PHC Hub 4.17.5

Project Tracker

A project is used to manage all the activities (actions) taking place during the onboarding process. This includes the initial discovery steps, testing, installing, and ongoing monitoring of the interface.

Phases

An interface project may be broken down into the following phases:

- Discovery
- Planning
- Developing
- Testing
- Training
- Installing
- Live
- Closed
- Suspended

To view the phases, click the **Phases > View** Phases menu link.

The list contains the phase names and the total number of projects currently in each phase. Sort the list by clicking on the heading buttons. Click a phase in the list to view the details.

Phases — Print Preview

	Code	Phase
1	Closed	1
2	Developing	2
3	Discovery	10
4	Installing	0
5	Live	2
6	Planning	6
7	Suspended	1
8	Testing	2
9	Training	0
10	Unknown	0

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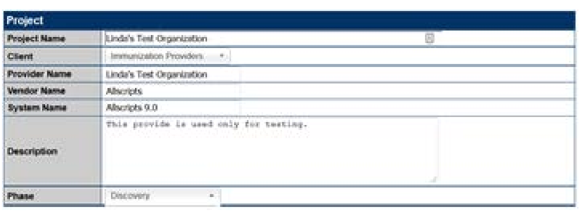
Projects

A project contains the project information, linked projects, contacts, and actions. Click the **Projects > Project Details** menu link to add contacts, link projects, and log actions.

To create a new project, click **Projects > New Project**, enter the information, and click **Save**.

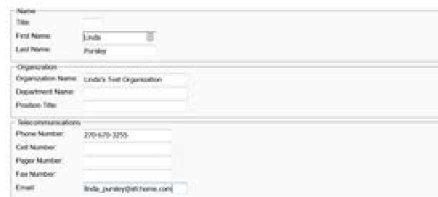


To edit a project, click the **Projects > Select Project** menu link, select the project in the list, and click **Edit**. Make the changes and click **Save**.

Contacts

Contacts are the people associated with a project. Multiple contacts may be required for each project. Example contacts include representatives from the provider, IIS, and EHR vendor.

To create a new contact, click the **Contacts > New Contact** menu link. In the Name section, the first and last names are required, but the remaining fields are optional. However, it is recommended that you add at least the organization, phone number, and email address. Click **Save** when finished.



To edit a contact, click **Projects > View Contacts**, select the contact from the list, and click **Edit**. Make the changes and click **Save**.

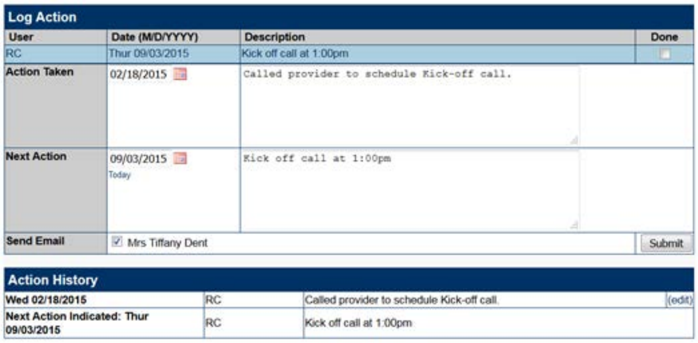
To add a contact to a project, click **Projects > Select Project** and select the project from the list. In the Contacts section of the page, select a contact from the drop-down and click **Assign**.

Actions

Actions allow you to track a project's activities and their statuses. They are steps that need to be taken to move a project forward.

To add a project action, click the **Projects > Select Project** menu link and select the project from the list. In the Log Action section of the page, select a date, add a description, and click **Submit**.

Use the Action Taken section to log an action that has already occurred. Use the Next Action section to log an upcoming action. Use the Send Email section to select the contacts you want to notify via email about an action.

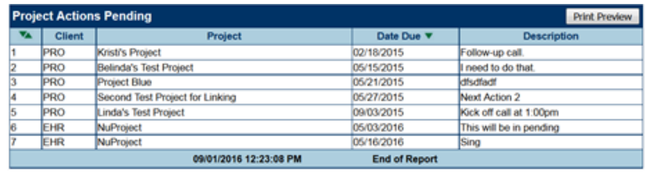


To edit a project action, click **Projects > Select Project** and select a project from the list. In the Action History section, locate the action you want to change. Click the **(edit)** link. The action moves to the Log Action section of the page. Make the necessary changes and click **Submit**.

To complete project actions, locate the action you completed in the Log Action section and select the Done box for it. Click **Submit**. Note that once an action is completed, only the details can be edited. The action cannot be reopened.

To view project actions, open the Actions menu category and click an action type to view that list:

- Due Today
- Over Due
- Pending
- Complete



Project Actions Pending — Print Preview

	Client	Project	Date Due	Description
1	PRO	Kristi's Project	02/18/2015	Follow-up call.
2	PRO	Belinda's Test Project	05/15/2015	I need to do that.
3	PRO	Project Blue	05/21/2015	dfsdfadf
4	PRO	Second Test Project for Linking	05/27/2015	Next Action 2
5	PRO	Linda's Test Project	09/03/2015	Kick off call at 1:00pm
6	EHR	NuProject	05/03/2016	This will be in pending
7	EHR	NuProject	05/16/2016	Sing

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Link Projects

Linking projects allows you to create an associate between projects. Note, however, that projects cannot be unlinked once they are linked.

To link two projects, click the **Projects > Select Project** menu link and select the first project from the list. In the Link Projects section of the page, select the second project from the drop-down list. Click **Link**.