

Created by KaiNexus for:

Magellan
HEALTH®

KN

Projects in
KaiNexus

KaiNexus

WELCOME



Created for HFHS by:

ADAM **DARNELL**

Training & Enablement Manager

This presentation covers the information presented in the Magellan Health custom training video “Working with Projects.”

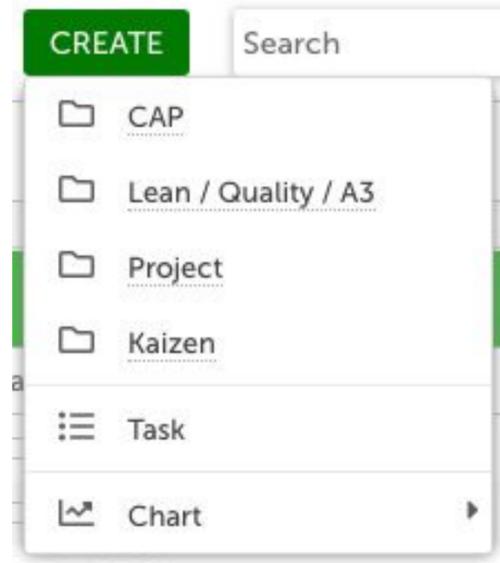
For more detailed instructions, [watch the video here](#):



How to Create & Edit Projects:

1. Click the green Create button

2. Select Project from the dropdown



3. Fill in the Required and Optional fields as needed. This will populate all of the information for your Project.

Create Project

A screenshot of the 'Create Project' form. It contains several text input fields, each with a label and a '+' icon to its right. The fields are: Title (Required), Problem Statement (Required), Goal Statement (Optional), In Scope (Optional), Out of Scope (Optional), Proposed Solution(s) (Optional), Business Case & Benefits (Optional), and Deliverables. A blue arrow points from the text 'Fill in the Required and Optional fields as needed...' to the 'Required' label in the Title field.

4. Click the blue Create button to submit your Project.



Details of Project

Problem Statement
We want to utilize the new Project process more.

Goal Statement
Use Project template to create cost savings and productivity improvement.

In Scope
None

Out of Scope
None

Proposed Solution(s)
Learn about the process and pass information on internally.

Business Case & Benefits
None

Deliverables
None

IT Ticket
None

Root Cause Remediation Category (CAP Projects only)
N/A

Top Level Strategy
KPI's

Prioritization

Level of Effort
3: < 30 days, < 3 people

Compliance Impact
Yes

IT Dependency
Not Sure

Business Impact
9: High business results impact or FTE Savings

Edit Any Panel →

Team

Project Manager / Facilitator

Individual Contributor

+ Follow

Assemble a Team

Dates

Created Mar 18, 2019

Start None

Due None

Last Updated Mar 18, 2019

Activate

Click to Activate

To activate a Project, add the team.

Hover over the information icon next to the role titles to learn more about them.

Scores

Prioritization Score 27

Prioritization Score

Files

+ Add File

Attach Files & Links

Links

+ Add Link

Add Comments

Comments

Leave a comment...

Timeline

Thursday Apr 02, 2020

- 1:49 PM Individual Contributor completed this.
- 1:48 PM Individual Contributor updated the Actual Resolution.
- 1:43 PM Individual Contributor added Correspondence Project Standard Work.

View Timeline

Activate

Executive Sponsors: ①
None

Project Managers / Facilitators: ①
KaiNexus Support (Myself) x

Operational Leads / Process Owners: ①
None

Team Members: ①
None

Follower(s):
None

You must comply with Magellan's Privacy Policy while using KaiNexus. health information (ie. PHI) under any circumstances.

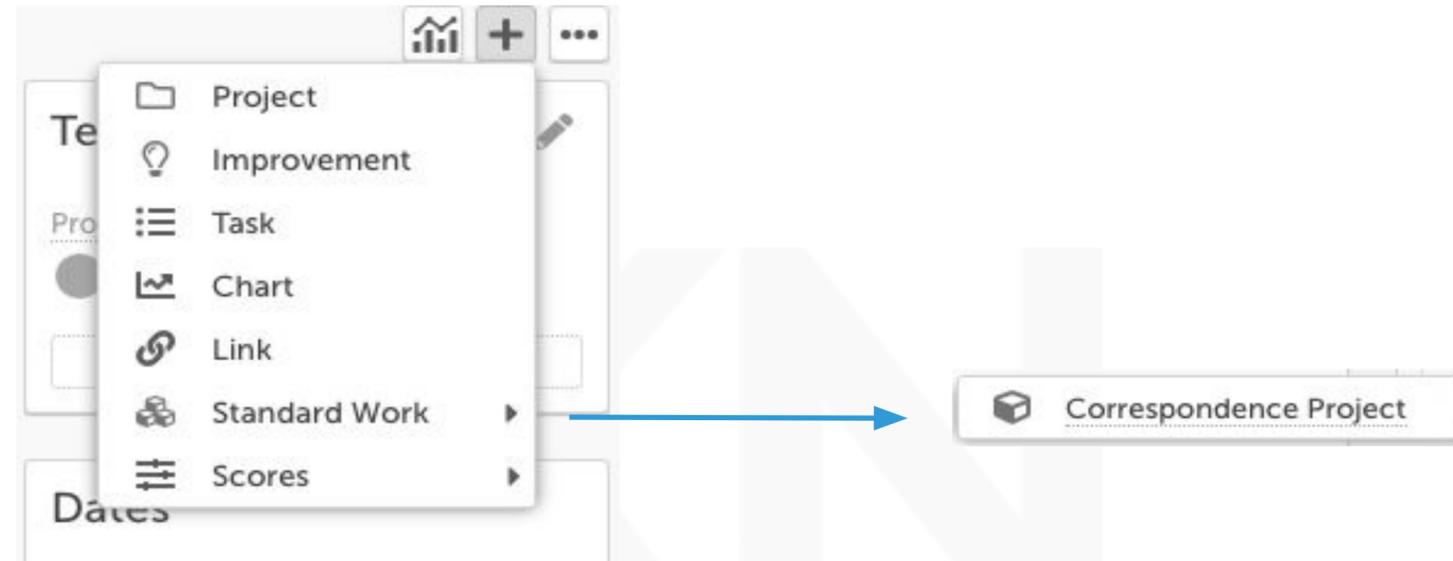
Activate Cancel

Nesting Items within Your Projects

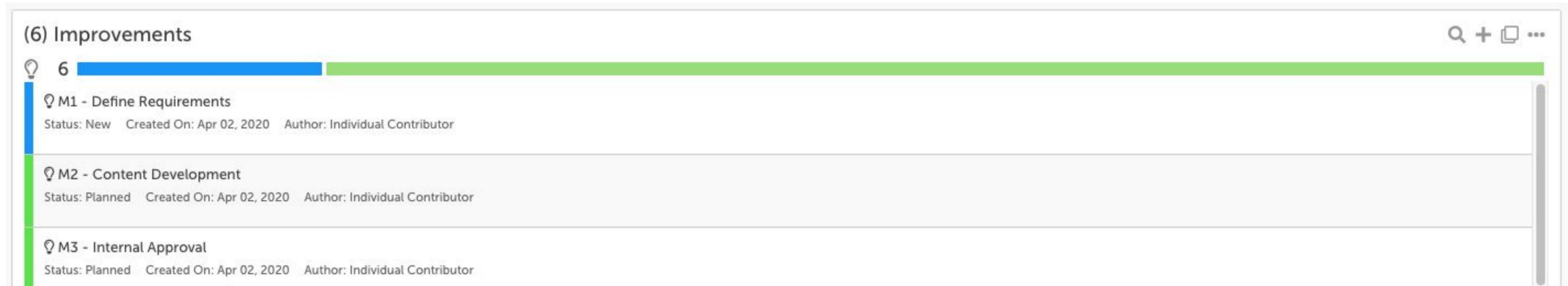
Nesting items allows you to show the relationships between Projects, Improvements, and Tasks. Use Standard Work to nest all Milestones under your project at once.

Nest Items under a Project:

- Click the + above Team
- Hover over Standard Work
- Select Correspondence Project



This creates 6 new Improvements nested within your Project - one for each Milestone. The first is in New status while the others are in Planned. Click the first to begin work.



Begin Work on Your First Milestone

Dependencies

See which items are dependent upon the completion of this item.

Activate

To activate this item, click Assign to assemble a team and determine a due date.

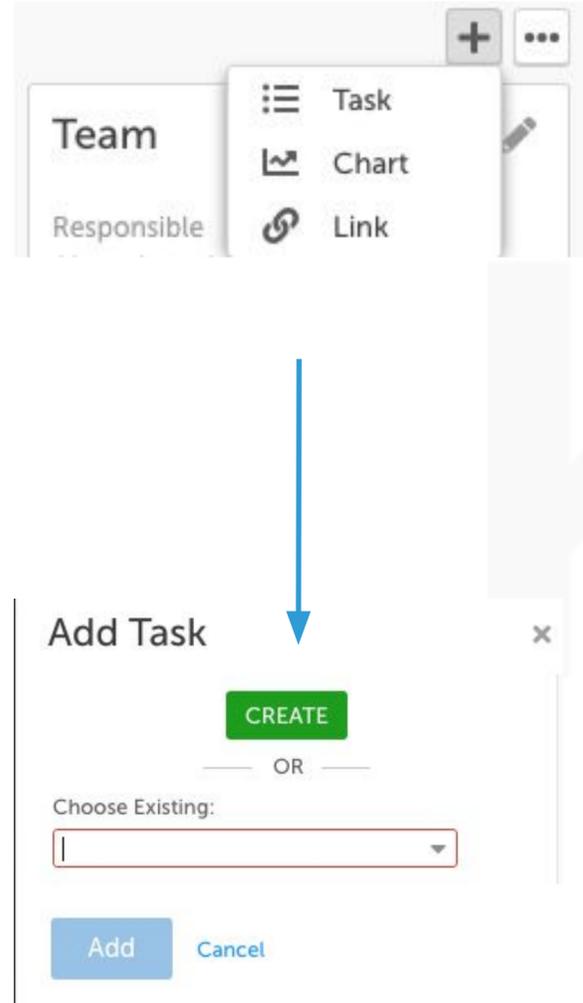
The screenshot displays a project milestone page for 'M1 - Define Requirements #595272'. At the top, a notification states that 'M2 - Content Development' is dependent on this item. Below this, there are tabs for 'All', 'Comments', 'Tasks', 'Charts', and 'Timeline'. The 'Details of Milestone' section shows the description as 'None' and the originating location as 'Magellan Healthcare'. A 'Dependencies' section shows a dependency from 'M1 - Define Requirements' to 'M2 - Content Development'. On the right side, a 'Team' panel is visible, showing the responsible person as 'Unassigned' with an 'Assign' button. Below this, there are options for 'Author' (Individual Contributor) and 'Follower' (KaiNexus Support). At the bottom right, a 'Dates' section shows the item was created on 'Apr 02, 2020'. A blue arrow points from the 'Dependencies' text to the dependency notification, and another blue arrow points from the 'Activate' text to the 'Assign' button.

Add Tasks to Milestones

Tasks

Break up this Milestone into smaller units of work using Tasks that can be assigned to yourself or others by clicking on the plus icon above the team.

Tasks can be added to Milestones AND to Projects.



Create Task

Title:
Meet with the team and go over requirements

Description:
Optional

Parent:
M1 - Define Requirements #595272

Make Private

▼ Status & Team
New Planned **Active** Deferred

Due Date:
Required

Author(s):
KaiNexus Support (Myself)

Responsible:
Required

Collaborator(s):
None

Follower(s):
None

Location(s):
Magellan Healthcare

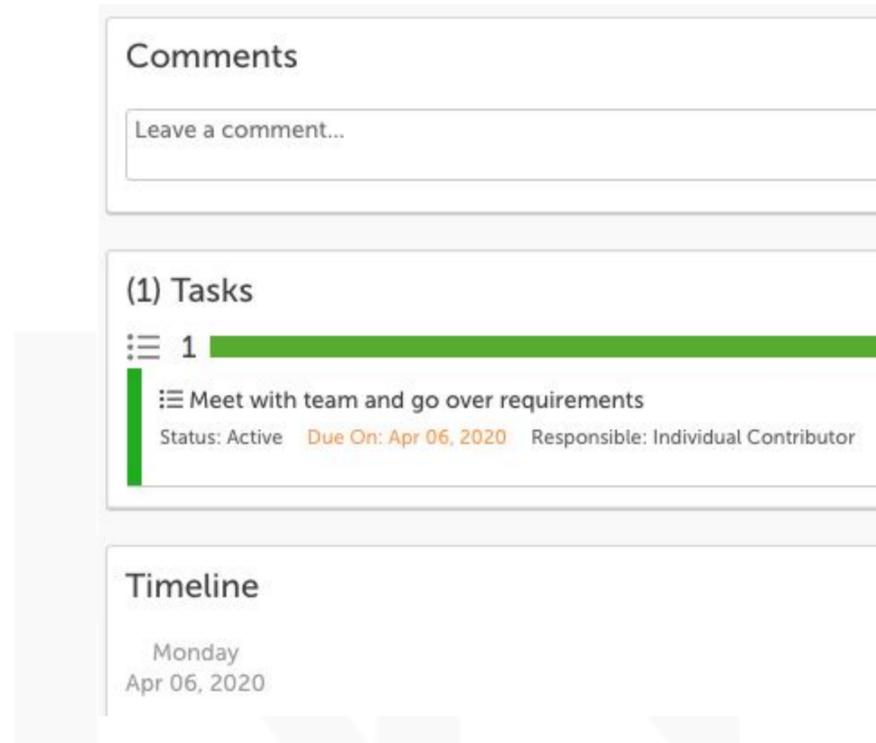
1. Enter a title (required) and description (optional)
2. Select Active from the Status options.
3. Pick a due date (required)
4. Pick a Responsible person (required)
5. Add a team (optional)
6. Click Create

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Create Save as Draft Cancel

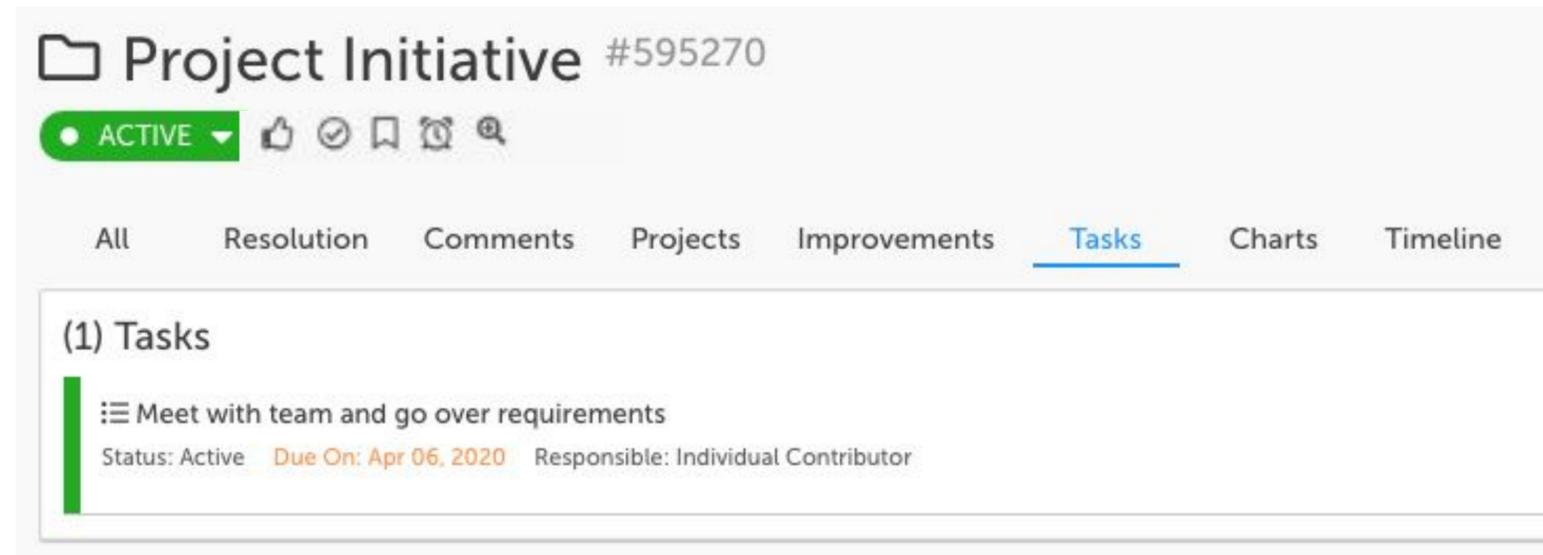
Find Tasks on Projects & Milestones

When you create a task, it'll appear in a new panel on the Milestone or Project.



This screenshot shows a task panel within a project or milestone view. It features three main sections: 'Comments' at the top with a text input field labeled 'Leave a comment...'; '(1) Tasks' in the middle, which contains a single task card for 'Meet with team and go over requirements' with a green progress bar, status 'Active', due date 'Apr 06, 2020', and responsible party 'Individual Contributor'; and 'Timeline' at the bottom, showing the date 'Monday Apr 06, 2020'.

To see all Tasks in a Project (including those from nested Milestones), click the Tasks tab in the Project's detailed view..



This screenshot shows the detailed view of a 'Project Initiative #595270'. At the top, there is a folder icon, the title 'Project Initiative #595270', and a green 'ACTIVE' status indicator with a dropdown arrow. Below this are several icons: a thumbs up, a checkmark, a bookmark, a calendar, and a magnifying glass. A horizontal navigation bar contains tabs for 'All', 'Resolution', 'Comments', 'Projects', 'Improvements', 'Tasks' (which is selected and underlined), 'Charts', and 'Timeline'. The main content area below the tabs shows '(1) Tasks' with a single task card for 'Meet with team and go over requirements', including its status, due date, and responsible party.

Document the impact of Projects

1. Click the Resolution tab in your Project

2. Click the blue Submit Resolution button

3. Select that your Project DID result in a change, and enter what that impact was.

You can add numerical values to impacts that deal with cost of time savings.

4. Click Complete to move your item into the Complete status.

5. Select who you want to notify about the completion of this Project by searching for individual people, or selecting entire locations

Project Initiative #595270

ACTIVE

This item's review date is: Apr 24, 2020 [Review](#)

All **Resolution** Comments Projects Improvements Tasks Charts Timeline

Resolution

Submit Resolution

Resolution

Did this result in a change? Yes No

Impact(s):

- Cost Avoidance
- Cost Savings
- Employee Time Savings
- Member Safety
- Member Wait Time Savings
- Member Satisfaction
- Quality Improvement
- Revenue Generation
- Staff Safety
- Staff Satisfaction

Review in the future? Yes No

Details

Complete

Submit for Approval

Save

Notify



Select the people and/or locations that you wish to notify
[What happens when I notify?](#)

People

Team

Digest

Search for Other People

Locations

Select All

Search for Other Locations

Complete