

CLIENT LETTER & DRAFT BEP

ACBA 5010

Abstract

The following documents seek to comprehend and apply the functions and processes needed to manage the life cycle of a built structure in a Building Information Modelling environment.

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1.0 CLIENT LETTER



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27th March 2022

Dear Swansea West School Governor Harries,

Firstly, I'd like to take this opportunity to thank you and your team for our involvement in this exciting scheme. 'Ysgol Bae Abertawe' certainly is a scheme that we are well geared up to deliver.

In response to your request for further information regarding the companies' abilities with achieving the BIM maturity levels the project requires, please find further details below.

Building Information Modelling (BIM) is the process for creating and managing information on a construction project throughout its whole life cycle. As part of this process, a coordinated digital description of every aspect of the built asset is developed, using a set of appropriate technology. It is likely that this digital description includes a combination of information-rich 3D models and associated structured data such as product, execution and handover information. (Hamil and Sharman, 2022)

Level 2 BIM, and subsequently the UK BIM framework based on international standards BS EN ISO 19650 Parts 1 and 2 are distinguished by collaborative working, and requires "an information exchange process which is specific to that project and coordinated between various systems and project participants" (McPartland and Sharman, 2022)

In the first instance, we would review the client's EIR (Employer's Information Requirements) submission, in order to determine the scope of the project and associated details. The core purpose of an EIR is for the client to document the key information requirements and to establish the information **management** requirements. This document forms the basis from which we can then respond with their outline BIM Execution Plan (BEP). We await the submission of the EIR from your client team.

Once we are satisfied that we have all relevant information, we can carry out the BIM Execution Plan. A BIM Execution Plan (BEP), is a comprehensive document that helps project participants move forward with clear roles and expectations. A BEP is an essential element to create before beginning any construction project, especially for those that are large or complex with many collaborators. (Ramage, 2022) The development of such a plan, for facilitating the management of information on a BIM project, is set out in the series of standards, PAS 1192-2:2013 & subsequently the series of international standards, BS EN ISO 19650 Parts 1 and 2, where it is defined as a "plan prepared by the suppliers to explain how the information modelling aspects of a project will be carried out". (Shillcock, 2019)

More specifically, the BEP will explain the methods used to design the project. This will involve detailing the design software used and the capabilities and benefits they carry. It will also set out technical terminology and explain what certain terms and 'jargon' means. What it will also seek to achieve, is to set out the structure of the management involved with organising the flow of data. The use of a CDE (Common Data Environment), is a powerful tool that is used to create a forum where all parties are able to easily review and interact with the information/data that is being produced. This encourages collaboration and makes the experience document control between the parties far more efficient. The CDE is defined in ISO 19650 Part 1 as a 'combination of technical solutions and process workflows.' Generally, the CDE solution is a software or online tool that facilitates the management and exchange of information in BIM projects. (McPartland and Sharman, 2022)

The CDE is broken down into sections as detailed below:

- 1. WIP (Work in progress) – This is used to store unprocessed information and data. Once the information has been approved, it will then move into the 2nd phase

- Section 2. Shared – This section allows dependent members of the design team to view the approved information. This allows specific people to make a start on the design work which can then be approved and moved onto the next phase
- Section 3. Published – This section includes information that will be shared amongst the whole project team. At this part, all work should be accurate and validated as it will be the information construction will follow during the project
- Section 4. Archive – This section allows all project members to access all information relating to the entire project. This will include information such as orders and transactions (Task: Overview of the Common Data Environment (CDE) - BIM Level 2 Guidance, 2022)

Since there is the potential for many parties and personnel being involved with the project, sensitive data handling is of the utmost importance. This is dependent on what the client team sets out in the EIR. Once we have the specifics of the nature of the body of sensitive material, we will be able to set out the protocols to be assigned to the project. This is to be in line with PAS 1192-5.

As well as the aforementioned, this will be combined with principal designer role responsibilities. These will include:

- Plan, manage, monitor and coordinate health and safety in the pre-construction phase.
- Provide the information designers and contractors need to carry out their duties.
- Work with any other designers on the project to eliminate foreseeable health and safety risks to anyone affected by the work and, where that is not possible, take steps to reduce or control those risks.
- Ensure that everyone involved in the pre-construction phase communicates and cooperates, coordinating their work wherever required.
- Liaise with the principal contractor, keeping them informed of any risks that need to be controlled during the construction phase. (Construction - Principal designers: roles and responsibilities CDM 2015, 2015)

To follow is the BIM Execution Plan. Could the relevant parties please review and come back to us with a response as soon as possible, so that we may progress the project without potential for delays.

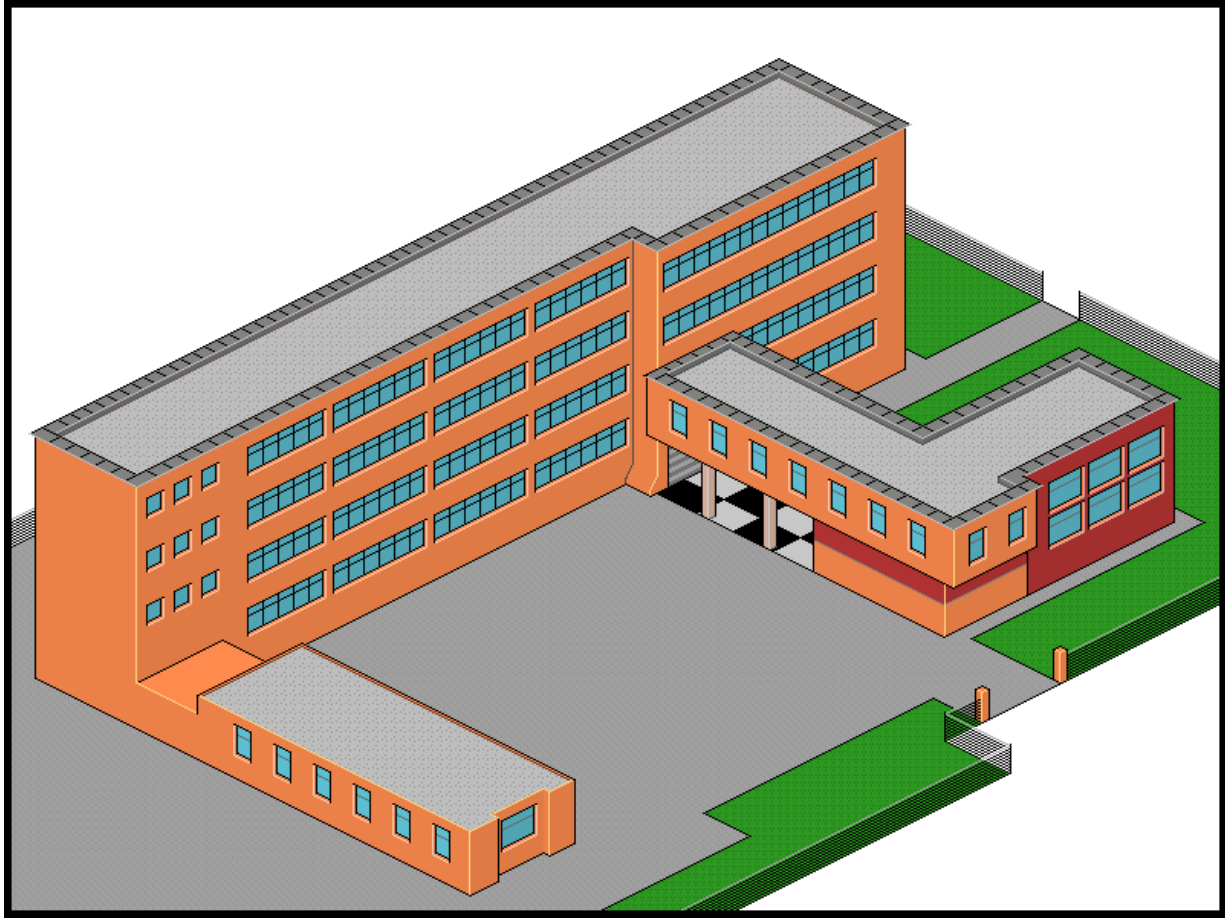
We hope this has satisfied your requirement for further information with regards to the BIM maturity levels on the scheme and how we plan to implement the necessary processes and protocols.

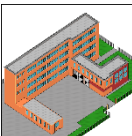
Should you or any member of your team require further information, please do not hesitate to get in touch via the email stated at the beginning of the letter.

Kind regards,

Daniel Collier

Ysgol Bae Abertawe
5010



	<u>DOG & WOLF</u> <u>DESIGN LTD</u> 	Project Ysgol Bae Abertawe		Title BIM Execution Plan				
		Document Type Specification		File name 5010-YBA-XX-XX-SP-Z-00001				
		Revision P01	Status S1	Date of Issue 2022-03-28	Scale NTS	Created DC	Checked DC	Approved DC

PAS 1192-2 is the Specification for information management for the capital/delivery phase of construction projects using building information modelling. It is sponsored by the Construction Industry Council (CIC) and published by The British Standards Institution. The following document has been prepared using the guidance set out in the PAS 1192-2.

Information highlighted in **RED** is provided for guidance

Status	Notes	Date
DRFT.1A	Initial plan drafted to suit early brief	05/01/2022
DRFT.1B	Rearranged to suit further consultation	09/01/2022
DRFT.1C	Amended to ensure compliance with legislation and guidelines	04/03/2022
P01	Appropriate titling and project specific info updated	28/03/2022

2.0 EIR RESPONSE

The following BIM Execution Plan (BEP) has been created to reflect the Employer's requirements received from Swansea County Council:

Project	Status
5010-YBA-XX-XX-SP-Z-00001	P01

The following documentation has been carried out as a direct response to the employer's requirements brief. In order to make the document compliant with the guidance, the following has been prepared in conjunction with PAS 1192-2 7.2.1 documentation

EIR	Deliverables	DOC
1.0	Acquire all necessary requirements from client brief and project info	1.0
2.1	Produce Table outlining Model Production	NA
2.2	Outline accessibility and any further information needed to interact with documentation	2.2
2.3	Ensure BEP is compliant subject to documentation provided with section 3.5	3.0
2.3	Produce plan outlining Master information Delivery	Appendix B
2.3	Coordination procedures to be produced and agreed	3.2

2.3	Ensure all team requirements are taken into account and fed through to CDE/Model (Checklist)	4..0
2.4	Clash detection plan and protocol to be outlined	4.2
2.5	Collaboration plan to detailed ensuring compliance with the necessary Standards (BS 1192)	4.4
2.7	Detail the process regarding handling and safeguarding of private and sensitive information	5.0
2.8	Provide all necessary outcome information regarding the building/property	5.2
2.9	Produce info that is measurable against section 2.9	6.0
2.10	Outline suitability of appointed personnel with involvement	Appendix C
2.11	Provide supporting values and information specific to each document communication objective	5.2
2.12	Ensure data communication is compliant with section 2.12	2.3
3.1	Info/Data Exchange to be compliant with Appendix B PLQs	4.2
3.2	Detail strategic purpose requirements and subsequent compliance	4.0
3.4	Provide detail of necessary personnel roles and expectancies	2.1
3.5	Provide indication of all guidance and related compliance requirements	6.0
3.6	Provide responsibilities to achieve compliance with PAS 1192-2	5.7

Table 1 – Proposals register in response to EIR

3.0 PROJECT INFORMATION

The following information will be set out to comply in response to the above proposals register.

Project Name:	Ysgol Bae Abertawe
Project Number:	5010
Project Description:	1 form entry infant school for 90 pupils, with 48 PT Nursery provision.
Site Name:	Ty Crempog
Site Description:	<u>Sensitive Information *Archived*</u>
Facility Name:	Ysgol Bae Abertawe
Facility Description:	<u>Sensitive Information *Archived*</u>

Table 2 - Project Information

3.1 MANAGEMENT & GUIDANCE

The following information seeks to satisfy all requirements to ensure compliance with the necessary government guidelines (PAS 1192-2, 7.2.1a)

3.2 RELEVANT PARTIES & FUNCTIONS

The following sets out the specific parties involved in the process and the expected output from each

Name	Company	Role	Contact Information
Ysgol Bae Abertawe	Swansea Council	Client	Sensitive Information *Archived*
Dan Collier	Dog & Wolf Design Ltd	Architectural	Sensitive Information *Archived*
Ross Jones	Auxilium Ltd	M&E	Sensitive Information *Archived*
Jake Simm	SMK Ltd	M&E	Sensitive Information *Archived*

Table 3 - Project Contacts

The following **Employer's Representative** responsibilities apply to each individual as follows:

Remit	Party
Relay relevant information curtailing to key points of consideration	Client
Provide areas for clarification	Client
Ensure compliance with correct standards	Client/Architect
Provide management of all relevant information	Architect
Manage information exchanged between internal & external parties to ensure compliance	Client/Architect

Table 4 - Employer's Representative Responsibilities

Management Responsibilities

Management responsibilities are set out and to be maintained as per the following. Unless an update is issued by Dog & Wolf Ltd, the below will take precedence.

Remit	Party
Provide appropriate CDE forum to ensure project data is captured by all	Architect
Manage flow of data into CDE	Architect
Adapt relevant data to comply with project deliverables	Architect
Manage and maintain information exchange	Architect
Review, assess and manage data flows	Architect

Table 5 - Project Information Manager Responsibilities

Project Delivery

Remit	Party
Maintain & manage all relevant data flows	Architect
Authenticate parties' capabilities for delivering required information	Architect

Table 6 - Project Delivery Manager Responsibilities

Individual party responsibilities are set out below:

Remit	Party
Manage & quality control of all project data submitted to CDE	Architect
Manage design process information for submission	Architect
Provide relevant information ensuring compliance with brief	Architect
Confirm responsibility for configuration management	Architect
Quality control of documentation for approval and publish	Architect
Capture change and manage clashes	Architect

Table 7 - Lead Designer/Contractor Responsibilities

Respective Team responsibilities are set out and to be maintained as per the following. Unless an update is issued by Dog & Wolf Ltd, the below will take precedence.

Remit	Party
Respective team to provide designs specific to individual requirement	Architect/M&E
Manage document control	Architect
Individual party to manage production of data in line with SMP	Architect/M&E
Oversee/Manage design deliverables – agreed format compliant	Architect/M&E
Review info/data to ensure suitability before release	Architect/M&E
Ensure real world considerations are captured and tasked	Architect/M&E
Resolution management with regard to any overlaps in information	Architect/M&E
Ensure own remit covered in entirety	Architect/M&E
Scheme deliverables to be produced	Architect/M&E

Table 8 - Task Team Responsibilities

3.3 MAJOR PROJECT MILESTONES

The below section sets out key milestones across the scheme.

Milestones for the project are available for review as part of the BEP execution programme annexed at the end of the document.

3.4 PIM DELIVERABLE STRATEGY

The following section will seek to set out the objectives to be presented at the key milestones across the project.

Following review of the exchange of information requirements outlined within **EIR section 3.1**, scheduled below are the deliverables that will be exchanged at each major project

milestone. Please note that additional item has been included (shown in red) to satisfy the Client's Strategic Purposes outlined within **EIR section 3.2**.

In relation to the Employer's requirements received, the following objectives are planned for key milestones across the scheme. The following has been produced for compliance but has also been adapted to suit the individual requirements of the EIR.

	Production Material	Target Outputs
Information Modelling		Native Discipline Models Federated IFC Model
Relevant Data		Federated COBie
Format Presentation	BIM Execution Plan	Site Plans, Floor Plans, Elevations, Sections, Door Schedule, Window Schedule

Table 9 - PIM Deliverable Strategy

3.5 SURVEY STRATEGY

The following section seeks to set out the processes and protocols surrounding project data exchange.

Project surveys will be compliant with key information set out in section 5.2. Units of measurement and project tolerances will be compliant with key information set out in section 5.6. All above information will be attainable to and interactable within manufacturing software.

Below is a register of surveys programmed for the project:

Type	Doc Format	Additional Information
Topo Survey	DWG	Layers to Comply with BS 1192 & Uniclass 2015

Table 10 - Survey Strategy

3.6 EXISTING LEGACY DATA

The following section sets out existing project data.

As a result of the review of information that was provided by the client team, existing data that is relevant to the project has been integrated into the models. The schedule of information is annexed at the end of the doc.

3.7 APPROVAL OF INFORMATION

The following section sets out the processes and protocols with screening information for issue.

Any and all parties involved in issuing official contract documents to be submitted as part of the BEP will need to ensure the following:

1. Ensure compliance of all issued documentation with SMPs – section 5
2. Ensure project mapping and all associated measured docs are accurate
3. Check for potential existing data to be taken into consideration
4. Provide author details
5. Assess against key objectives
6. Provide revision codes as processed
7. Ensure submission to CDE

Should the above steps not be adhered to, the submission of documentation will be rejected and key management figures will be notified. A review will need to be carried out and submission will need to be resubmitted.

3.8 PIM AUTHORIZATION PROCESS

The following section seeks to set out processes and protocols regarding the intake of project information.

It is assumed that the person responsible for the review of supplier information will undertake the following steps prior to authorization:

The following process is to be carried out as part of personnel responsibility assigned regarding assessment of external party information:

1. Review capability to assess key objectives regarding IT constraints
2. Ensure key objective has been produced using information from Exchange information table
3. Evaluate effectiveness of material against Client Strategic Purposes
4. Provide revision codes as processed
5. Ensure submission to CDE

Time constraints when reviewing issue of data/information are limited to 5 working days. This is to ensure that no delays are produced.

4.0 PLANNING AND DOCUMENTING

The following section seeks to set out the processes and protocols surrounding the planning and documenting of information and data during the process, in accordance with PAS 1192-2, 7.2.1b.

Documentation is to be submitted to the nominated CDE once approved. All parties will be given access to the CDE on order to keep up to date with the process.

4.1 PROJECT IMPLEMENTATION PLAN

The following section seeks to review and assess that the capability of the supply chain has been evaluated and approved as fit for purpose.

There has currently been no other appointments to the project.

Therefore the requirement for the project implementation plan is null and void.

4.2 AGREED PROCESSES FOR COLLABORATION & INFORMATION MODELLING

The following section seeks to set out processes and protocols regarding collaboration and information exchange when considering information modelling

Directly related to the employer's requirements, relevant information is produced in line with necessary data as stated in section 5.9. The responsibility matrix will dictate the LOD/LOI for each element of the documentation.

Project objective target documents are to be developed in accordance with the programme (MIDP) as annexed at the end of this document. All to be formatted as set out in sections 6.1/.2.

The programme for development of information has been formatted to minimize the risk of clash. This mitigates the need for a clash avoidance strategy.

Being that I am acting as all parties on the scheme, the need for formal exchange of information is omitted. With regards to this, the use of an actual CDE will be omitted.

Models and Deliverables will be placed onto a designated GoogleDrive folder to the viewing, access, and authorisation of information.

All information and data, both graphical and non-graphical will be stored on a cloud drive for access.

In order to adhere to compliance with section 2.7 of the employer's requirements, Furniture, Fittings & Equipment models and their associated data will not be included in the scheme.

Following subsequent review of section 2.2 training requirements have been omitted from the key objectives.

4.3 TASK INFORMATION DELIVERY PLAN

The following section confirms the inclusion of Task Information Delivery Plans.

Task information Delivery Plans are available upon request, however, due to the nature of the project, will not be submitted as part of the main body of work.

4.4 MASTER INFORMATION DELIVERY PLAN

The following section seeks to set out the Master Information Delivery Plan.

For compliance with the employer's requirements section 2.3, a Master Information Delivery Plan has been provided. See appendix B

The plan was produced following a companywide review involving all participants in order to minimize confusion and promote collaboration.

5.0 STANDARDS, METHODS, AND PROCEDURES

The following section specifically caters to the requirements of PAS 1192-2, 7.2.1 c.

In relation the employer's requirements, specifically section 3.5, the necessary British standards are noted in section 5 of this documentation.

5.1 VOLUME STRATEGY

The following section seeks to set out and confirm any requirement for geometric specification over and above basic requirements.

With reference to the size of the project, the need for a volume strategy has been mitigated. Key objective documents will be coded accordingly.

5.2 PIM ORIGIN AND ORIENTATION

The following section seeks to set out the project specific coordination.

Sensitivity of personal data has been protected under the employer's requirements as set out in section 2.7. Therefore gridlines will be omitted from this part of the BEP. The local project base point will be the south corner of the main building as indicated in the diagram.

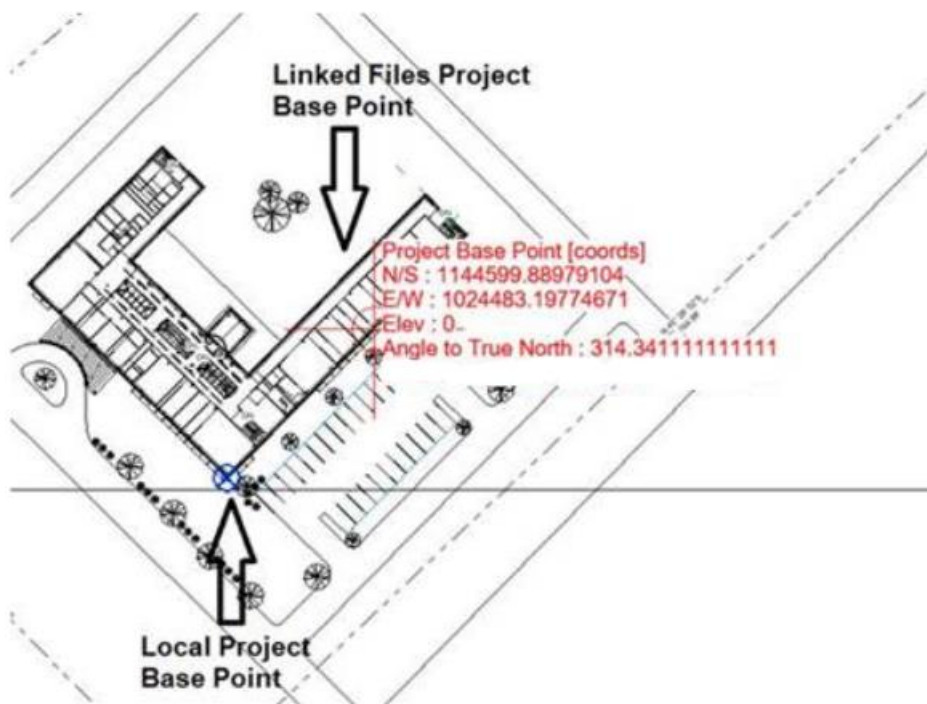


Figure 1 - Project Base Point

Additional information will be used to populate the table below when available.

Reference	Position
GF TOS	0.3m elev ASL
Local Project Base Point	1144599N, 1024483E (mm)

Building Point 1	1146577N, 1030445E (mm)
Building Point 2	1149233N, 1026731E (mm)

Table 11 - Origin and Orientation Values

5.3 FILE NAMING CONVENTION

The following section seeks to set out and identify the use of the correct naming conventions.

For compliance with section 3.5 of the employer's requirements, key objective documents will be identified in accordance with BS 1192.

The table below sets out the correct format for the naming conventions.

Scheme No	Originator	Volume	Level	File Type	Role	Classification (optional)	Number
5010	YBA	XX	00	See BS 1192, section 9.2	See BS 1192, section 10.2	See Uniclass 2015, FI Table	See below
			01	CT, Certificate			
			02	IV, Invoice			
			ZZ				

Table 12 - File Naming Values

5.4 OBJECT NAMING

The following section seeks to set out the correct object naming conventions

In order to adhere to the requirements as set out in the employer's brief, namely section 3.5, project objects are to be labelled to satisfy BS 8541-1.

Set out in the following table are the formats to be used

Source	Type	Subtype
Original Author, Manufacturer, Editor	See Ifc [Type]	See ...Type/numeration See product name

Table 14 - Object Naming Values

The following template is to be used for object type naming

Type/numeration>Number>Correct Object Name

5.5 LAYER NAMING CONVENTION

The following section seeks to set out the correct layering conventions.

In order to adhere to the requirements as set out in the employer's brief, namely section 3.5, project objects are to be labelled to satisfy BS 1192.

Set out in the following table are the formats to be used

Role	Classification	Presentation	Description
See BS 1192, section 10.2	See Uniclass2015	See BS 1192, section 12.2	See Uniclass2015

Table 15 - Layer Naming Values

5.6 AGREED CONSTRUCTION TOLERANCES

The following section seeks to set out tolerance values for construction.

For guidance whilst in the construction phase of the works, tolerance margins are to be identified as part of the ISO 5601 guidance.

5.7 DRAWING SHEET TEMPLATE

The following section seeks to set out the standard templates to be used for benchmarking purposes.

For guidance whilst in the design phase of the works, drawing templates are to be identified as part of the ISO 5457 guidance.

Contract drawings are to use the below ISO 7200 drawing title block.

	DOG & WOLF DESIGN LTD 	Project Ysgol Bae Abertawe		Title BIM Execution Plan				
		Document Type Specification		File name 5010-YBA-XX-XX-SP-Z-00001				
		Revision P01	Status S1	Date of Issue 2022-03-28	Scale NTS	Created DC	Checked DC	Approved DC

5.8 ANNOTATIONS, DIMENSIONS, ABBREVIATIONS, AND SYMBOLS

The following section seeks to set out and define the reference points for Annotations and symbols.

Compliant with BS 8541-2

All Abbreviations used will be sourced from the BRE BIM Terminology Tool <http://www.bre.co.uk/bimterminology.jsp>. Any abbreviations not sourced within this tool will be scheduled below:

Term	Acronym	Definition

Table 16 - Project Terms

5.9 ATTRIBUTE DATA

The following section seeks to set out the attribute data that is to be exchanged.

For compliance with the employer's requirements, namely section 3.2, relevant information has been indicated and is to be issued when relevant; as appendix E. To add to this, the BS 1192-4 relevant data will also be issued.

Classification shall be included in the Attribute Classification Reference For Objects included within **Appendix E**.

One classification code is to be used for objects. This will give details of its main use.

6.0 IT SOLUTIONS

The following section should detail its compliance with PAS 1192-2, 7.2.1 d.

6.1 SOFTWARE VERSIONS

The following sections seeks to set out the compatible software affiliated to the project.

Compatible software as defined below is to be used to produce contract documents.

Other versions of the specified software are not permitted due to risk integration degradation. The project info manager is to be consulted before proceeding.

Provider	Application	Program	Version
Autodesk	2D Modelling	AutoCAD	2022
Autodesk	3D Modelling & Creating of Drawings	Revit	2022
CodePlex	Federation & IFC Export	xBIM	2022

Table 17 - Project Software

6.2 EXCHANGE FORMATS

The following section seeks to set out exchanging formats to be adhered to.

The following exchange formats will be used through the project.

Below are the specified examples of the exchange formats to be implemented throughout the project.

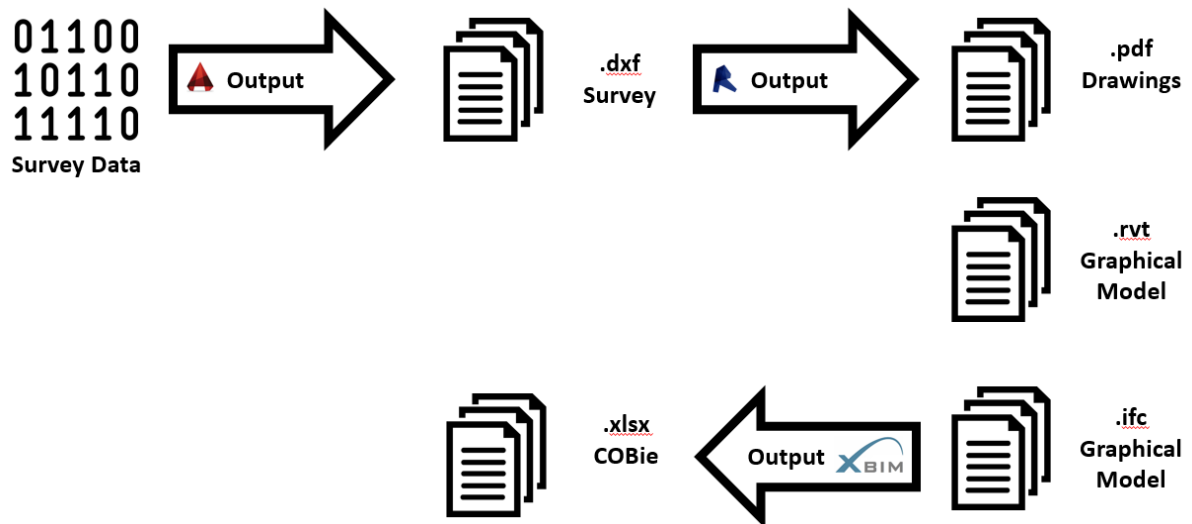
Export Software	Format	Version
AutoCAD	.dwg	2022
Revit	.rvt	2022
Revit	.ifc	2022, 2 x 2
xBIM	.xls	COBie-UK 2018
Revit	.pdf	NA

6.3 PROCESS AND DATA MANAGEMENT SYSTEMS

The following section seeks to identify the specified Data Management System

Due to the parameters of the project, there will be no requirements for a Data management system.

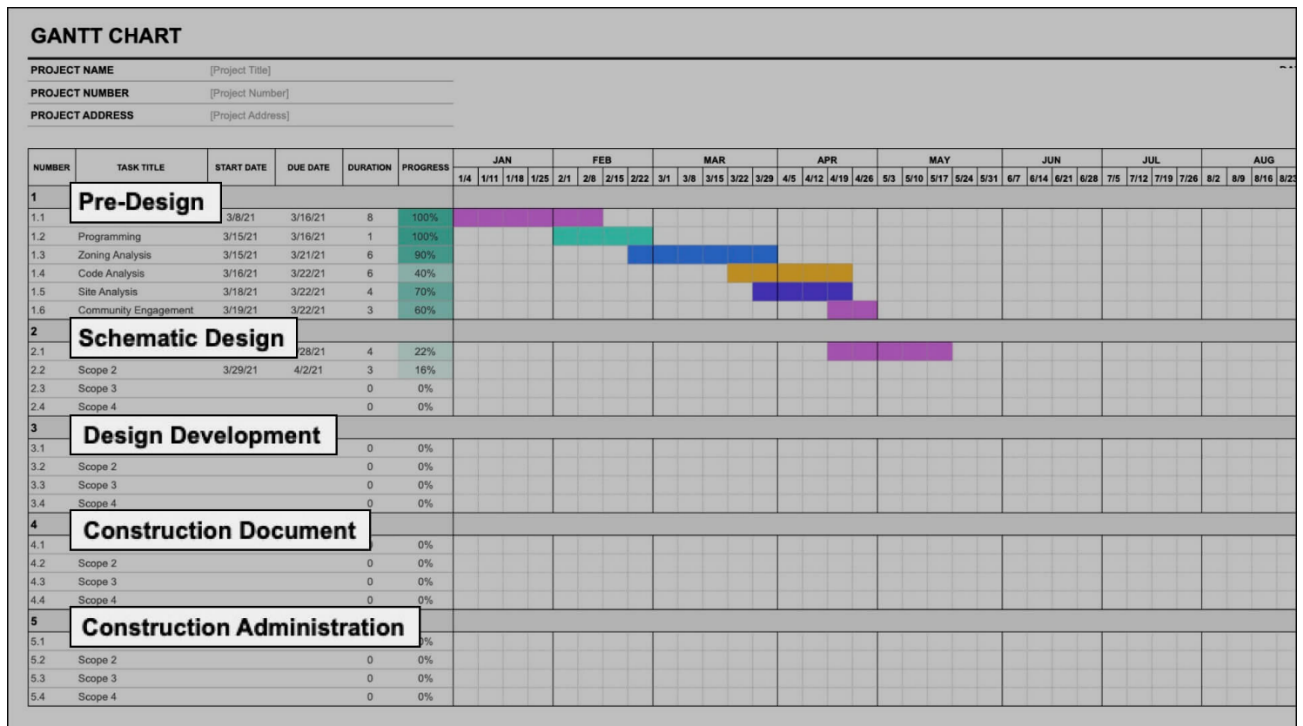
The transfer of data will be processed using the following methods:



Appendix A: Schedule of Existing Information

REV	KEY	SPEC.	DESCRIPTION
	1	01 10 00	PROPERTY LINE.
	2	01 10 00	REQUIRED BUILDING SETBACK LINE
	3	01 10 00	EXISTING SITE PAVING TO REMAIN. PROTECT DURING WORK.
	4	01 10 00	5 FOOT CLEARANCE FROM EXISTING DETACHED GARAGE.
	5	01 10 00	EXISTING SITE WALL TO REMAIN. PROTECT DURING WORK.
	6	01 10 00	LINE OF ROOF EAVE ABOVE.
	7	32 30 00	NEW CEDAR PLANK FENCE WITH STEEL TUBE FENCE POSTS. NATURAL FINISH. HEIGHT NOT MORE THAN 6 FEET RELATIVE TO GRADE ON EITHER SIDE.
	8	04 20 00 09 24 00	CONCRETE BLOCK FENCE STEM. PORTLAND CEMENT PLASTER PARGE FINISH TO MATCH BUILDING.
	9	32 30 00	NEW CEDAR PLANK GATE. NATURAL FINISH.
	10	09 30 00	TERRA COTA SATEO TILE PAVER FINISH AT PORCH AND STAIR TREADS WITH DECORATIVE GLAZED CERAMIC TILES AT STAIR RISERS.
	11	09 30 00	TERRA COTA SATEO TILE POT SHELF WITH COVED PLASTER DETAIL AT EDGES.
	12	32 13 13	CONCRETE PAVING WITH MEDIUM ROCK SALT FINISH
	13	32 90 00	LANDSCAPE AREA.
	14	23 30 00	NEW CAST METAL HVAC FLOOR REGISTER. 4" x 8"
	15	23 30 00	NEW CAST METAL HVAC FLOOR REGISTER. 6" x 14"
	16	01 10 00	LINE OF CEILING SOFFIT ABOVE.
	17	09 30 00 07 11 13	ROLL-IN SHOWER WITH TILE FLOOR AND WALLS PER FINISH SCHEDULE. HOT MOPPED SHOWER PAN BELOW TILE FINISH.
2	18	08 52 00	EMERGENCY EXIT WINDOW. CASEMENT UNIT AS INDICATED ON WINDOW SCHEDULE MUST PROVIDE NOT LESS THAN 5 SQUARE FEET OPENABLE AREA, NOT LESS THAN 24 INCHES CLEAR OPENING HEIGHT, NOT LESS THAN 20 INCHES CLEAR OPENING WIDTH, AND SILL HEIGHT NOT MORE THAN 4 INCHES ABOVE ROOM FLOOR LEVEL.

Appendix B – Master Information Delivery Plan



Gantt Chart Architecture Template (Lui, 2020)

Appendix B: Project Implementation Plan

Implementation Project Plan Template

Use this work sheet to track the status of your work implementing the project

TASK	DATE STARTED	DATE COMPLETED	COMMENTS
------	-----------------	-------------------	----------

#1 Organize the Implementation Effort

Total estimated time to complete: 1 month

Become familiar with the requirement to implement ICD-10 (See Additional Resources sheet)			
Identify project manager			
Identify key personnel to be involved in project plan			
Set a schedule for project meetings			
Begin preliminary budget for implementation costs, e.g., software upgrades, hardware upgrades, training, new forms, resource materials, etc.			
Plan for office communication on project			

#2 Analyze Impact of ICD-10 Implementation

Total estimated time to complete: 3 months

Determine which code sets you need to implement, ICD-10 diagnosis only or both the diagnosis and procedure			
Identify and list all work processes that use ICD-9 today (See ICD-9 Tracking sheet)			
Identify and list current electronic systems (e.g., practice management system) that use ICD-9 (See ICD-9 Tracking sheet)			
Identify all staff who work with ICD-9 and exactly what they do related to ICD-9 and ICD-9 coding			
Identify possible work flow changes you will need to make to implement ICD-10, e.g., data collection forms, encounter forms, superbills, etc.			
Determine if you need a consultant to assist you with implementing ICD-10, e.g., identify system changes, identify work flow changes, conduct training			

Implementation Project Plan Template (Template.net 2022)

Appendix D – Responsibility Matrix

ROLE	Executive Sponsor Project Sponsor Steering Committee Advisory Committee Role #5				Project Manager Tech Lead Functional Lead SME				Project Team Member Developer Administrative Support Business Analyst Role #4 Role #5				Consultant PMO Role #3 Role #4			
Project Deliverable (or Activity)	Project Leadership				Project Team Members				Project Sub-Teams				External Resources			
Initiate Phase Activities																
Request Review by PMO	A/C	R/A			R/A	A/C		C								
Submit Project Request					R									A		
Research Solution	I				R/A	A/C	A/C	C				C		C		
Develop Business Case	I	A/C	I	I	R/A	C	C	C				C		C	C	
Plan Phase Activities																
Create Project Charter	C	C			R/A	C	C	C				C		C		
Create Schedule	I	I	I	I	R/A	C	C	C	C	C	C	C		C	I	
Create Additional Plans as Required	I	I	I		R/A				I	I	I	I		C	I	
Execute Phase Activities																
Build Deliverables	C/I	C/I	C/I	C/I		R/A	R/A	R/A	R/A	R/A				A/C		
Create Status Report	I	I	I	I	R/A	R/A	R/A	R/A						C	I	
Control Phase Activities																
Perform Change Management			C	C	C	R	A	A	A					C	I	
Close Phase Activities																
Create Lessons Learned	C	C	C	C		R/A	C	C	C	C	C	C		C	C	
Create Project Closure Report	I	I	I	I		R/A	I	I	I	I	I	I		I		

RESPONSIBILITY MATRIX (EBY, 2016)

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