan Task List are high-level action steps that require further definition. The provider should add detailed action steps to capture the work effort accurately. These action steps include those necessary to support ICD-10 implementation throughout the provider's business processes, policies and systems.</p> <p><b>Estimated Start Date:</b> Estimated date the provider will begin the action step</p> <p><b>Estimated End Date:</b> Estimated date the provider will complete the action step</p> <p><b>Predecessor action steps:</b> The Predecessor column identifies the action steps the provider should complete prior to beginning another action step. The provider should modify the Predecessor column when adding action steps to the Project Plan Task List.</p> <p><b>Task Owner:</b> The provider should identify individuals responsible for completing the work effort.</p> <p><b>Estimated Work Effort:</b> Total hours allotted to complete the task</p> <p><b>Resource Names:</b> Name(s) of key individual(s) supporting the task</p> |

| ICD-10 Project Plan Task List  |                      |                    |                          |                   |                               |                |          |
|--|----------------------|--------------------|--------------------------|-------------------|-------------------------------|----------------|----------|
| Action Steps   | Estimated Start Date | Estimated End Date | Predecessor Action Steps | Action Step Owner | Estimated Work Effort (Hours) | Resource Names | Comments |
| <b>Small and Medium Practice Implementation Timeline</b>   |                      |                    |                          |                   |                               |                |          |
| <b>Actions to Take Immediately</b>   |                      |                    |                          |                   |                               |                |          |
| Inform physicians/staff of upcoming changes and the practice's implementation plans (1 month)  |                      |                    |                          |                   |                               |                |          |
| Identify and establish an ICD-10 coordination manager for your practice (1 month)  |                      |                    |                          |                   |                               |                |          |
| Perform an impact assessment and identify potential changes to existing work flow and business processes (6 months)<br><ul style="list-style-type: none"> <li>Collect information on current use of ICD-9 and a list of staff members who need ICD-10 resources and training. Staff training will most likely involve billing and other financial personnel, coding staff, clinicians, management, and IT staff, if applicable</li> <li>Evaluate the effect of ICD-10 on other planned or on-going projects (e.g., Version 5010 transition, EHR adoption and Meaningful Use)</li> </ul>                                      |                      |                    |                          |                   |                               |                |          |
| Determine business and technical implementation strategy (1 month)   |                      |                    |                          |                   |                               |                |          |
| Develop an implementation plan, including a memo/letter communicating the new system changes to staff (3 months)   |                      |                    |                          |                   |                               |                |          |
| Estimate and secure budget, including all costs associated with implementation such as software and software license costs, hardware procurement, and staff training costs (2 months)  |                      |                    |                          |                   |                               |                |          |
| Contact systems vendors, clearinghouses, and/or billing services to assess their readiness for ICD-10 and evaluate current contracts (2 months)<br><ul style="list-style-type: none"> <li>Determine if systems vendors and/or clearinghouses/billing services will support changes to systems, supply a timeline and cost estimate for implementation changes, and identify when testing will occur</li> <li>Determine anticipated testing time and schedule (when they will start, how long they will need, and what will be needed for testing)</li> <li>If vendor(s) provide solution, then engage immediately</li> </ul> |                      |                    |                          |                   |                               |                |          |
| Begin internal system design and development, if not started already (work with vendors as needed)   |                      |                    |                          |                   |                               |                |          |
| Seek resources from CMS, professional and membership organizations to help with transition   |                      |                    |                          |                   |                               |                |          |
| Educate staff on changes in documentation requirements from health plans   |                      |                    |                          |                   |                               |                |          |
| <b>Winter 2012</b>   |                      |                    |                          |                   |                               |                |          |
| Complete system design and development   |                      |                    |                          |                   |                               |                |          |
| Continue to educate staff on changes in documentation requirements from health plans   |                      |                    |                          |                   |                               |                |          |
| Start to conduct internal testing. This must be a coordinated effort with internal coding, billing and technical resources and vendor resources (9 months)   |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel should contact IT support personnel to begin implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy (11 months)  |                      |                    |                          |                   |                               |                |          |
| <b>Spring 2012</b>   |                      |                    |                          |                   |                               |                |          |
| Continue to educate staff on changes in documentation requirements from health plans   |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy  |                      |                    |                          |                   |                               |                |          |

| Action Steps   | Estimated Start Date | Estimated End Date | Predecessor Action Steps | Action Step Owner | Estimated Work Effort (Hours) | Resource Names | Comments |
|--|----------------------|--------------------|--------------------------|-------------------|-------------------------------|----------------|----------|
| <b>Summer 2012</b>   |                      |                    |                          |                   |                               |                |          |
| Continue to educate staff on changes in documentation requirements from health plans   |                      |                    |                          |                   |                               |                |          |
| Continue internal testing and vendor code deployment (3 months)  |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy      |                      |                    |                          |                   |                               |                |          |
| <b>Fall 2012</b>   |                      |                    |                          |                   |                               |                |          |
| Complete educating staff on changes in documentation requirements from health plans  |                      |                    |                          |                   |                               |                |          |
| Complete internal testing and vendor code deployment   |                      |                    |                          |                   |                               |                |          |
| Begin external testing (10 months)   |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy      |                      |                    |                          |                   |                               |                |          |
| <b>Winter 2013</b>   |                      |                    |                          |                   |                               |                |          |
| Continue external testing  |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy      |                      |                    |                          |                   |                               |                |          |
| <b>Spring 2013</b>   |                      |                    |                          |                   |                               |                |          |
| Continue external testing  |                      |                    |                          |                   |                               |                |          |
| Conduct intensive training for coders on day-to-day basis (6 months)   |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy      |                      |                    |                          |                   |                               |                |          |
| <b>Summer 2013</b>   |                      |                    |                          |                   |                               |                |          |
| Complete external testing  |                      |                    |                          |                   |                               |                |          |
| Work with vendor contractor(s) to transition ICD-10 systems to production  |                      |                    |                          |                   |                               |                |          |
| Continue intensive training for coders on day-to-day basis, if applicable  |                      |                    |                          |                   |                               |                |          |
| Provider or key office personnel and IT support personnel should continue implementing the ICD-10 project plan throughout 2012 until ICD-10 implementation. Action steps include reviewing the sample data reports, testing, and evaluating data for accuracy      |                      |                    |                          |                   |                               |                |          |
| <b>Fall 2013</b>   |                      |                    |                          |                   |                               |                |          |
| Work with vendor contractor(s) to complete transition ICD-10 systems to production   |                      |                    |                          |                   |                               |                |          |
| Complete intensive training for coders on day-to-day basis, if applicable  |                      |                    |                          |                   |                               |                |          |
| October 1, 2013: ICD-10 system implementation for full compliance. ICD-9 codes will continue to be used for services provided before October 1, 2013   |                      |                    |                          |                   |                               |                |          |
| <i>CMS consulted resources from the American Medical Association (AMA), the American Health Information Management Association (AHIMA), the North Carolina Healthcare Information &amp; Communications Alliance (NCHICA) and the Workgroup for Electronic Data</i> |                      |                    |                          |                   |                               |                |          |