

# **VHA Office of Integrated Veteran Care**

## **IHPM Project Management**

### **Standard Operating Procedure**



**September 19, 2022**

**Version History**

Version	Date	Version Description
1.0	07/19/2022	First Draft by Serita Rogers
2.0	07/22/2022	Incorporated PMD Portfolio Managers input
3.0	09/19/2022	Incorporated HOC Briefing Routing Information

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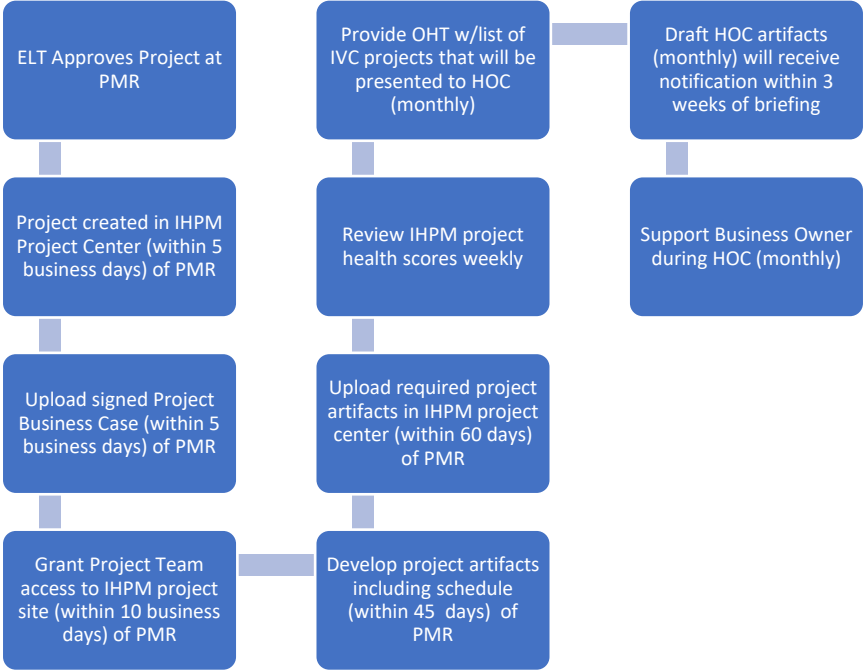
## 1. Introduction

The purpose of this document is to provide a detailed Standard Operating Procedure for the Integrated Healthcare Portfolio Management (IHPM) project initiation, artifact upload and Healthcare Operations Center (HOC) briefings process flow.

## 2. Roles and Responsibilities

Role	Responsibility
PMD Deputy Director	<ul style="list-style-type: none"> <li>• Export Reports from IHPM Project Center and Review IVC Projects Health Scores w/PMD Leadership</li> <li>• Collaborate with OHT Leadership to establish open lines of communication to ensure that IHPM project center expectations are met</li> <li>• Train staff and document the IHPM process</li> </ul>
Portfolio Manager	<ul style="list-style-type: none"> <li>• Populate the Project Business Case (PBC) using new PIE intake form submission data and route for signature</li> <li>• Create new project in the IHPM project center</li> <li>• Quality review and Upload required project artifacts into the IHPM project center</li> <li>• Grant access to IHPM project site</li> <li>• Support the Business Owner at the Healthcare Operations Center (HOC) monthly</li> </ul>
Project Manager / IPT	<ul style="list-style-type: none"> <li>• Draft and finalize all required IHPM project artifacts</li> <li>• Upload all IHPM project artifacts in OSS</li> <li>• Notify Portfolio Manager of changes required for IHPM project site</li> <li>• Meet with schedulers to update the project schedule weekly so that IHPM project aligns with the project schedule</li> </ul>
Office of Healthcare Transformation (OHT)	<ul style="list-style-type: none"> <li>• Route the PBC to the functional review groups</li> <li>• Notify and Schedule meeting w/ Portfolio Manager to discuss PBC</li> </ul>
Scheduler Contract Resources	<ul style="list-style-type: none"> <li>• Develop project schedules</li> <li>• Update project schedules weekly in IHPM project center</li> </ul>
OHT Help Desk Personnel	<ul style="list-style-type: none"> <li>• Resolve permission issues in IHPM project center</li> <li>• Resolve updates to assignments in the IHPM</li> </ul>

**3. Timelines:**



**4. Process**

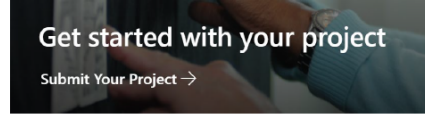
Procedures
<p><b>Create project in IHPM project center</b></p> <p>1) Portfolio Manager will follow the below instructions for creating a new project in the IHPM project center (once the ELT has approved the project at PMR) within 5 business days</p> <p><b>Page 9 – 10</b></p> <div style="display: flex; align-items: center; margin-top: 10px;"> <p style="font-size: small;">IHPM_and_VHA_Projects_User-Guide.pdf</p> </div>

On VHA Project Portal home page  
([VHA Project Portal \(sharepoint.com\)](https://vha-project-portal.sharepoint.com))



Get started with your project

Submit Your Project →



Enter basic project information and attach  
source documentation authorizing the project  
([Project Intake \(sharepoint.com\)](https://project-intake.sharepoint.com))

Receive an email with a link to project site and further instructions



## Project Business Case (PBC)

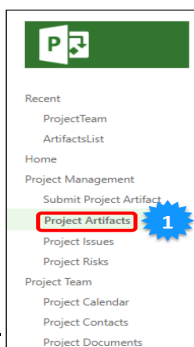
2) Portfolio Manager will populate the attached PBC with four required fields below captured in PIE submission and route to Business Owner for signature

- Executive Summary
- Problem and Impact
- Recommendation
- Alignment with Strategic Priority



TEMPLATE\_Project  
Business Case.pdf

3) Once signed upload into IHPM project center site - [Link](#)

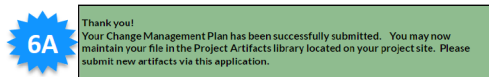


### Instructions

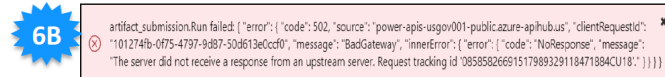
1. On the left-hand navigation, click on **Submit Project Artifact** and a pop-up window will open titled **Project Artifact Submission**.
2. Type the Project under **Project Name** or click on the drop-down menu to see all project names.
3. Choose the **Artifact Type** from the drop-down menu.
4. Click the paper clip to upload the project artifact.
5. Click **Submit Artifact**.

After clicking submit:

- a. A confirmation will appear on the page confirming the submission was successful.



- b. An error message will appear at the top of the page if the submission was not successful.



## Grant IPT access to Project Site

- 4) The Portfolio Manager will follow the instructions below to grant IPT with access to project site



How to Share Your Project Site.pptx

## Upload Required IHPM project artifacts

- 5) The Project Manager should create required project artifacts identified below and work with schedulers to develop project schedule within 30 days of project initiation and upload in [OSS](#)

▼ IHPM Artifacts

Artifact Type ▲	Date Draft Uploaded ⇅	Date Final Version Uploaded ⇅
Change Management Plan	4/7/2022 8:38:04 AM	4/7/2022 8:38:05 AM
Closeout Plan	4/1/2022 9:10:38 AM	
Communications Plan	4/6/2022 3:17:43 PM	
PMP	3/20/2022 8:56:00 AM	3/24/2022 8:56:35 AM
Project Business Case	4/1/2022 9:08:36 AM	4/1/2022 9:08:36 AM
Project Charter	3/28/2022 9:16:32 AM	4/6/2022 3:06:28 PM
Transition Plan	4/1/2022 9:10:33 AM	

[Add New](#)

**Templates**

- [PMP](#)
- [Project Charter](#)
- [Project Business Case](#)
- [Change Management Plan](#)
- [Communications Plan](#)
- [Transition Plan](#)
- [Closeout Plan](#)
- [IHPM PM Checklist](#)

[Hide](#)

Upload Artifact Documentation:  No file chosen

Artifact Type:  ▼

Artifact State:  ▼

### Upload project artifacts in IHPM project site

Follow the same instructions listed in **number #3** (above)

### Healthcare Operations Center (HOC) Briefings

- 6) The Portfolio Manager can expect the HOC to get this email out to the business owner and project team at least 3 weeks ahead of presentation date. Presentations are due the Wednesday prior to Monday’s HOC call.
- 7) PMD’s HOC approved briefings are [located here](#).

### Sample HOC Email

Hello,

*The Healthcare Operations Center (HOC) has selected your IHPM project, [Project Name], to be presented during the HOC Daily Leadership Briefing on [Date]. Your project was selected based on [Criteria].*

*The HOC Daily Leadership Briefing facilitates leadership decision-making through presentation of up-to-date, accurate, and meaningful information regarding VHA operations across the enterprise. The IHPM project briefings specifically are for awareness by the leaders, especially on any potential requests or impacts to the enterprise, not just VHA. These briefings also give the project team the opportunity to give a high level overview of the accomplishments and*

upcoming milestones of the IHPM project. Attendees in this HOC presentation will include; USH, DUSH, AUSHs, Chief Officers, NDs (and some of their Network Staff).

You and those from your team copied on this email will receive an Outlook invite. Do not forward the invitation. Send the names of any others you would like to include in the invite to [vha15hohealthcareopsctraction@va.gov](mailto:vha15hohealthcareopsctraction@va.gov) and Cc: [VHAProjects@va.gov](mailto:VHAProjects@va.gov).

Use the attached briefing template to build your presentation and submit to the HOC by [Date]. Teams are allocated 15-30 minutes for presentation/questions.

If you have any questions about the briefing template content, please contact the IHPM team at [VHAProjects@va.gov](mailto:VHAProjects@va.gov).

- 8) The Project Manager will develop the content for the HOC Briefing template using the PMD HOC briefing calendar in [this location](#).



IHPM HOC  
Presentation Final Ter

- 9) The Project Manager will route to Portfolio Manager to review and provide the initial input to ensure that clear expectations are set.
- 10) The Portfolio Manager will have the Project Manager schedule a review meeting with PMD Director/Deputy to review and incorporate all feedback.
- 11) The Portfolio Manager will have the Project Manager schedule a review meeting with Executive Director that will be briefing the slide deck and incorporate all feedback.
- 12) The Project Manager will forward the HOC briefing to EO Executive Director and IVC SES for input and review. Send email to: Carter, Craig H [Craig.Carter3@va.gov](mailto:Craig.Carter3@va.gov); Sandbothe, Jillian [Jillian.Sandbothe@va.gov](mailto:Jillian.Sandbothe@va.gov); Mehta, Paril A. [Paril.Mehta@va.gov](mailto:Paril.Mehta@va.gov)
- 13) The Project Manager will forward the finalized HOC briefing to: VHA 15HOC Healthcare Ops Ctr Action [VHA15HOCHealthcareOpsCtrAction@va.gov](mailto:VHA15HOCHealthcareOpsCtrAction@va.gov); Scruggs, Josefina M. (she/her/hers) [Josefina.Scruggs@va.gov](mailto:Josefina.Scruggs@va.gov); cc: Executive Director, Portfolio Manager, PMD Director/Deputy. The Pfm will include in the participants list the presenter if different than ED, ED, Pfm, PMD Director/Deputy in the body of the email.

Example below:

I am submitting the attached slides for the September 19<sup>th</sup> Consult Toolbox (CTB)



presentation on the HOC Daily Leadership Briefing.

Please ensure to include the attendees listed below to include myself on the invite for the call:

- Dr. Sachin Yende
- Dr. Aashna Basu
- Dr. Lisa M. Arfons
- Nancy Brown
- Katheryn Benjamin
- Adrienne Clark
- Laurie Osborne
- Kathy MacDonald
- Jakki May
- Serita Rogers

### **Ongoing Maintenance / Closeout**

14) The Portfolio Manager will monitor project health score and ensure that timely updates are made to artifacts

15) Coordinate with [OHT Helpdesk](#) to resolve all permission issues and assignment changes

16) After IVC Go/No Vote, contact OHT personnel to close out the project (Laura Peil, Josie Scruggs and/or Cameron Cotton)