HealthFirst Care Scope Management Plan and Work Breakdown Structure

Capstone Project M02L02

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Scope statement

The project will define and validate a controlled operational pilot for appointment scheduling, patient communication, check-in, handoffs, resource visibility and reporting. The intended outcome is evidence for a scale, revise, pause or rollback decision. The work does not include clinical decision automation or full hospital-platform replacement.

Objectives inclusions and exclusions

Area	Definition	Acceptance evidence
Objectives	Reduce scheduling conflict and delay, improve communication and make operational status traceable	Sponsor-approved measures and UAT evidence
Inclusions	Requirements, stakeholder engagement, process models, data analysis, dashboard, risk controls, pilot preparation	Artifacts mapped in the project index
Exclusions	Clinical decisions, major construction, permanent staffing, full billing/lab/EMR replacement	Change log confirms no unapproved expansion

Assumptions dependencies and constraints

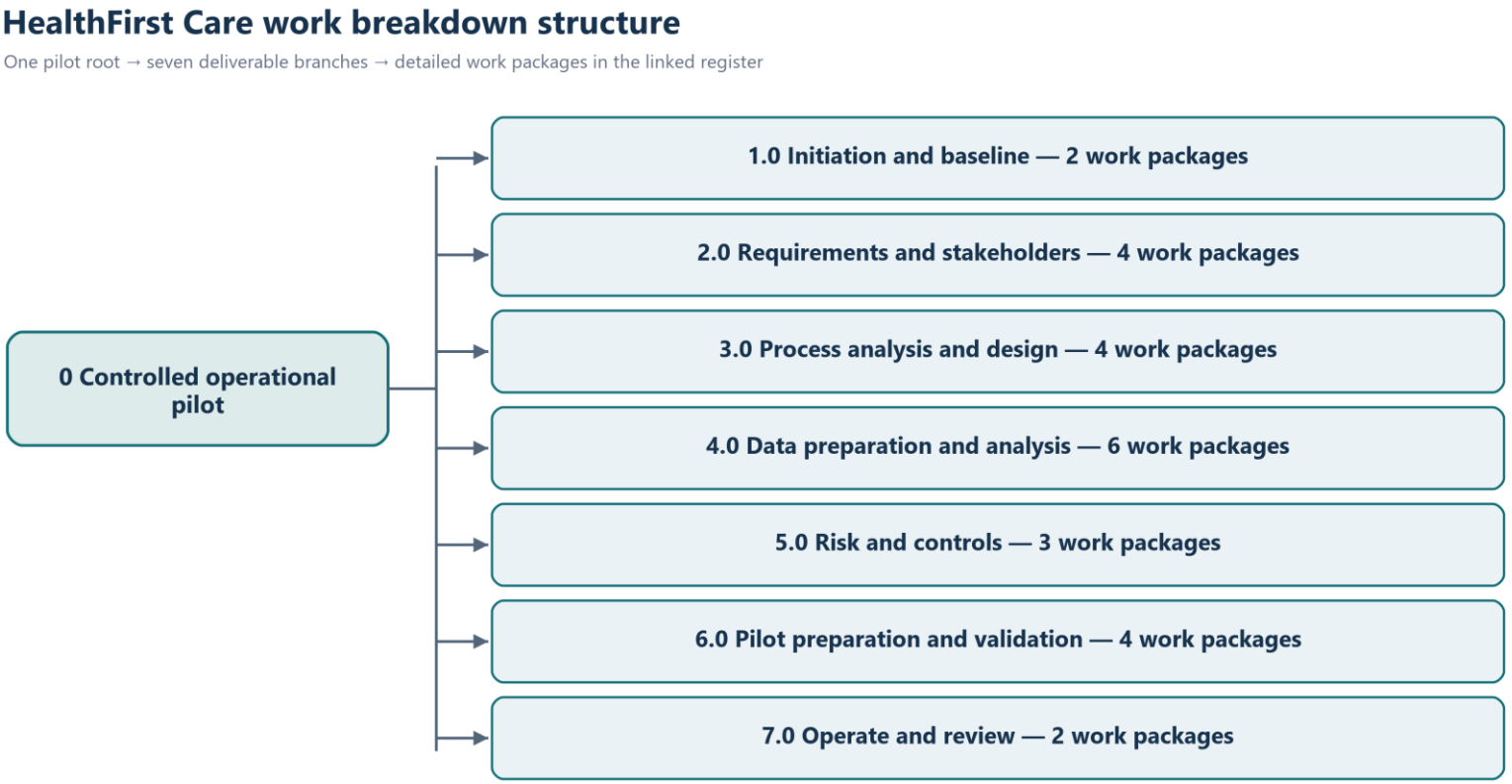
Type	Item	Control
Assumption	Operational owners are available for design and validation	Record review attendance and unresolved decisions
Assumption	Source extracts can be refreshed during a pilot	Define owner, frequency and freshness warning
Dependency	Legacy scheduling, patient-record and notification interfaces	Complete mapping and reconciliation before release

Type	Item	Control
Constraint	Privacy, accessibility and clinical continuity remain mandatory	Treat as release gates
Constraint	No approved budget, dates or staffing plan were supplied	Use sequence and role ownership without invented commitments

Deliverables and acceptance

Deliverable	Acceptance criterion	Responsible reviewer
BRD and RTM	Requirements trace to source, objective, planned validation and open status	Sponsor, business analyst and owners
Stakeholder plan	All supplied profiles represented and engagement routes defined	Project sponsor and functional leads
Process models	As-Is and To-Be flows show decisions, exceptions and ownership	Operational and clinical leads
Analytical workbook and dashboard	Controls reconcile, pivots refresh and missing data are visible	Data owner and operations
Risk and mitigation plans	High risks have owner, trigger, prevention, contingency and review cadence	Risk owners and sponsor

Hierarchical WBS



The pilot root decomposes into seven deliverable branches. The full work-package register follows; each branch also has its own editable diagram.

The seven detailed branch diagrams are supplied in HealthFirst_Editable_Diagrams as wbs_branch_1.svg through wbs_branch_7.svg, with matching PNG previews. Each branch expands its phase into work packages and review milestones.

WBS	Work package	Owner	Dependency	Milestone or output
1.0	Initiation and baseline	Project sponsor	—	Project charter and decision rights
1.1	Confirm problem statement and intended outcomes	Business analyst	1.0	Problem statement reviewed
1.2	Confirm governance, roles and decision routes	Project manager	1.0	Governance baseline
2.0	Requirements and stakeholders	Business analyst	1.0	Requirements baseline

WBS	Work package	Owner	Dependency	Milestone or output
2.1	Review profiles and operational datasets	Business analyst	1.1	Evidence inventory
2.2	Document BRD and open questions	Business analyst	2.1	BRD review
2.3	Build and reconcile RTM	Business analyst	2.2	RTM review
2.4	Complete stakeholder analysis and engagement plan	Business analyst	2.1	Engagement plan review
3.0	Process analysis and design	Business analyst	2.0	Workflow design baseline
3.1	Model appointment As-Is and To-Be	Business analyst; scheduling	2.3	Workflow review
3.2	Model check-in As-Is and To-Be	Business analyst; front desk	2.3	Workflow review
3.3	Model interdepartmental communication	Business analyst; IT	2.3	Workflow review
3.4	Build appointment, check-in and discharge swimlanes	Business analyst; clinical leads	3.1–3.3	Role/handoff review
4.0	Data preparation and analysis	Data analyst	2.1	Analysis baseline
4.1	Preserve and profile raw sources	Data analyst	2.1	Source control totals
4.2	Clean duplicates, dates, missing values and categories	Data analyst	4.1	Clean datasets
4.3	Validate keys, joins, cardinality and unmatched rows	Data analyst	4.2	Quality log
4.4	Build patient feedback summary and appointment lookup	Data analyst	4.3	Combined analysis
4.5	Create native PivotTables, charts and slicers	Data analyst	4.4	Analytical workbook
4.6	Build and validate dashboard	Data analyst; operations	4.5	Dashboard review
5.0	Risk and controls	Business analyst; risk owners	2.0–4.0	Risk baseline
5.1	Create risk register and SWOT	Business analyst	3.0;4.0	Risk review
5.2	Prioritize risks and define mitigation	Risk owners	5.1	Mitigation review
5.3	Define contingencies, triggers and monitoring	Risk owners	5.2	Continuity review

WBS	Work package	Owner	Dependency	Milestone or output
6.0	Pilot preparation and validation	Project team	3.0–5.0	Go/no-go evidence
6.1	Configure pilot workflows and controls	IT; operations	3.0;5.0	Pilot ready
6.2	Prepare role-based training and support	Change lead	6.1	Training ready
6.3	Execute planned UAT and reconcile RTM	UAT lead; stakeholders	6.1	UAT decision
6.4	Review security, downtime and data-quality gates	IT; security; data owner	6.1	Control decision
7.0	Operate and review	Operations; sponsor	6.0	Pilot review
7.1	Monitor agreed KPIs, adoption, exceptions and risks	Operations; data owner	6.3	30-day review
7.2	Decide scale, revise, pause or rollback	Sponsor; governance group	7.1	Decision recorded

Open the standalone, editable WBS register

Scope validation and change control

- Submit a change request with rationale, affected requirements and requested timing.
- Assess impact on objective, data, workflow, security, continuity, dependency, effort and risk.
- Business analyst recommends approve, reject or defer. Sponsor or delegated governance group decides.
- If approved, update the BRD, RTM, WBS, risk register, acceptance evidence and communication plan.
- Emergency patient-safety or security changes use expedited governance and receive retrospective review.

Monitoring

The project manager tracks WBS outputs and unresolved decisions. The business analyst reconciles scope against the BRD and RTM at each gate. A deliverable is accepted only when the named reviewer records a decision; draft completion is not approval.