



SOLVER PROJECT INITIATION DOCUMENT

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Strategic Planning and Performance Management

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Solver Project

PROJECT INITIATION DOCUMENT

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0 DOCUMENT CONTROL

0.1 Document History

Version No	Date	Comment
V0.1	15.01.2008	Initial version
V0.2	21.01.2008	Updated following internal review
V1.0	24.1.08	Updated following Project Board Meeting

0.2 Document Purpose

The purpose of this document is to define the Solver Project, to form the basis for its management and the assessment of overall success.

0.3 Document Location

The latest version of the document can be obtained by contacting the Project Manager located in IS Programme Office, Ballymoney Street, Ballymena.

0.4 Document Scope

The document focuses on the implementation of the Solver system.

0.5 Glossary of Terms

PAS	Patient Administration System
IS	Information Services
PfA	Priority for Action
IT	Information Technology

1 PROJECT BRIEF

1.1 Background

A Priority for Action 2007/2008 outlined that 'By March 2008 all complex discharges from an acute hospital will take place within 72 hours of a patient being deemed medically fit for discharge. To action this Trusts must be responsible for ensuring that proper information and communication systems are in place to enable discharge targets to be managed as well as monitored.

1.2 The Need for the Project

The need for the project is to implement a system which will:-

- Provide real time information system to provide up to date information re patient details in terms of hospital stay and hospital journey.
- Provide an estimated length of stay.
- Provide an estimated date of discharge.
- Be accessible and user friendly.
- Facilitate the tracking of events associated with the discharge process.
- Improve the Trust's ability to meet the PfA discharge target.

1.3 Objectives

The objectives of this project are as follows:

- To implement the system by 31st March 2008 in United.
- To address any IT infrastructure requirements during implementation.
- To establish training requirements and provide suitable training.

1.4 Constraints

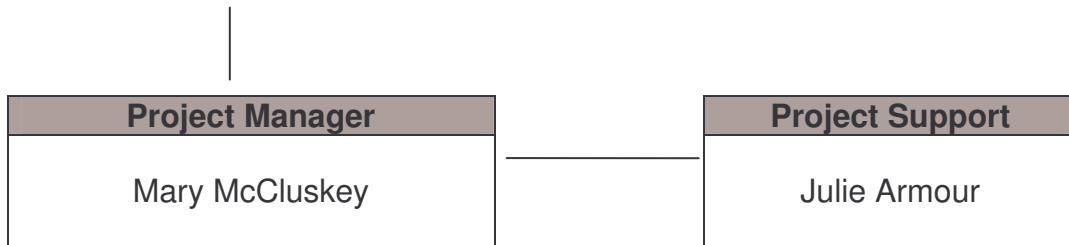
- The system has to be operational by 31 March 2008 in United.

1.5 Risks

- Lack of Professional time and resources

2 ORGANISATION STRUCTURE

PROJECT BOARD		
Executive	Garrett Martin	Assistant Director Medicine & Unscheduled Care
Senior User	Rosemary Farrell	Head of Information & Records Management
Senior Support	Wilbert Allen	IS Programme Manager



Project Team	
Roisin Doyle	General Manager, Operations Access Improvement & Reform
Heather Simpson	Administration Manager
Teresa McAllister	Admission & Discharge Co-ordinator
Philip Bartley	Lead Nurse Older People
Linda Millar	General Manager, Surgery
Donna Hanna	General Manager, Specialist Medicine, Acting
Paul Matchett	IT Manager
Sean Moran	Physiotherapist
Susan Murphy	Corporate Information Manager
Una Campbell	Project Officer

A description of each role can be found in Appendix 1.

3 PROJECT ISSUES

This section details the issues, assumptions, risks and constraints identified at the start-up of Solver Project. Throughout the project, updates to issues and risks will be made in the project issue and risk logs respectively.

3.1 Issues

- The Solver server needs to be upgraded.
- There is insufficient infrastructure.
- Solver does not feed back to PAS.
- PAS is not being maintained 'real-time'.
- Need to decide who, when and where.

3.2 Assumptions

- Install in wards associated with delayed discharges.
- Install in Mid Ulster Hospital by 31.12.07 as a pilot.
- Real-time PAS will be required.
- Service buy in.

3.3 Risks

- Risk of PAS not delivering – poor performance.
- Wrong information on PAS will result in incorrect information on the Solver system.
- Unable to gain co-operation of all Departments and Directorates required for success of the project
- There may be User resistance.
- The product may not deliver.
- Additional recording may not be undertaken within existing duties.
- Processes change continually.

3.4 Constraints

- Solver has to be operational by 31 March 2008 in United.

4 PROJECT PLANS

4.1 Product Breakdown Structure

M1 Project Initiation Document (PID)

T1 Installed & Tested System

T2 Process Review

T3 Protocols

T4 Local Site Implémentation

T5 System Demonstrations

T6 System Configuration

T7 Area Testing

T8 Trained Users

T9 System Review

A description of each product can be found in Appendix 2.

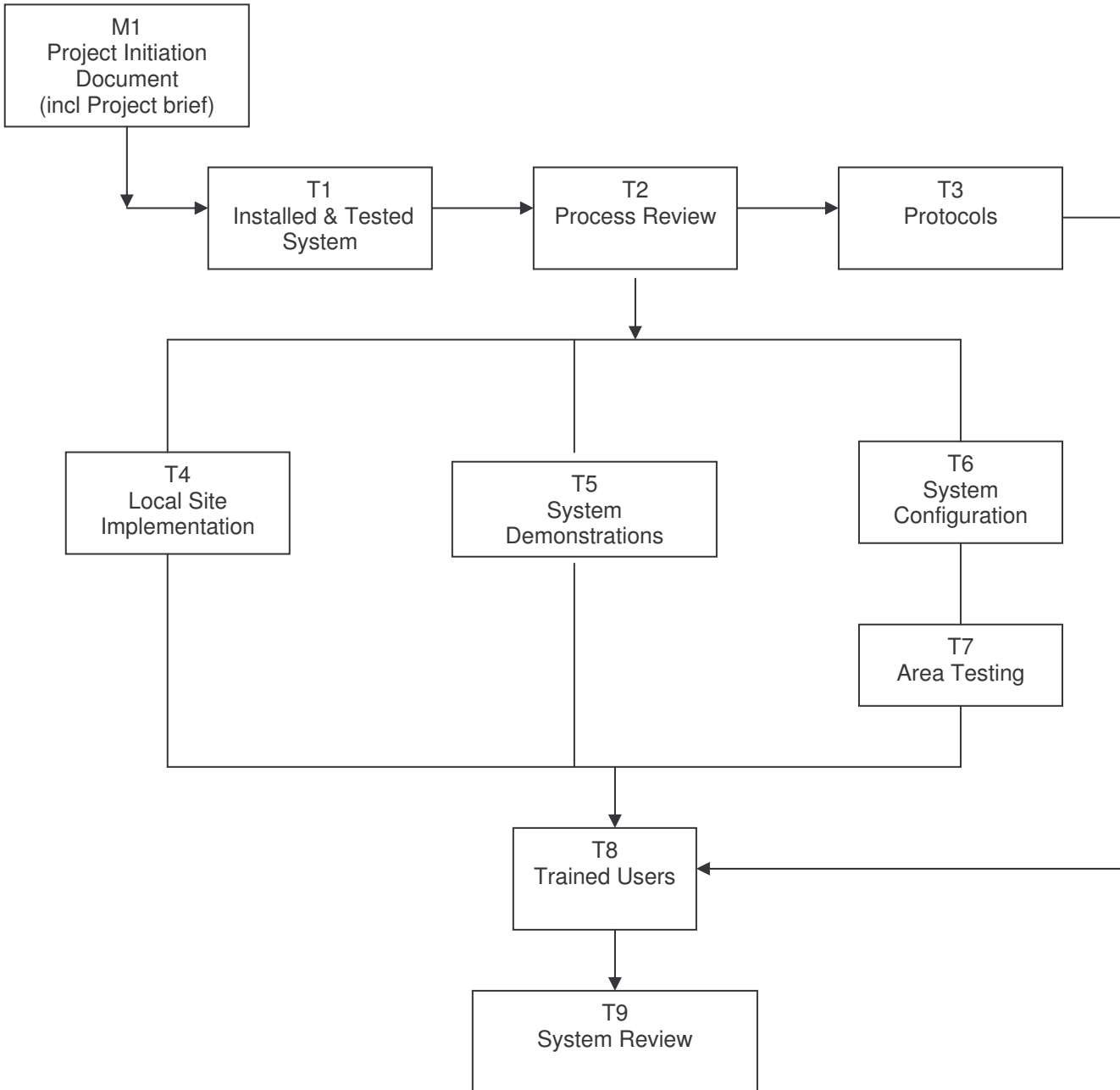
Products T2 – T8 will be duplicated for each area (hospital/specialty).

Additional management products will include:

- Risk Log
- Issue Log
- Lessons Learned Log
- Action Log

As defined in the PRINCE2 manual.

4.2 Product Flow Diagram



Products T2 – T8 will be duplicated for each area (hospital/specialty).

4.3 Technical Plan

ID	Task Name	Start	Finish	Precedes	Resource Names	er	Novemb	Decemb	January	Februar	March	April	May
							E	B	M	E	B	M	E
1	Solver Implementation	Wed 07/11/07	Mon 19/05/08										
2													
3	M1 Project Monitoring & Control	Wed 07/11/07	Tue 19/02/08										
14													
15	Solver Implementation - MUH	Wed 07/11/07	Mon 19/05/08										
16	✓ T1 Installed & Tested System	Wed 07/11/07	Thu 13/12/07										
17	✓ SOLVER Server	Wed 07/11/07	Mon 03/12/07										
22	✓ SOLVER installation	Tue 04/12/07	Thu 08/12/07										
23	✓ PAS Download	Thu 22/11/07	Thu 13/12/07										
27	T2 Process Review	Thu 15/11/07	Fri 22/02/08										
28	✓ Process map and supporting documentation	Thu 15/11/07	Wed 21/11/07										
29	Gap analysis between current processes and Solver p	Thu 22/11/07	Wed 28/11/07	28									
30	Gap Analysis with MD Discharge Planner	Mon 21/01/08	Fri 25/01/08	51FS+5 c	UC								
31	Review Discharge form	Mon 28/01/08	Fri 01/02/08	30	TM								
32	Reporting requirements	Mon 04/02/08	Fri 08/02/08	31									
33	Identify additional requirements for Solver System	Mon 11/02/08	Fri 22/02/08	32									
34	✓ T3 Protocol	Mon 24/12/07	Fri 04/01/08										
35	✓ Define responsibilities in the patient flow process	Mon 24/12/07	Fri 28/12/07										
36	✓ Contingency Plan	Mon 31/12/07	Fri 04/01/08	35									
37	✓ Agree protocol / contingency	Fri 04/01/08	Fri 04/01/08	36									
38	T4 Local Site Implementation	Thu 15/11/07	Thu 20/12/07										
39	✓ Site visit to identify users/locations	Wed 12/12/07	Wed 12/12/07		MM								
40	✓ Identify IT requirements	Thu 15/11/07	Thu 15/11/07		MM								
41	✓ Identify Training requirements	Thu 15/11/07	Thu 15/11/07		MM								
42	✓ IT Survey	Thu 15/11/07	Thu 22/11/07	39,40,41	MMK								
43	Site infrastructure	Thu 22/11/07	Thu 20/12/07										
44	Cabling	Thu 22/11/07	Thu 20/12/07	42	PM								
45	PC installation	Thu 22/11/07	Thu 20/12/07	42	PM								
46	✓ T5 Software Demos	Mon 03/12/07	Thu 27/12/07										
47	✓ SOLVER demo	Mon 03/12/07	Mon 03/12/07		PO								

Project: Project1 Date: Mon 21/01/08	Task	Milestone	External Tasks
Split	Summary	External Milestone	Deadline
Progress	Project Summary		

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ID	Task Name	Start	Finish	Precedes	Resource Names	Timeline																	
						Nov	Dec	Jan	Feb	Mar	Apr	May	E	B	M	E	B	M	E	B	M	E	B
48	✓ Patient Flow Workshop	Tue 18/12/07	Tue 18/12/07		RD,WA,MM																		
49	✓ Install Solver on PCs	Thu 20/12/07	Thu 27/12/07	43																			
50	T6 System Configuration	Wed 07/11/07	Wed 05/12/07																				
51	✓ Liaise with Geckotech re download spec	Thu 22/11/07	Wed 05/12/07		MM																		
52	Implement download	Wed 07/11/07	Wed 07/11/07																				
53	T7 Area Testing	Wed 07/11/07	Wed 07/11/07																				
54	Established test environment	Wed 07/11/07	Wed 07/11/07																				
55	Documented Test scripts	Wed 07/11/07	Wed 07/11/07																				
56	Documented Test Procedures and Outcomes	Wed 07/11/07	Wed 07/11/07																				
57	✓ T8 Trained Users	Wed 07/11/07	Fri 21/12/07																				
58	✓ Agree training venues	Mon 19/11/07	Fri 23/11/07		JA																		
59	✓ Nominate trainer	Wed 07/11/07	Wed 07/11/07		WA																		
60	✓ Schedule staff	Thu 22/11/07	Thu 29/11/07	38	UC,RD																		
61	✓ Training course	Wed 19/12/07	Fri 21/12/07		KS																		
62																							
63	Solver Implementation - Whiteabbey/Moyle	Fri 14/12/07	Tue 04/03/08																				
64	T2 Process Review	Fri 14/12/07	Tue 19/02/08	16																			
65	Site visit to identify users/locations & process	Tue 15/01/08	Tue 15/01/08		UC																		
66	Identify Training requirements	Tue 15/01/08	Tue 15/01/08	65	UC																		
67	Process map and supporting documentation	Wed 16/01/08	Tue 22/01/08	66	UC,MM																		
68	Gap analysis between current processes and Sol	Wed 23/01/08	Tue 29/01/08	67	UC,MM																		
69	Review Discharge form	Fri 14/12/07	Thu 20/12/07		UC,MM																		
70	Reporting requirements	Wed 23/01/08	Tue 05/02/08	67	UC,MM																		
71	Identify additional requirements for Solver System	Wed 06/02/08	Tue 19/02/08	70	UC,MM																		
72	T3 Protocol	Tue 15/01/08	Tue 29/01/08	65																			
73	Define responsibilities in the patient flow process	Tue 15/01/08	Tue 22/01/08																				
74	Contingency Plan	Tue 22/01/08	Tue 29/01/08	73																			
75	Agree protocol / contingency	Tue 29/01/08	Tue 29/01/08	74																			
76	T4 Local Site Implementation	Mon 04/02/08	Tue 26/02/08	65																			
77	IT Survey	Mon 04/02/08	Tue 05/02/08		MMK																		

Project: Project1
Date: Mon 21/01/08

Task		Milestone		External Tasks	
Split		Summary		External Milestone	
Progress		Project Summary		Deadline	

ID	Task Name	Start	Finish	Predecessors	Resource Names	November		December		January		February		March		April		May		
						E	B	M	E	B	M	E	B	M	E	B	M	E	B	M
135	Solver Implementation - Surgical - Antrim Area / Braid V	Mon 25/02/08	Mon 31/03/08																	
170																				
171	Solver Implementation - Other - Antrim Area / Braid Val	Mon 10/03/08	Mon 14/04/08																	
206																				
207	Solver Implementation - Causeway	Mon 14/04/08	Mon 19/05/08																	
208	T2 Process Review	Mon 14/04/08	Mon 19/05/08																	
216	T3 Protocol	Mon 14/04/08	Mon 28/04/08	209																
220	T4 Local Site Implementation	Mon 14/04/08	Wed 07/05/08	209																
227	T5 Software Demos	Mon 14/04/08	Mon 14/04/08	209																
230	T6 System Configuration	Mon 14/04/08	Mon 28/04/08	209																
233	T7 Area Testing	Mon 28/04/08	Thu 08/05/08	230																
237	T8 Trained Users	Thu 08/05/08	Thu 15/05/08	216,233																

Project: Project1 Date: Mon 21/01/08	Task	Milestone	External Tasks
	Split	Summary	External Milestone
	Progress	Project Summary	Deadline

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APPENDICES

APPENDIX 1 ROLE DESCRIPTIONS

Project Board

The Project Board is the overall authority for the project, having specific ownership for directing a project and responsibility for delivering the required outcome or end product. It is the ultimate project authority and is responsible for the initiation, direction, review and eventual closure of the project.

To meet this function, Project Board members must have the authority required to commit resources and to initiate new work. These are the prime selection criteria for Project Board members. The Project Board comprises, as a minimum, representatives from the following three areas:

The Executive (Senior Responsible Owner) Role:

Overall Responsibility: to be ultimately responsible for the project, supported by the Senior User and Senior Supplier.

The Executive has to ensure that the project is delivering value for the time, effort, costs and resources being invested, confirming a cost-conscious approach to the project and balancing the demands of the Business, User and Specialist Provider Organisations.

The Executive will normally chair the Project Board meetings, owns the Business Case, represents the customer's interests and has final responsibility for the project.

The Senior User Role:

Overall Responsibility: Responsible for the specification of user needs, user liaison with the project team, the integrity of the desired outcome of the project and for monitoring that the solution will meet those needs within the constraints imposed upon the project.

The role represents the interests of all those affected by the outcome and the products arising from the project. The Senior User role commits user resources and monitors products against the stated and agreed requirements. This role will often involve more than one person to represent all the user interests.

The Senior Supplier Role:

Overall Responsibility: Representing the interests of those designing, developing, facilitating, procuring and implementing the project products.

The Senior Supplier role must have the authority to commit or acquire the (specialist) supplier resources required.

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The Project Assurance Function

Accountability for assuring the project always resides with the Project Board and cannot be delegated; the day to day tasks involving the assurance function, may, however, be delegated to appropriate individuals.

Examples of assurance are verifying that the products/deliverables of the project conform to agreed quality criteria; that they perform in accordance with the users' statement of requirement; that schedule and cost budgets are being met; and that the business case (business benefits and risks) remains viable. Even if these assurance tasks are delegated, the responsibility for getting it right rests with the Project Board (and ultimately with the Executive).

Project Manager

All projects need a focal point to plan, control and oversee the day to day work and to co-ordinate the total effort. The Project Manager fulfils this role. PRINCE 2 requires that all projects under the control of the methodology have a Project Manager.

The role of the Project Manager is to:

- Ensure that all the required products are delivered to the desired standard of quality and within the specified constraints (e.g. time scale)
- Prepare Project Management documentation
- Chair Project Team meetings
- Organise people to meet objectives
- Anticipate and solve problems
- Report to and take direction from the Project Board
- Present regular Highlight Reports to the Project Board
- Participate in project team activities

The Project Manager is required to:

- Drive the project forward and maintain commitment to it
- Communicate with all elements of the project structure

Project Team

It is the responsibility of the Project Team to deliver the products to the required standard of quality and within specified constraints of time.

The specific tasks of members of the Project Team are:

- To represent other staff in their area, bringing their views to the project team for consideration and communicating back on the discussions and decisions made.
- To carry out activities as specified in the plans.

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- To consult and liaise with personnel from various departments as necessary.
- To attend Project Team meetings.
- To liaise with the Project Manager and inform him/her of any deviations from the agreed activities.
- To act as team managers, planning and controlling specialist areas, including the setting up of sub-teams if required and feeding back to the Project Manager on progress.

Project Support

The main tasks of this role are to:

- Take minutes of meetings and maintain lists of action points
- Set up and maintain a filing system for the project
- Control access to the master copy of project management documentation
- Issue copies of product versions as they are amended/altered
- Undertake aspects of project team work as required

Further information on each role can be found in the PRINCE2 manual.

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APPENDIX 2 PRODUCT DESCRIPTIONS

Product Reference:	M1
Product Name:	Project Initiation Document
Description/ Purpose:	To define the project, it's management and provide a basis for the assessment of success.
Composition:	A document containing: <ul style="list-style-type: none"> • Project Brief. • Organisation Structure. • Risks, Issues, Constraints, Assumption. • Product List. • Product Flow Diagram. • Technical Plan detailing Activities, Timescales and Responsibilities. • Role Descriptions. • Product Descriptions.
Derivation:	<ul style="list-style-type: none"> • PRINCE2 Methodology. • Project Planning Workshop (13.11.07).
Provider/Author:	Project Manager
Quality Method:	Formal Review.
Quality Reviewers:	Project Board.
External Dependencies:	None.

Product Reference:	T1
Product Name:	Installed & Tested System
Description/ Purpose:	To provide a tested system ready for configuration for each area. To implement and test the required interfaces to PAS (Patient Administration System).
Composition:	<ul style="list-style-type: none"> • Established live and test environment. • Commissioned server hardware, operating system and a database software. • System installed and configured. • Configured interfaces. • Available client query tool. • Signed support contract. • Documented test procedures and outcomes.
Derivation:	<ul style="list-style-type: none"> • PAS dataset specifications. • Server Specification.
Provider/Author:	IT Manager, Project Team, Supplier
Quality Method:	Informal Review.
Quality Reviewers:	Project Team.
External Dependencies:	External supplier.

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Product Reference:	T2
Product Name:	Process Review
Description/ Purpose:	To review current admission and discharge processes.
Composition:	<ul style="list-style-type: none"> • Process map and supporting documentation. • Existing documentation. • Gap analysis between current processes and Solver processes. • Look at reporting requirements. • Identify additional requirements for Solver System.
Derivation:	<ul style="list-style-type: none"> • T1, installed and tested system. • Existing Documentation.
Provider/Author:	Project Team.
Quality Method:	Informal Review.
Quality Reviewers:	Area Co-ordinator and General Manager for Operations Access Improvement and Reform.
External Dependencies:	None.

Product Reference:	T3
Product Name:	Protocols
Description/ Purpose:	To provide a protocol for use of Solver in each area.
Composition:	<ul style="list-style-type: none"> • Table defining responsibilities in the patient flow process. • Contingency Plan in event of Solver system being unavailable.
Derivation:	T2, Process Review. Existing Protocols.
Provider/Author:	Project Team.
Quality Method:	Informal Review.
Quality Reviewers:	Area Co-ordinator, General Manager for Operations Access Improvement and Reform and Assistant Director Medicine & Unscheduled Care.
External Dependencies:	None.

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Product Reference:	T4
Product Name:	Local Site Implementation
Description/ Purpose:	To provide a suitable infrastructure and access for each area to use the Solver system.
Composition:	<ul style="list-style-type: none">• IT survey of area.• Provision of PC's and cabling.• Installation of Solver on Desktops.
Derivation:	T2, Process Review.
Provider/Author:	IT Manager.
Quality Method:	Informal Review.
Quality Reviewers:	Project Team.
External Dependencies:	British Telecom.

Product Reference:	T5
Product Name:	System Demos
Description/ Purpose:	To provide an overview of functionality of system/workshop.
Composition:	Demos plus Q&A session.
Derivation:	Supplier.
Provider/Author:	Project Team.
Quality Method:	Informal Review.
Quality Reviewers:	Attendees.
External Dependencies:	None.

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Product Reference:	T6
Product Name:	System Configuration.
Description/ Purpose:	To configure the system for the specified area i.e. hospital/specialty.
Composition:	<ul style="list-style-type: none"> • Data load <ul style="list-style-type: none"> - Usernames. - Keyworker. - Events. - Postcodes. - Excluded wards. - POC. - Care Categories.
Derivation:	• T1, Installed System.
Provider/Author:	IS Project Officer.
Quality Method:	Informal Review.
Quality Reviewers:	Area Co-ordinator.
External Dependencies:	None.

Product Reference:	T7
Product Name:	Area Testing.
Description/ Purpose:	To provide a tested system for each area.
Composition:	<ul style="list-style-type: none"> • Established test environment. • Documented Test scripts. • Documented Test Procedures and Outcomes.
Derivation:	<ul style="list-style-type: none"> • T1, Installed & Tested System. • T2, Process Review. • T6, System Configuration. • Existing Office Procedures. • Selected Product Training Manuals. • Trust Policy Framework.
Provider/Author:	IS Project Officer.
Quality Method:	Informal Review.
Quality Reviewers:	Project Team.
External Dependencies:	None.

Product Reference:	T8
Product Name:	Trained Users.
Description/ Purpose:	The preparation and delivery of a training plan to ensure the staff using Solver are proficient in the use of the system as appropriate to their role.
Composition:	A training plan identifying type of training, Trainees,

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	<p>Training Schedule, Resources required, trainer and a Trained Trainer. Documented evidence that the planned training has taken place and has been effective.</p> <ul style="list-style-type: none"> • Attendance Lists. • Course evaluation summary. • User Manual.
Derivation:	<ul style="list-style-type: none"> • T1, installed and tested system. • T2, Process review • T3, Protocol
Provider/Author:	Nominated Trainer. IS Project Officer.
Quality Method:	Informal Review.
Quality Reviewers:	Project Team.
External Dependencies:	None.

Product Reference:	T9
Product Name:	System Review
Description/ Purpose:	To evaluate the progress of the project and make recommendations for future rollout.
Composition:	<p>A document describing:</p> <ul style="list-style-type: none"> • The progress during the project. • An assessment of the benefits achieved against the projected benefits. • Lessons Learned Log. • Review of impact of external developments on the project. • Recommendations for future stages.
Derivation:	<ul style="list-style-type: none"> • M1, Project Initiation Document.
Provider/Author:	Project Review – Project Manager. System Review – Project Team.
Quality Method:	Formal Review.
Quality Reviewers:	Project Board.
External Dependencies:	None.