Liberty Healthcare Corporation and Affiliates (Liberty) Standard Operating Procedures

Title:	**New Contract Implementation Checklist**	Effective Date:	**11/05/2015**
Author:	**Sue Nayda**	Last Review Date:	
Location:	**Corporate HQ**	Last Revision Date:	
Functional Area:	**Operations**		

POLICY

Liberty Healthcare Corporation uses the **New Contract Implementation Checklist** as a project management tool to consolidate and communicate critical information to internal corporate office departments once a new contract is signed. Additionally, the checklist serves as a template for Operations Vice Presidents in developing the appropriate systems needed for initiation and early phases of contract implementation. The checklist is divided into several tabs; each tab is focused on a specific system function.

PROCEDURE

1. Once a new contract is signed, the Operations Vice President (VPO) who is assigned to the contract completes the necessary information in the universal sections of the New Contract Implementation Checklist:
    1. Cover Sheet
    2. Staff Hiring - Payroll
    3. Customer - Stakeholder
    4. Budget - Financial Management
    5. Liberty QualityCare®
    6. Equipment
    7. Administration

2. Within one week of contract signing, the designated VPO holds a meeting with the following internal corporate office staff/departments: Chief Operations Officer, Human Resources, Accounting, Legal, Recruitment, Credentialing and Relias Learning support. The New Contract Implementation Checklist Cover Sheet and other documents are distributed and discussed at this meeting. The VPO provides an overview of the scope of work, start-up timelines, customer expectations, and any additional information requested during the meeting.
3. Subsequent to the initial kick-off meeting, the VPO and/or contract Executive Director completes the contract specific tabs on the New Contract Implementation Checklist as needed, as information becomes available and as individuals are hired and assigned to each specific task. Each tab provides space to document progress and task completion date for monitoring the successful implementation of the early phases of the new contract. The checklist is maintained in the active contract folder of the RDS/Operations drive and is updated weekly.
4. Once the early phases of contract implementation are complete, the VPO may include any tasks/items that are on-going into an annual implementation plan if appropriate.

Approved By: Sue Nayda

Digitally signed by Sue Nayda
DN: cn=Sue Nayda, o=Liberty Healthcare, ou, email=sue.nayda@libertyhealth.com, c=US
Date: 2015.11.09 17:15:34 -05'00'

Date: November 05, 2015

New Contract Implementation Checklist
{Type Project Name & Acronym here}

Program Address

Program Phone	**Contract Start Date**	**Contract End Date**

	http://
Customer Organization	**Customer Website**

Customer Contact Name	**Title**	**Email**	**Phone**

Vice President	**Accountant**

Sales Lead	**Recruiter(s)**

Send copies of this cover sheet to: Camille Tanner; Shirley Greenlee; Debi Snyder; Cathy Oblea; Judith Shields; Sue Nayda; Rhonda Thomas

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Design initial orientation/start-up training curriculum to include the following topics:			
1a. Welcome by Liberty leadership.			
1b. Completion of HR/benefit paperwork.			
1c. Workforce Management (WFM) overview.			
1d. Selected LHC policies.			
1e. Orientation to Employee Self Service (ESS).			
1f. Orientation to Liberty QualityCare ® Training.			
1g. Initial Relias training for all staff.			
1h. Initial Relias training for designated Relias Supervisor, if applicable.			
1i. Review of travel & reimbursement policies for staff who will be traveling.			
1j. High performance culture.			
1k. Customer service, including what the customer priorities are in this contract.			
1l. Use of telephone, computer, internet, copier and fax system(s).			
2. Determine titles/content/dates of live courses to be provided to staff during orientation.			
3. Develop schedule and secure trainers for initial orientation/start-up training.			
4. Determine venue for orientation/start-up training; arrange for space and equipment rental, if needed.			
5. Arrange for lunch and break refreshments for orientation training.			
6. Arrange to have orientation training sessions videotaped.			
7. Develop system to track orientation courses in Relias.			
8. If Relias is going to be managed by corporate staff, give Relias supervisor the titles of any live orientation courses to be entered into Relias.			
9. Compile training manuals and materials (employee handbooks, policy and procedure, vocational/clinical manuals, emergency plans, etc.).			
10. If live courses were done during the orientation, enter attendance and course completion data into system.			
11. Design training for new hires after initial opening.			
12. Design ongoing in-service training program.			
13. Compile training manuals and materials for ongoing in-service training.			
14. Develop new hire and ongoing/refresher training curricula for staff at location.			

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
15. Designate internal program staff position to manage Relias system, if possible.			
16. Schedule initial Relias training for designated Relias Supervisor, if applicable.			
17. Notify Relias supervisor of type of contract (staffing or program) and the type of services to be provided (facility management, program management, quality, ROC, SOMS, staffing).			
18. Notify Relias supervisor and VP of HR of the number and date users will be enrolled in Relias.			
19. Give Relias supervior the title(s) of each on-site Relias supervisor, if any.			
20. Determine how all Relias users will have computer access.			
21. If contract is in more than one location, give addresses of each location to Relias supervisor.			
22. Notify Relias supervisor regarding the type of training management required (i.e., central on-site, on-site by location or corporate management).			
23. Give Relias supervisor a list of any contract positions that will not be employed by LHC, such as MBE/WBE staff.			
24. Give Relias supervisor a list of any contract positions that are eligible to receive and sign alternatives to online training, such as staff without computer access.			

Contract Implementation Checklist
Operations
Staff Hiring-Payroll

Project Name & Acronym:	**{Type Project Name & Acronym here}**		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Develop Job descriptions for each position if not completed during proposal process.			
2. Develop or revise contract Table of Organization.			
3. Submit job descriptions to Recruiting and Credentialing.			
4. Submit final Open Requisitions to Recruiting for each position.			
5. Notify Credentialing of credentialing requirements in this contract, especially any unusual items such as pre-hire testing/fingerprinting needs to occur.			
6. Notify Legal of the types of boilerplate contracts that will be needed (exempt/non-exempt, PRN staff and/or subcontractor agreements) and if any special requirements need to be included.			
7. Discuss recruitment strategies with VP of Recruitment, if necessary.			
8. Review "Changes/Additions to Employment Agreement Form" with recruiter before it is submitted to Legal.			
9. Establish weekly (or more often as needed) meeting with recruiters during recruitment process.			
10. Provide staff position titles, number of expected FTEs, shift schedule, number of annual and PTO hours per position, time category(FT, PT, PRN), employment type (employee, consultant, SDB or subcontractor) and exemption status to HR and Payroll.			
11. Inform Payroll whether subcontractor staff will be paid hourly or 1/12th of annual compensation.			
12. Provide to Payroll the position titles, type of WFM Timesheet (Punch/Actual Time-Honors/#hours-Honors), timesheet approvers (Liberty & non-Liberty), whether holidays will be prepopulated on the WFM timesheets, whether schedules will be used and the details of any special pay arrangements.			
13. Provide Payroll with the number of work hours per day, if there is hour flexibility within a week or bi-weekly, the focal point review date and mileage rate for approved travel.			
14. Inform accounting if a special weekly/biweekly staff mileage reimbursement form will need to be developed.			
15. Notify Payroll of the amount of any shift differential that will be paid.			
16. Provide Payroll with the names and email addresses of all timesheet approvers in the contract, including LHC approvers and state employee approvers, when available.			
17. Inform Payroll if any staff work in multiple locations or are involved in multiple contracts (i.e., a physician who may provide on-call or PRN coverage across several contracts).			
18. Inform Payroll of contract holiday schedule.			
19. Establish focal point review date and communicate the date to Accounting and HR.			
20. Inform Accounting of any positions that are eligible for reimbursement of home office expenses.			

Contract Implementation Checklist
Operations
Customer-Stakeholder

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Identify the name and contact info of all primary customer contacts and give information to Operations Coordinator for inclusion in Liberty Customer List.			
2. Add customer contacts and program contacts to the public contact folders.			
3. Obtain customer's table of organization.			
4. Develop Customer Retention Strategy form.			
5. Develop plans to "meet and greet" and develop relationship with top customer (i.e., secretary, commissioner, CEO, etc.).			
6. Get customer buy in on data reporting and reporting format.			
7. Identify any conferences, events, fundraisers, etc. that are important to the customer and develop a plan to have a presence.			

Contract Implementation Checklist
Operations
Budget-Financial Management

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Analyze operating budget plan for start-up period and first year of contract. Obtain COO and President approval if revenue and/or margin is materially different than original pricing budget.			
2. Meet with Controller to agree upon internal financial reporting needs and timelines.			
3. Meet with Controller to review customer invoicing requirements and method of providing necessary information to Accounting for timely invoicing.			
4. Meet with Controller and Accounts Payable staff to brief them on program purchasing needs and determine best ways to meet program needs.			
5. Establish petty cash account, if necessary.			
6. Order program credit card, if necessary.			
7. Set up additional charge accounts, if necessary.			

Contract Implementation Checklist
Operations
Liberty QualityCare®

Project Name & Acronym:	**{Type Project Name & Acronym here}**		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Develop program mission statement.			
2. Orient program leadership to Liberty QualityCare®, HIPAA, and Corporate Compliance SOPs.			
3. Develop Key Performance Indicators for first year of operation and document on KPI Tool.			
4. Develop data collection methods for monthly KPI reporting.			
5. Develop local systems for incident reporting, sentinel events, complaint investigations and grievance resolution. Make sure systems are integrated with Liberty and customer systems.			
6. Establish procedure for quarterly or annual review of program performance.			
7. Populate contract compliance audit tool and update form when amendments occur.			
8. Make sure all items on contract compliance audit tool are addressed in program implementation.			
9. Determine date for Annual Program Summary. Alert Operations Coordinator to include on master list.			
10. Schedule first Contract Compliance Audit to occur within the first six months of operation.			
11. Schedule first QualityCare® annual review with VP of Performance.			

Contract Implementation Checklist
Operations
Equip-Insur-Office-Purchasing

Project Name & Acronym:	**{Type Project Name & Acronym here}**		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. For programs without facilities, develop a space utilization plan to determine space and size needed.			
1a. If program space not provided by customer, VPO in conjunction with COO engages commercial real estate agent.			
1b. VPO provide realtor with information regarding location, # FTEs, and basic features and amenities needed.			
1c. Realtor does property search in collaboration with local onsite realtor to present viable options for office space			
1d. Based on review of listings and property "walk throughs", of those meeting agreed upon criteria, Leadership selects the property best meeting Liberty needs.			
1e. VPO coordinates with internal Legal, Realtor, and Landlord to negotiate and sign lease.			
2. Develop list of all furniture and equipment required by room location.			
3. Review furniture and equipment needs against the furniture and equipment provided by existing program and/or by customer.			
4. Determine needs for computer equipment: server, scanners, network, desktops, laptops, printers, copiers, and fax machine.			
5. Coordinate with corporate IT (or customer/partner, if indicated) to order equipment.			
6. Determine need for telephone, data lines and electrical outlets.			
7. Determine whether program will use Liberty email system or other client system.			
8. Organize internet access.			
9. Order telephone system, cell phones and office equipment.			
10. Arrange for phone service.			
11. Install hardware.			
12. Evaluate need for electronic medical record.			
13. Organize print and fax functions.			
Please refer to Procurement and Purchasing Policy for all purchases below:			
14. Determine what services/supplies will need to be purchased from outside vendors.			
15. Identify any MBE/WBE requirements for purchasing as per contract.			
16. Identify vendors who can provide needed services/supplies and obtain quotes.			
17. If necessary, obtain credit reference letter from corporate to take to vendors.			
18. Obtain bill processing procedure from corporate and determine who is responsible at the facility to process invoices.			
19. Check with Accounting to see if there are any existing contracts for the type of service/supplies required.			
20. Order furniture.			
21. Order education supplies.			

Contract Implementation Checklist
Operations
Equip-Insur-Office-Purchasing

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
22. Order recreation supplies.			
23. Order vocational supplies.			
24. Order assessment and clinical supplies.			
25. Order office supplies.			
26. Order copiers, etc. (if not done with IT).			
27. Order business cards for staff interacting with the public.			

Contract Implementation Checklist
Operations
Administration

Project Name & Acronym:	{Type Project Name & Acronym here}		
Task	**Person Responsible**	**Progress/Updates**	**Completion Date**
1. Develop clinical/program implementation plan.			
2. Develop program description describing overall program structure, including treatment milieu and philosophy.			
3. Clarify roles of various treatment providers (i.e., psychiatrist, clinical director, psychologist, etc.) regarding treatment planning and clinical decision making.			
4. Determine what PR materials are needed for the program and whether a lobbyist will be needed.			
5. Give site email addresses of top managers to corporate IT to put on global address list.			
6. Set up Operations metaframe active contract folders & system for filing.			
7. Add program director to monthly meeting invitations.			
8. Set up new location and travelers in Concur.			
9. Set up program name in corporate forms such as Open Requisitions, Contract Abbreviation List, etc.			