



Task	Accountable	Due Date	Actual Date	Status	Implementation Comments	Milestone
Strategy planning, program review and State of Indiana kick-off						
Notify all implementation stakeholders of the award of business	Optum	10/6/2021				
Schedule weekly implementation team meetings	Optum	10/6/2021				
Identify and schedule client specific meetings	Optum, Client	10/6/2021				
Provide implementation project plan to State of Indiana	Optum	10/12/2021				
Initial kickoff meeting with State of Indiana to confirm product deliverables	Optum, Client	10/12/2021				x
Confirm what programs require a program/company logo, if applicable	Optum, Client	10/12/2021				
Obtain the logo from State of Indiana	Optum, Client	10/25/2021				
Ensure that legal contracts are in place; HIPAA and regulatory requirements are fulfilled						
Determine level of integration with external vendors	Optum, Client	10/6/2021				
Identify all vendors referral processes that will require a legal agreement to protect Personal Health Information	Optum, Client	10/6/2021				
Obtain legal contacts for State of Indiana	Optum, Client	10/12/2021				
Identify all confidentiality document needs and establish tracking timeline for Non-Disclosure Agreement(s)	Optum SAE	10/12/2021				
Ensure that all confidentiality agreements are finalized	Optum SAE	10/18/2021				
Ensure that all contracts are finalized	Optum, Client	12/17/2021				x
Establish operational site infrastructure						
Site Infrastructure and Human Resource Planning						
Confirm site location	Optum Operations	10/13/2021				x
Develop staffing models for anticipated membership	Optum Operations	10/19/2021				
Design and test telecommunication strategy and phone scripting						
Confirm telecom requirements	Optum Telecom	10/25/2021				x
Determine if custom scripting is required	Optum, Client	11/12/2021				
Sign-off on call flow	Optum, Client	11/17/2021				x
Integrated Program Solutions and External Vendor Interfaces						
Identify external vendors and level of integration requested	Optum, Client	10/12/2021				x
Determine integration points between Optum programs	Optum	10/12/2021				

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Determine how data will be shared with external vendor (warm transfer, fax, email)	Optum, Client	10/19/2021				
Identify the client's vendors, programs, conditions, populations and determine how to communicate the new Optum services to the clients vendors	Optum, Client	10/19/2021				
Schedule meeting with State of Indiana to review information from vendors and determine business rules	Optum, Client	10/25/2021				
Communicate the expectation of exchanging Personal Health Information (PHI) via the secure electronic means with Optum.	Optum, External Vendors	10/25/2021				
Review all processes with State of Indiana to demonstrate member experience	Optum, Client	11/5/2021				
Review interface process for all appropriate services	Optum, Client	11/5/2021				
Review processes and determine if modification is needed for State of Indiana specific requirements	Optum	11/5/2021				
Identify development needs for interfaces and processes	Optum	11/12/2021				
Develop corresponding job aids for new processes	Optum Operations	11/12/2021				
Test the vendor phone numbers provided by State of Indiana	Optum	12/22/2021				
EAP/Work Life Services						
Overview meeting of the Employee Assistance Program	Optum, Client	11/2/2021				
Overview meeting of Critical Incident Response (CIR) Services	Optum, Client	11/16/2021				
Overview meeting of Management Consultant Services	Optum, Client	11/16/2021				
LWW Demo and review site options	Optum, Client	11/16/2021				
Determine current process with terminating vendor and see if any special notes	Optum	11/16/2021				
Overview of EAP and Self-Bill	Optum, Client	12/14/2021				
LWW Member Portal Live	Optum	12/31/2021				x
Establish a Member Engagement Plan						
Confirm member engagement requirements	Optum	10/25/2021				
Determine State of Indiana specific branding for communication materials; identify all materials requiring branding and develop production timeline	Optum, Client	10/25/2021				
Determine the text, layout and draft the materials	Optum	10/28/2021				
Review and receive sign off on member communications and letters	Optum	10/28/2021				x
Complete customized materials for programs (if applicable)	Optum	12/17/2021				
Training						
Confirm training needs and start date	Optum	10/25/2021				
Deliver the final signed-off job aids to training, if applicable	Optum	11/23/2021				x
Conduct training	Optum Trainers	12/7/2021				
Deliver existing staff training as required	Optum Trainers	12/17/2021				
Deliver/collaborate on trainings with external vendor/carriers as required	Optum Trainers	12/17/2021				
Provide training on all programs to client's benefit team (client specific training)	Optum	12/17/2021				
Confirm completion of all training	Optum	12/28/2021				x

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Establish reporting requirements						
Confirm reporting requirements and review with client	Optum, Client	10/19/2021				x
Review standard process measures and metrics (i.e., activity, call stats) with State of Indiana	Optum, Client	10/25/2021				
Review outcome and metrics (i.e. clinical outcomes, financial outcomes) with State of Indiana	Optum, Client	10/25/2021				
Determine the method of transmission (FTP, secure e-mail or other for all program reporting)	Optum	10/25/2021				
Document reporting requirements and send to State of Indiana	Optum SAE	11/5/2021				
Ensure operational readiness						
Confirm site readiness (hardware, equipment & infrastructure in place)	Optum	12/14/2021				
Test phone lines	Optum	12/28/2021				x
Confirm training (internal and external) has been completed	Optum	12/28/2021				x
Pre-launch audit completed	Optum	12/31/2021				x
Schedule post-implementation assessment with State of Indiana and consultant	Optum, Client	12/31/2021				
Mitigate and review all known open issues	Optum	12/31/2021				
Post-Implementation						
Conduct post-implementation status meetings	Optum, Client	2/2/2022				x
Review open items list and action plans	Optum	2/2/2022				
Implement audit/monitoring process	Optum	2/2/2022				