

Worksheet to Create a Performance Improvement Project Charter

What is a project charter? A project charter clearly establishes the goals, scope, timing, milestones, and team roles and responsibilities for an Improvement Project (PIP). The charter is typically developed by the QAPI committee and then given to the team that will carry out the PIP, so that the PIP team has a clear understanding of what they are being asked to do. The charter is a valuable document because it helps a team stay focused. However, the charter does not tell the team how to complete the work; rather, it tells them what they are trying to accomplish.

Project Overview

Name of project:

Plan of Care Improvement

Problem to be solved:

Plans of care to include frequency, duration of services, measurable goals for therapy, and show necessity of home care. Diagnoses on Plan of Care consistent with care and disciplines ordered. Plan of Care and interim order to be signed within 30 days.

Background leading up to the need for this project:

Upon review of audits, overall Plan of Care accuracy is at 50%. 25% of Plans of Care are signed within 30 days, 45% of Plans of Care include frequency, duration of services, measurable goals for therapy, and show necessity of home care. 80% or diagnoses are consistent with care and disciplines ordered. Based on this information, improvement in Plans of Care are required to provide quality care to patients and improve patient outcomes.

The goal(s) for this project:

Goal: Have 100% of Plan of Care and interim orders signed within 30 days of date of order by September 30, 2018.

Goal: Have 100% of Plans of Care show measurable goals for therapy and necessity of home care for all disciplines by September 30, 2018

Goal: Have 100% of Plans of Care show consistency between diagnoses and Plan of Care interventions and disciplines ordered by September 30, 2018.

Scope – the boundary that tells where the project begins and ends.

The project scope includes:

Completing Plans of care accurately, with measurable goals and necessity of home care for clinicians to follow and get signed by physician in a timely manner – goal is to have a clear plan of care to follow to affect hospitalization rates.

Project Approach

Recommended Project Time Table

Project Phase	Start Date	End Date
Initiation: Project charter developed and approved	July 1, 2018	July 31, 2018
Planning: Specific tasks and processes to achieve goals defined	July 15, 2018	July 31, 2018
Implementation: Project carried out	August 1, 2018	Sept 30, 2018
Monitoring: Project progress observed, and results documented	August 1, 2018	Sept 30, 2018
Closing: Project brought to a close and summary report written	Sept 30, 2018	October 15, 2018

Project Team and Responsibilities

Title	Role	Person Assigned
Project Sponsor	Provide overall direction and oversee financing for the project	Heather – Administrator
Project Director	Coordinate, organize and direct all activities of the project team	Steve – Clinical Manager

Project Manager	Manage day-to-day project operations, including collecting and displaying data from the project	Stephanie – RN
Team Members*	Meet to determine where deficiencies are in workflow processes, develop new sustainable processes that would assist with developing accurate care plans more quickly (i.e. EMR processes, intake processes, QA processes, field documentation)	Intake staff member – Sharon, QA staff member, PT – Cheryl, RN – Dawn

*Choice and number of team members will likely be deferred to the project manager based on interest, involvement in the process and availability.

Material Resources Required for the Project:

Access to EMR capabilities, access to documented agency workflows and policies

Barriers

What could get in the way of success?	What could you do about this?
Patient could be admitted to the hospital early in the episode (i.e. before 5-day admit window)	Educate staff to ensure immediate needs are met at initial visit and front load visits
Inadequate referral information could be given about the patient, including who the certifying physician will be	Develop a process for intake to follow up on patient with physician or caregiver before initial clinician visit
EMR has stops that do not allow creation of Plan of Care until other steps are taken	Develop a workflow around those stops

Project Approval

The signatures of the people below relay an understanding and approval of the purpose and approach to this project. By signing this document, you agree to establish this document as the formal Project Charter and sanction work to begin on the project as described within.

Title	Name	Signature	Date
Administrator			
Project Sponsor			
Project Director			
Project Manager			

*May not always have both roles.

Cited from CMS July 2018 from <https://www.cms.gov/Medicare/Provider-Enrollment-and-Certification/QAPI/downloads/PIPCharterWkshtdebedits.pdf>