

HIPAA Project Plan Template

This workbook currently provides the following worksheets:

Project Plan -- Enables the user to assign tasks, hours, level of effort, % complete, start date, finish date, start time, finish time, end date, assigned resource(s), and actual hours (There is also an associated Gantt chart within this worksheet.)

Roles - Enables users to assign personnel based on a role

Project Plan Usability Guidelines:

The following outlines a list of features associated with the **Project Plan** worksheet:

Many of the header cells have comments associated with them. These comments can be located by placing your cursor over cells with small red triangles located in the upper-right-hand corner.

The finish date can be input manually; however, the system will automatically calculate the finish date based on the assigned hours and level of effort.

There is a calculated "% complete" strictly based on the calendar.

There is a calculated "% complete" based on the hours estimated to complete the project and the tasks that have been completed. Completed tasks are identified by placing an "x" in column **A** on the same row as the completed task. When you enter an "x" in column A, that line item will automatically be grayed out, signifying that it is complete.

Ten percent will be added on to the total estimated hours to completion to account for unknowns.

The following are known limitations of this workbook:

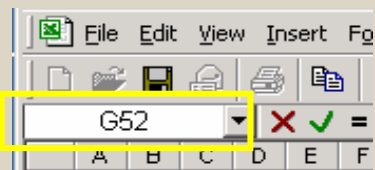
You can overallocate a resource; there is no accounting for the assignment of multiple tasks starting on the same day to a single individual. This workbook has no workload-leveling function.

The Gantt chart cannot be easily modified to represent "weeks" or "months" instead of "days."

Roles Usability Guidelines:

Purpose: The user can define specific roles that will be assigned tasks within the project plan.

Application: Some possible roles have already been established. These can be used by typing "=<<Reference Name>>" within the applicable "Assigned Resource" cell; <<Reference Name>> should be replaced with the actual reference name assigned to the role. Reference names are defined by typing the reference name in the following area:



HIPAA Compliance Project Plan

| | | 0 | | | | | | | | | | | | | |
|----------|-----------------------------------------------------------------|--------------------|-----------|-----------------|-----------------|---------------------------|--------------|----|----|----|----|---|---|---|--|
| | | % Complete => | 0% | 0% | 4/28/2003 | <= Today's Date | | | | | | | | | |
| | | Estimated Total => | 74.3 | 04/28/03 | 07/08/03 | | | 0 | | | | | | | |
| Phase | Compliance Step | Est. (hrs.) | % Comp. | Start | Finish | Assigned resource | Actual (hrs) | 27 | 28 | 29 | 30 | 1 | 2 | 3 | |
| 1 | Awareness | 12 | 0% | 04/28/03 | 05/06/03 | | 0 | | | | | | | | |
| 1.01 | Add HIPAA Compliance to Business Plans and Objectives | 2 | 0% | 04/28/03 | 04/28/03 | Principal of Organization | 0 | | | | | | | | |
| 1.02 | Establish Organization-wide HIPAA Awareness | 2 | 0% | 04/29/03 | 04/29/03 | Principal of Organization | 0 | | | | | | | | |
| 1.03 | Identify Privacy and Security Officers | 1 | 0% | 04/30/03 | 04/30/03 | Principal of Organization | 0 | | | | | | | | |
| 1.04 | Select HIPAA Project Team Members | 1 | 0% | 05/01/03 | 05/01/03 | HIPAA Security Officer | 0 | | | | | | | | |
| 1.05 | Familiarize Project Team with HIPAA Requirements | 3 | 0% | 05/02/03 | 05/02/03 | Principal of Organization | 0 | | | | | | | | |
| 1.06 | Perform Initial HIPAA Assessment | 2 | 0% | 05/05/03 | 05/05/03 | Principal of Organization | 0 | | | | | | | | |
| 1.07 | Prepare HIPAA Compliance Manual | 1 | 0% | 05/06/03 | 05/06/03 | Principal of Organization | 0 | | | | | | | | |
| 2 | Assessment | 13.5 | 0% | 05/07/03 | 05/16/03 | | 0 | | | | | | | | |
| 2.01 | Inventory Business Associates | 0.5 | 0% | 05/07/03 | 05/07/03 | Principal of Organization | 0 | | | | | | | | |
| 2.02 | Document System Inventory and Equipment | 1 | 0% | 05/08/03 | 05/08/03 | Principal of Organization | 0 | | | | | | | | |
| 2.03 | Document the Data Flow of Protected Health Informaiton | 2 | 0% | 05/09/03 | 05/09/03 | Principal of Organization | 0 | | | | | | | | |
| 2.04 | Perform a HIPAA Privacy Assessment | 2 | 0% | 05/12/03 | 05/12/03 | Principal of Organization | 0 | | | | | | | | |
| 2.05 | Perform a HIPAA Security Assessment | 2 | 0% | 05/13/03 | 05/13/03 | Principal of Organization | 0 | | | | | | | | |
| 2.06 | Perform a HIPAA Code Set Assessment | 2 | 0% | 05/14/03 | 05/14/03 | Principal of Organization | 0 | | | | | | | | |
| 2.07 | Perform a Software Application Assessment | 2 | 0% | 05/15/03 | 05/15/03 | Principal of Organization | 0 | | | | | | | | |
| 2.08 | Conduct a Vendor Security Assessment | 2 | 0% | 05/16/03 | 05/16/03 | Principal of Organization | 0 | | | | | | | | |
| 3 | Analysis | 4.5 | 0% | 05/19/03 | 05/22/03 | | 0 | | | | | | | | |
| 3.01 | Generate HIPAA Assessment Reports | 0.5 | 0% | 05/19/03 | 05/19/03 | Principal of Organization | 0 | | | | | | | | |
| 3.02 | Review HIPAA Assessment Reports | 2 | 0% | 05/20/03 | 05/20/03 | Principal of Organization | 0 | | | | | | | | |
| 3.03 | Review Existing Policies and Procedures | 1 | 0% | 05/21/03 | 05/21/03 | Principal of Organization | 0 | | | | | | | | |
| 3.04 | Review Existing Vendor Contracts | 1 | 0% | 05/22/03 | 05/22/03 | Principal of Organization | 0 | | | | | | | | |
| 4 | Strategy | 4 | 0% | 05/23/03 | 05/26/03 | | 0 | | | | | | | | |
| 4.01 | Complete a HIPAA Project Proposal | 1 | 0% | 05/23/03 | 05/23/03 | Principal of Organization | 0 | | | | | | | | |
| 4.02 | Complete Your HIPAA Project Plan | 3 | 0% | 05/26/03 | 05/26/03 | Principal of Organization | 0 | | | | | | | | |
| 5 | Implementation | 33.5 | 0% | 05/27/03 | 06/30/03 | | 0 | | | | | | | | |
| 5.01 | Develop a Notice of Privacy Practices | 1 | 0% | 05/27/03 | 05/27/03 | Principal of Organization | 0 | | | | | | | | |
| 5.02 | Review and Develop the HIPAA Policy Manual | 4 | 0% | 05/28/03 | 05/29/03 | #1 Team Member | 0 | | | | | | | | |
| 5.03 | Develop a Patient Authorization Form | 0.5 | 0% | 05/30/03 | 05/30/03 | Principal of Organization | 0 | | | | | | | | |
| 5.04 | Develop a Patient Registration Form | 0.5 | 0% | 06/02/03 | 06/02/03 | Principal of Organization | 0 | | | | | | | | |
| 5.05 | Develop a Patient Sign-in Sheet | 0.5 | 0% | 06/03/03 | 06/03/03 | Principal of Organization | 0 | | | | | | | | |
| 5.06 | Develop a Request Form for Health Record Amendment | 0.5 | 0% | 06/04/03 | 06/04/03 | Principal of Organization | 0 | | | | | | | | |
| 5.07 | Develop a Request Form for Accounting of Health Disclosures | 0.5 | 0% | 06/05/03 | 06/05/03 | Principal of Organization | 0 | | | | | | | | |
| 5.08 | Develop a Request Form for Inspecting PHI | 0.5 | 0% | 06/06/03 | 06/06/03 | Principal of Organization | 0 | | | | | | | | |
| 5.09 | Develop a Request Form for Restricting PHI Uses and Disclosures | 0.5 | 0% | 06/09/03 | 06/09/03 | Principal of Organization | 0 | | | | | | | | |
| 5.10 | Develop a Patient Complaint Form | 0.5 | 0% | 06/10/03 | 06/10/03 | Principal of Organization | 0 | | | | | | | | |
| 5.11 | Develop a Model Fax Cover Sheet | 0.5 | 0% | 06/11/03 | 06/11/03 | Principal of Organization | 0 | | | | | | | | |
| 5.12 | Develop a New Employee Checklist | 0.5 | 0% | 06/12/03 | 06/12/03 | Principal of Organization | 0 | | | | | | | | |
| 5.13 | Develop an Employee Termination Checklist | 0.5 | 0% | 06/13/03 | 06/13/03 | Principal of Organization | 0 | | | | | | | | |
| 5.14 | Generate a Network Documentation Checklist | 0.5 | 0% | 06/16/03 | 06/16/03 | Principal of Organization | 0 | | | | | | | | |
| 5.15 | Document the Organizations Contingency Plan | 3 | 0% | 06/17/03 | 06/17/03 | Principal of Organization | 0 | | | | | | | | |
| 5.16 | Obtain Signed Workforce Confidentiality Agreements | 2 | 0% | 06/18/03 | 06/18/03 | Principal of Organization | 0 | | | | | | | | |
| 5.17 | Obtain Signed Business Associate Contracts | 3 | 0% | 06/19/03 | 06/19/03 | Principal of Organization | 0 | | | | | | | | |
| 5.18 | Post the Organization's Notice of Privacy Practices | 0.5 | 0% | 06/20/03 | 06/20/03 | Principal of Organization | 0 | | | | | | | | |
| 5.19 | Update/Upgrade Software Systems | 5 | 0% | 06/23/03 | 06/24/03 | Principal of Organization | 0 | | | | | | | | |
| 5.20 | Update Code Sets | 2 | 0% | 06/25/03 | 06/25/03 | Principal of Organization | 0 | | | | | | | | |
| 5.21 | Implement Action Items from Assessment Reports | 2 | 0% | 06/26/03 | 06/26/03 | Principal of Organization | 0 | | | | | | | | |
| 5.22 | Complete HIPAA Compliance Manual | 2 | 0% | 06/27/03 | 06/27/03 | Principal of Organization | 0 | | | | | | | | |
| 5.23 | Conduct Training for Employees and Workforce Members | 3 | 0% | 06/30/03 | 06/30/03 | Principal of Organization | 0 | | | | | | | | |

