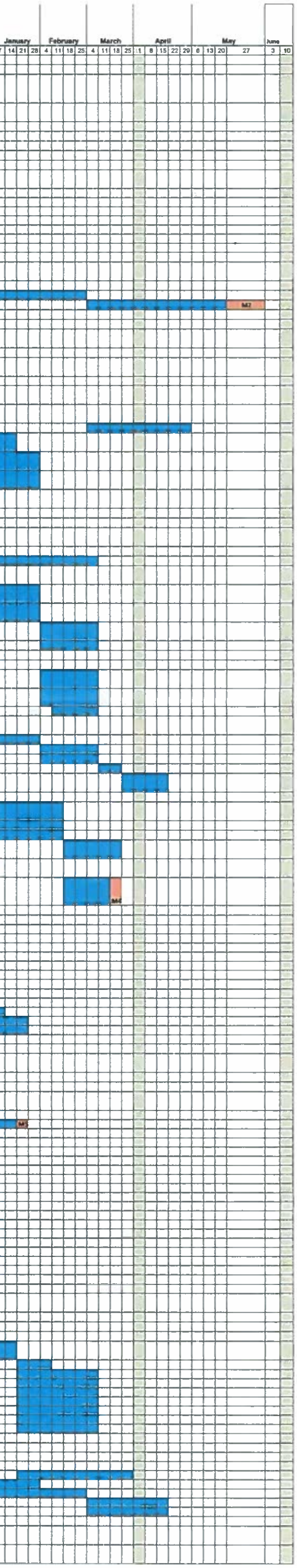
Lot 2 – Sandy Lane Surgery, Rugeley

NHS England

Task	Action needed	Action by	Status
Project Initiation & Governance			
Contract award	As per task	NHSE	
Horsefair Practice Group Overarching Management and Governance Board will be insitu to Manage the Lot 1 &2 APMS contracts	Established prior to contract award	HPG	
Create Project initiation documents & review mobilisation plan	As per task	HPG & PL	
Update risk log & communication plan	As per task	HPG & PL	
Set up lessons learnt log	As per task	HPG & PL	
Sign off with CCG	As per task	HPG & PL	
Mobilisation checkpoint meetings established	As per task	HPG & PL	
Agree escalation points of contract with commissioner	As per task	HPG & PL	
Pull together mobilisation teams inc HR, Finance, Operational, IM&T, Governance, Performance	As per task	HPG & PL	
Contract sign off with NHS England /CCG	As per task	HPG & PL	
Apply for new ODS code	As per task	PL	
Arrange mobilisation meetings with CCG/incumbent provider	As per task	PL	
agree high level handover process with incumbent	As per task	HPG & PL	
Patient engagement events	As per task	HPG & PL	
PPG meeting	As per task	HPG & PL	
Staff engagement meeting	As per task	HPG & PL	
TUPE Staffing and workforce			
Commence recruitment of Clincal & Administrative Staff identified as shortfall in workforce plan	As per task	PL	
Place adverts in all relevant circulations	As per task	PL	
Shortlisting & Interviews	As per task	HPG & PL	
Appointment and lead time for commencement(existing staff)	As per task	HPG & PL	
Establish staff consultation and communication processes	As per task	PL	
Produce consultation document for all staff affected by TUPE	As per task	HPG & PL	
Commence engagement with staff subject to TUPE including 1.1 discussions, Q&A sessions and formal notification	As per task	HPG & PL	
Check registration and qualifications of all retained staff	As per task	PL	
Review skills across services and develop redeployment plan if necessary	As per task	HPG & PL	
Agree T&C, job matching	As per task	HPG & PL	
Where changes are planned to employee roles engage in clear consultation and offer appropriate support	As per task	HPG & PL	
Prepare paperwork for employment checks and ensure completed	As per task	PL	
Develop and implement induction programme	As per task	PL	
Identify existing working policies and ensure compliant with legal minimums	As per task	PL	
Identify payroll mechanisms and ensure in place for commencement date	As per task	PL	
Register as Employing Authority with NHS Pensions and transfer staff	As per task	PL	
Comprehensive handover on HR issues including disciplinary, grievances, sickness	As per task	HPG & PL	
Comprehensive handover of staff files	As per task	HPG & PL	
Comprehensive handover of payroll information	As per task	HPG & PL	
Identify existing methods of retaining and monitoring staff training records and update as necessary	As per task	PL	
Quality & Governance			
Apply for or Amend CQC registration	As per task	PL	
Identify risks associated with contracts and inform Horsefair Board	As per task	PL	
Review training needs analysis, identify gaps and source training, first emphasis on mandatory training	As per task	PL	
Review Practice governance policies and ensure in line with Horsefair Practice Group policies	As per task	PL	
Review incident reporting policy and update with Horsefair reporting structure	As per task	PL	
Review Business Continuity plans and update as required	As per task	PL	
Complete Equality Impact Assessment for changes	As per task	PL	
Complete Environmental impact Assessment for changes	As per task	PL	
Review information sharing agreements and update to reflect Horsefair Practice Group Policies	As per task	PL	
Review process for cascading eg MHRA and adapt if necessary	As per task	PL	
Review Practice CQC report and manage any concerns	As per task	PL	
Establish with commissioners process for managing serious complaints and incidents prior to contract start date	As per task	PL	
Ensure adequate indemnity cover is in place for all clinicians	As per task	PL	
Establish quality & governance steering group	As per task	NL	
Review practice infection control policies and implementation	As per task	NL	
Develop audit plan for 1st year	As per task	NL	
Review how patient satisfaction is gathered and used and revise as required	As per task	PL	
Operations & Service Delivery			
Review Appointment structures and make essential changes where necessary to comply with Bid proposals	As per task	OM & PL	
Review appointment process and make essential changes	As per task	OM & PL	
Ensure rotas provide sufficient capacity to deliver KPIs	As per task	OM & PL	
Review contracts for services / equipment (e.g. telephones) and ensure they are transferred to Horsefair Practice Group.	As per task	OM & PL	
Identify demand and capacity and plan demand management processes.	As per task	OM & PL	
Ensure rotas and staffing are in place for contract award date and six weeks in advance as per Horsefair standard Procedures.	As per task	OM & PL	
PCSE			
Notify PCSE of new ODS code	As per task	PL	
Register new code for Portal	As per task	PL	
Link with NHSE regarding transfer of patients to new code	As per task	PL	
Pension arrangements in place	As per task	PL	
NPL forms submitted	As per task	PL	
Equipment			
Review equipment in - situ	As per task	PM/MA	
Create or review asset management list	As per task	PM/MA	
Set up ordering of equipment and stationary, procurement	As per task	PM/MA	
Check Electrical testing PAT	As per task	PM/MA	
Check calibration and servicing up to date	As per task	PM/MA	
Infastructure and IM&T			
Undertake audit to ensure processes are compliant with HSCIC guidance and IG toolkit	As per task	NI	
Review and update IMT disaster recovery plan as required	As per task	NI	
Work with commissioners to amend contract with HIS	As per task	NI	
Check system for transferring safeguarding referrals and ensure it is being used correctly	As per task	NI	
Arrange IT site visit	As per task	NI	
Ensure lease/licences terms are agreed	As per task	NI	
Review the IT equipment	As per task	NI	
Review clinical system provision	As per task	NI	
Confirm capacity and requirement -hardware	As per task	NI	
Estates visit to review premises and telephones	As per task	NI	
Health and safety review	As per task	OM	
Fire safety review	As per task	OM	
Accountable persons for health and safety confirmed	As per task	OM	
Accountable persons for fire confirmed	As per task	OM	
Establish event reporting process	As per task	OM	
Establish Controlled Drugs register	As per task	CGL	
Review courier collection and times	As per task	PM/MA	
Establish confidential waste removal contract	As per task	PM/MA	
Establish sharps and clinical waste removal	As per task	PM/MA	
Clarify arrangements for consumables	As per task	NL	
Order drugs required and resus equipment	As per task	NL	
Review fridge and compliance including monitoring	As per task	NL	
Performance, Documentation & Information			
Review APMS service specification	As per task	OM	
Undertake benchmark exercise to establish current data collections	As per task	OM	
Establish data sets for capture	As per task	OM	
Agree & finalise KPIs and reporting schedules with CCG	As per task	OM	
Create reporting templates for collection of data	As per task	OM	
Establish data sharing agreements to enable access to practice level information	As per task	OM	
Establish central data collection point for ongoing collections	As per task	NI	
Ensure policies are up to date	As per task	PM/MA	
Operational policy	As per task	PM/MA	
Clinical Policies	As per task	PM/MA	
IG and data security policy	As per task	PM/MA	
Chaperone and lone worker policy	As per task	PM/MA	
Health & Safety policy	As per task	PM/MA	
Business continuity plan	As per task	PM/MA	
Processes			
Review risk assessments	As per task	OM	
Establish compliance audits	As per task	OM	
Establish OOH cover	As per task	OM	
Establish staff rotas	As per task	OM	
Review clinical pathways	As per task	CGL	
Check arrangements with local pharmacies	As per task	CGL	
Set up access CQRS, webtool etc	As per task	OM	
sign up for enhanced services	As per task	OM	
Premises			
Ensure transfer of lease agreements and Heads of Terms to new organisation	As per task	PM/MA	
Review standard of premises and identify task list for essential improvements	As per task	PM/MA	



Key

- Task Timeline
- Service commencement and Full Service Delivery
- Not Started
- In progress
- Completed
- M Milestone

Owners

CGL	Clinical Governance Lead
PL	Project lead
CCG & H	CCG & Horsefair Practice Group Board
NHSE	NHS England
HIS	Health Informatics Service
HPG & PL	Horsefair Practice Group Board & Project Lead
NL	Nurse Lead
OM & PL	Operations Manager and Project Lead
PM/MA	Project Manager/Management Assistant
NI	IM&T Lead
OM	Operations Manager