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2014 Defense Health Information Technology Symposium

“Lean” Project Management for the Overworked IT Shop



“Medically Ready Force...Ready Medical Force”

DHA Vision



“A joint, integrated, premier system of health, supporting those who serve in the defense of our country.”



“Medically Ready Force...Ready Medical Force”

Learning Objectives



- Learn the difference between “operational” work and “project” work and why it’s important to make the distinction.
- Understand how to track and manage projects without being PMP certified or having a robust project staff.
- Describe how the “action plan” format can help you stay on top of project work, prioritize support for projects, and communicate progress to the project stakeholders.

Agenda



- Operational work vs Projects
- Project Management Options
- The Action Plan
- Questions

Operational Work vs Projects



- Operational work is the ongoing work to support the business and systems of the organization.
 - These are trouble tickets, right?...
 - Information Technology Infrastructure Library (ITIL)
 - Incident Management
 - Service Request Fulfillment
 - Event Management
 - Change Management
 - Problem Management
 - Access Management
- A project is a temporary endeavor with a beginning and an end that creates a unique product, service, or result.
 - Seems like my department is supporting projects all the time...

Tripler AMC "Operational Work" Portal

For questions about the content on this page please contact LTC McClung at eric.mcclung@us.army.mil.

How to use Remedy

Begin by reviewing the **Instructions for documenting a work order**. Next, review the **Incident Status Definitions and Rules**. These rules will explain how/when to change the Incident (work order) status.

Once you understand the basics of documenting a work order, you can reduce your documentation overhead by creating work order templates IAW the **Remedy Template SOP**.

You can use the ITSM dashboard to graphically review your open and resolved tickets by following the **ITSM Dashboard Setup Instructions**. Once familiar with the ITSM Dashboard, you can use these instructions to configure the dashboard for our **bi-weekly remedy meeting** as well as these instructions for the **Survey Report**. You can pull a **2-week snap shot of your staff** workload with Crystal Reports using these instructions.

If you are having email "notification" overload, you can change your notification preferences by reviewing the **Notifications SOP**.

If you are an "Assigned Group" manager you can manage who shows up in your group for ticket assignment by reviewing **Remedy Group Membership instructions**.

Crystal Reports

[<Click Here>](#) to access Crystal Reports.

System Name: amedusamc202:6400
Username: PRMC
Password: PrptPrim0
Authentication Field select: Enterprise

Remedy Groups (Click Here for full view)

Group Name	Group Owner
Tripler AMC Admin Services	
Tripler AMC CHCS/AHLTA	
Tripler AMC CHCS/AHLTA Accounts	
Tripler AMC CHCS/AHLTA Patient Merges	
Tripler AMC Clinical Systems Training	
Tripler AMC Clinical Workflow Analysis	
Tripler AMC Communications	
Tripler AMC Computer Operations	
Tripler AMC Customer Support	
Tripler AMC Development	
Tripler AMC Essentris HW Tech	
Tripler AMC IA	
Tripler AMC IRMP	
Tripler AMC Loanout Closet	
Tripler AMC Management	
Tripler AMC MHS Patient Merges	
Tripler AMC MHS Systems/Hardware	
Tripler AMC Networking	
Tripler AMC Systems Engineering	
Tripler AMC Systems Support	
Tripler AMC Visual Information	
Tripler AMC Walk-in Support	

Add new item

Web Remedy Console

- Remedy Log-on
- Incident Management
- ITSM Dashboard
- Requestors Console
- Add new link

Links

- TAMC IMD Performance Metrics
- Remedy Workload Reports Archive
- TAMC Remedy Dashboard Filters
- Dashboard Filters Catalog (USAMITC Site)
- Remedy Knowledge Base (Used by ESD to resolve/route tickets)
- USAMITC Remedy TWG Site

Reasons for Remedy

- 1) Improved Internal Communication**
 - Ticket passing/hand-off is visible and documented
 - Current assignee, work info, and status is visible to everyone
- 2) Improved Customer Communication**
 - Customer notified when work is done
 - Questions to customer are documented
 - Customer can provide feedback via survey
 - Customer communication is visible to everyone
- 3) Improved Documentation/Accountability (Examples)**
 - Who is the customer?
 - What's the computer?
 - Who assigned me the ticket?
 - Who is currently working on the ticket?
 - What is the ticket waiting on?
 - Who resolved the ticket?
 - What was done? (work info and resolution)
 - When was it completed and how long did it take?
 - Was there positive/negative feedback from the customer?
- 4) Captures Staff Workload (justifies staffing levels/future growth)**
 - Provides a count of tickets resolved
 - Shows staff time (Level of Effort) required to resolve ticket
 - Shows classification (Operational & Product)

Remedy Guidelines

1 - CREATE THE TICKET

Create the customer's ticket if you are doing the work. If you don't have time to do the work (meaning the customer caught you in the hallway) then direct the customer to submit a request through the ESD.

2 - SET THE STATUS

Set the ticket to the *In-Progress* status when you begin working on the request. The goal is to not have any tickets in an *Assigned* status greater than 7 days.

3 - ENTER WORK INFO

Add a new *Work Info* entry:

- When the ticket is re-assigned to another technician
- When the ticket changes status (i.e. from *Assigned* to *In-Progress*)
- At least every 14 days if it is *In-Progress* or *Pending*

4 - SEND EMAIL VIA REMEDY

Send email correspondence to the customer using the *Work Info* tab. This captures the correspondence in Remedy as well as any responses from the customer. If you correspond via outlook, then document it in the *Work Info* tab.

5 - CAPTURE TIME

Capture your time spent on the ticket through the *Update LOE* (Level of Effort) button on the *Resolution* Tab or the *Update Assignment Log* button on the *Assignment* Tab.

Other Guidance

Tickets with no customer (workload tracking)

You are not currently required to input these, but if you do, then set yourself as the customer.

No response from customer

After attempting to contact the customer 3 times (by phone or email) over the span of 2 weeks you can close the ticket. Track communication attempts in the work-info and 'no response from customer' in the resolution.

Project Management Options



- Mature project management structure includes:
 - Project Management Office w/ dedicated project managers, Project Portfolio
 - Project Charters w/ executive sponsors; Project Scope documentation; detailed project plans (work break-down structures, GANT charts schedules, etc); resource summaries; formal change control
- What can IT shops without dedicated project managers do to track and manage projects?
 - Action plans!

The Action Plan

- The “Action Plan” is a “lite” version of a project template that IT staff can follow to manage assigned project work.

Tripler Army Medical Center > Information Management > Projects > Action Plans > Bldg 160 Renovation - Phase 1
Action Plans: Bldg 160 Renovation - Phase 1

Close	
New Item Edit Item Delete Item Manage Permissions Alert Me Version History	
Title	Bldg 160 Renovation - Phase 1
Objective Statement	<p>Renovation of Bldg 160 to make office space for additional personnel. Facilities Renovation Project will consist of sections of the building designated as Pods 1-5. Phase 1 will be completing the renovation fro Pods 3-5. Phase II will complete Pads 1-2.</p> <p>Tentatively: Pod 2 - MSMO Pod 3 - RM Pod 4 - Managed Care Pod 5 - PRCO</p>
Action Plan Status	In Progress
Governing Driver	(4) TAMC
Assigned To	Jones, Brad D. Mr.
Functional Champion	Smith, John A. COL
Deliverable(s)	<input checked="" type="checkbox"/> Building redesign - facilities <input checked="" type="checkbox"/> Inside Plant (ISP) redesign <input checked="" type="checkbox"/> Outside Plant (OSP) requirements to support new design - (CAPR to NEC for OSP requirements) <input type="checkbox"/> OSP installation <input type="checkbox"/> ISP Installation <input type="checkbox"/> Network Electronics requirements <input type="checkbox"/> Network Eelctronics installation and made operational <input type="checkbox"/> personnel relocation <input type="checkbox"/> Conference room VTC support

Schedule of Events	Underway - Bldg redesign/remodeling space 4/13 - 3 of the 5 sections of Bldg 160 redesign completed 6/13 - Resource Management relocated to Bldg 160 8/8/13 - Start Construction Bldg 160 and 161 9/2/13 - Start 2nd Floor renovation
Start Date	10/21/2013
Revised Due Date	9/30/2014
Original Due Date	4/1/2014
Progress Indicator	+
Progress Category	3 - Green
Stakeholders	TAMC TAMC Facilities TAMC IMD
Risks	Not completing the redesign will delay personnel from relocating from other locations in the hospital and vacating swing space for other projects.
Resources/Partners Required	TAMC Facilities TAMC IMD NEC

Action Plan Components

- **Title:** *This is a short description of the action plan*
- **Objective Statement** – *Enter a brief synopsis of the action plan*

Tripler Army Medical Center > Information Management > Projects > Action Plans > Bldg 160 Renovation - Phase 1

Action Plans: Bldg 160 Renovation - Phase 1

Close

 New Item |
  Edit Item |
  Delete Item |
  Manage Permissions |
 Alert Me |
  Version History

Title	Bldg 160 Renovation - Phase 1
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Action Plan Components (Cont)

- **Action Plan Status** - *This indicates the phase of the action plan*
 - Under Development (Pre-IT Acceptance)
 - Accepted by IT
 - In Progress (Requires a due date)
 - Completed
 - Deferred
 - Disapproved by IT

Action Plan Status

In Progress

Action Plan Components (Cont)

- **Governing Driver** - *Enter the highest level of governing source that is driving this project (not the level of organizational structure that this project touches). Used to categorize the level of command sponsorship.*
 - (1) MHS/DoD/VA
 - (2) Service HQ (Army)
 - (3) Region
 - (4) Medical Treatment Facility

Governing Driver	(4) TAMC
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Action Plan Components (Cont)

- **Assigned To** – *Enter the name of the IT department staff member taking lead on the action plan (this person is responsible for updating the action plan notes on a weekly basis)*
- **Functional Champion** – *Identify the functional champion(s) for the project (typically not the IT Dept staff).*

Assigned To	Jones, Brad D. Mr.
Functional Champion	Smith, John A. COL

Action Plan Components (Cont)

- **Deliverables** – *Provide a list of deliverables/conditions that must be met for this action plan to be closed (Place an “X” in between “()” when the deliverable is completed).*

Deliverable(s)	
	<input checked="" type="checkbox"/> Building redesign - facilities
	<input checked="" type="checkbox"/> Inside Plant (ISP) redesign
	<input checked="" type="checkbox"/> Outside Plant (OSP) requirements to support new design - (CAPR to NEC for OSP requirements)
	<input type="checkbox"/> OSP installation
	<input type="checkbox"/> ISP Installation
	<input type="checkbox"/> Network Electronics requirements
	<input type="checkbox"/> Network Electronics installation and made operational
	<input type="checkbox"/> personnel relocation
	<input type="checkbox"/> Conference room VTC support

Action Plan Components (Cont)

- **Schedule of Events** – *Provide a high-level schedule of events for the project.*
- **Start Date** – *Enter the Action Plan Start Date*
- **Revised Due Date** – *Any changes to the due date will be captured here. Initially, this will be the same as the “Original Due Date”*
- **Original Due Date** – *Enter the Action Plan “Due By” Date*

Schedule of Events	Underway - Bldg redesign/remodeling space 4/13 - 3 of the 5 sections of Bldg 160 redesign completed 6/13 - Resource Management relocated to Bldg 160 8/8/13 - Start Construction Bldg 160 and 161 9/2/13 - Start 2nd Floor renovation
Start Date	10/21/2013
Revised Due Date	9/30/2014
Original Due Date	4/1/2014

Action Plan Components (Cont)

- **Progress Indicator** – *Select the Progress Indicator (used for providing a visual indicator in the SharePoint Dashboard).*



Green - *means action plan is on track to meet revised due date.*



Amber - *means action plan is not going to meet due date and a revised due date has been projected but not approved by sponsor.*



Red - *means action plan is off schedule and a revised due date cannot be reliably determined.*



Park - *means IT is aware of action plan requirements and has completed an initial scoping effort but has no resources to support the plan at the present time - Status is "Under Development-Pre IT Acceptance/Accepted by IT/Deferred."*

- **Progress Category** – *Used for filtering/organization within SharePoint*

Progress Indicator	
Progress Category	3 - Green

Action Plan Components (Cont)

- **Stakeholders** - *List people/departments/functions affected by this action plan*
- **Risks** - *List the known risks associated with this action plan (to include risks of inaction).*
- **Resources/Partners Required** - *List resources required by this action plan (equipment, manpower, etc).*

Stakeholders	TAMC TAMC Facilities TAMC IMD
Risks	Not completing the redesign will delay personnel from relocating from other locations in the hospital and vacating swing space for other projects.
Resources/Partners Required	TAMC Facilities TAMC IMD NEC

Action Plan Components (Cont)



■ Notes – *Enter updates on the action plan status.*

Notes

Jones, Brad D. Mr. (6/2/2014 12:10 PM):
Working on infrastructure install needed to support a 16-18 Jun MCD POD 4 move....approx. 90% completed.

On 29 May, met with JHITS to step through the X160 fiber and copper pull back to the bldg. 160 room 228 comm room. They will perform this action on 23-27 Jun. NOTE: this is needed to support the CG move (next in line).

Jones, Brad D. Mr. (4/21/2014 10:09 AM):
No updates - waiting for the MCD move followed by POD 1B (CG move).

Jones, Brad D. Mr. (3/31/2014 10:47 AM):
PRCO (POD 5) move completed, MCD (POD 4) ready for infrastructure install (May move date), RMD (POD 1) renovation has started.

Where is the CG moving to?

Jones, Brad D. Mr. (2/28/2014 1:20 PM):
UPDATE FROM THE NEC:

CAPR number is HFSSATAMC1402301 and is Titled OSP for TAMC Bldg 160.

I am requesting that JHITS (AT&T) complete all actions within one week. I have also notified them window/dates should be

Action Plan Components (Cont)

- **Project Completion Date** – *List the date the action plan was completed*
- **Schedule Slip (Days)** - *This field calculates the number of days between the "original" due date and the "Revised" due date.
=[Revised Due Date]-[Original Due Date]*
- **Days to Complete** = *This tells you the total # days it took to complete the project [Project Completion Date]-[Start Date]*

Project Completion Date	
Days to Complete	-41,568
Schedule Slip (Days)	182

Action Plan Dashboard



Due Date	Missing Due Date	Green	Amber	Red	Parking Lot	MHS/DoD/VA	MEDCOM/Army	PRMC	TAMC	Development	Med Maint	Facilities	Newly Added
Progress Indicator	Revised Due Date	Title						Assigned To	Modified	Action Plan Status	Governing Driver	Start Date	
Count = 15													
	6/4/2013	ACAV - AMEDD Clinical Application Virtualization						Last, First	6/15/2014 3:51 PM	In Progress	(2) MEDCOM/Army	5/2/2011	
	7/1/2014	MAAG/AVHE						Last, First	6/6/2014 2:03 PM	In Progress	(1) MHS/DoD/VA	10/2/2012	
	9/30/2014	Patient Wireless Network Access						Last, First	6/13/2014 7:01 AM	In Progress	(4) TAMC	3/25/2014	
	10/1/2014	AAFES/BOINGO Installation of a Distributed Antenna System (DAS) within TAMC						Last, First	6/2/2014 12:31 PM	In Progress	(4) TAMC	1/1/2014	
	6/30/2014	Essentris CAG Content Deployment						Last, First	6/13/2014 9:57 AM	In Progress	(1) MHS/DoD/VA	5/2/2013	
	6/30/2014	Philips Pinnacle3 Professional						Last, First	6/13/2014 9:59 AM	In Progress	(4) TAMC	8/1/2013	
	6/30/2014	EDIS FY 15 D8C						Last, First	6/13/2014 9:58 AM	In Progress	(1) MHS/DoD/VA	12/19/2013	
	8/1/2014	CMS -- Washers connect to TDOC/Censitrac						Last, First	6/13/2014 2:35 PM	In Progress	(4) TAMC	6/6/2014	
	8/29/2014	PRMC Pilot deployment of NAC (Forescout)						Last, First	6/13/2014 9:55 AM	In Progress	(2) MEDCOM/Army	11/1/2012	
	9/30/2014	IDES - Phase II - Bldg 339, Ft Shafter - Renovation and Personnel Relocation						Last, First	6/2/2014 12:12 PM	In Progress	(4) TAMC	11/1/2011	
	9/30/2014	Remedy Asset Management and Change Configuration						Last, First	6/13/2014 9:57 AM	In Progress	(4) TAMC	10/1/2012	
	9/30/2014	Bldg 160 Renovation - Phase 1						Last, First	6/2/2014 12:10 PM	In Progress	(4) TAMC	10/21/2013	
	11/28/2014	VET Services Renovations at Bldg 435 FT Shafter						Last, First	6/2/2014 12:14 PM	In Progress	(4) TAMC	3/3/2014	
	5/20/2015	HAIMS Technical Refresh						Last, First	6/2/2014 12:36 PM	In Progress	(1) MHS/DoD/VA	4/1/2014	
	9/30/2016	Full Hospital Nurse-Call Refresh						Last, First	6/2/2014 12:20 PM	In Progress	(2) MEDCOM/Army	10/1/2013	

▢ Add new item

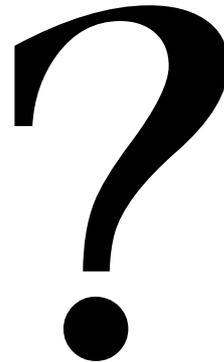
“Parked” Action Plans



Due Date	Missing Due Date	Green	Amber	Red	Parking Lot	MHS/DoD/VA	MEDCOM/Army	PRMC	TAMC	Development	Med Maint	Facilities	Newly Added
Progress Indicator	Revised Due Date	Title				Assigned To	Action Plan Status			Governing Driver	Start Date	Version	
Count = 17													
P		Upgrade to Sharepoint 2010				Last, First	Under Development (Pre-IMD Acceptance)			(3) PRMC	9/1/2011	4.0	
P		ACAV - AHLTA and Clinical Application Virtualization IPT				Last, First	Deferred			(2) MEDCOM/Army	5/2/2011	40.0	
P		PMO Badge and Vehicle Registration Application				Last, First	Deferred			(4) TAMC	6/29/2011	37.0	
P		Enterprise Blood Management System (EBMS)				Last, First	Deferred			(1) MHS/DoD/VA	1/9/2012	15.0	
P		Kyser Projector - Lecturn Connected				Last, First	Under Development (Pre-IMD Acceptance)			(4) TAMC		1.0	
P		Intergrated Security System - Elevator Cameras				Last, First	Under Development (Pre-IMD Acceptance)			(4) TAMC		8.0	
P		Fisher House - Telephone Services				Last, First	Deferred			(4) TAMC	3/26/2012	31.0	
P		Mirth				Last, First	Under Development (Pre-IMD Acceptance)			(1) MHS/DoD/VA	5/30/2012	6.0	
P		Clinical Systems Training & Support PI Project				Last, First	Deferred			(4) TAMC	6/18/2012	15.0	
P		CHCS/AHLTA Account Creation Process				Last, First	Deferred			(4) TAMC	8/21/2012	31.0	
P		Recall/Repurpose unused EUDs and Streamline request process				Last, First	Under Development (Pre-IMD Acceptance)			(4) TAMC	9/4/2012	1.0	
P		CHCS/AHLTA Patient Duplicates/Merges				Last, First	Deferred			(4) TAMC	10/12/2012	34.0	
P		CHCS Training-Phase 2				Last, First	Deferred			(1) MHS/DoD/VA	12/10/2012	8.0	
P		Soldier Centered Medical Home (SCMH) IT requirements				Last, First	Deferred			(2) MEDCOM/Army	4/15/2013	5.0	
P		Decreasing LOS				Last, First	Deferred			(4) TAMC	7/3/2013	13.0	
P		Win 2008 R2 upgrade to Reporting Services servers				Last, First	Under Development (Pre-IMD Acceptance)			(1) MHS/DoD/VA		9.0	
P		Migrate NAS data off old disks.				Last, First	Under Development (Pre-IMD Acceptance)			(4) TAMC		3.0	

⊞ Add new item

Questions



“Medically Ready Force...Ready Medical Force”

Please complete your evaluations

Contact Information



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This is Your DHA



Thank You For All Your Efforts!

