



PSPPCM007

Manage contracts

Assessment 3 of 5

Case study



Assessment Instructions

Task overview

This assessment task is divided into four [4] tasks. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Learning material
- Probity Principles – Contract Management
- Organisational Chart
- Start Up Checklist
- EMR Contract
- Communication Plan
- Risk Management Plan [from Assessment 2]
- Contract Management Strategy [from Assessment 2]
- Letter of Variation

Assessment Information

Submission

You are entitled to three [3] attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Case Study

This is a continuation of the Case Study in Assessment 2.

For this assessment, you will play the role of Jack Dean, the procurement officer of the Australian Department of Health.

After all the Contract Management team members received your email, they confirmed their understanding in regard to their roles and responsibilities.

Elaine Todd, the manager of the legal department, sent you an email requesting you implement the contract management strategy. In her email, she attached a Start Up Checklist. She specified that the team might have already completed some of these tasks, but she would like every task to be ticked off by the end of this week.

Task 1

- a) Your first task is to access the **Start Up Checklist** and fill it out by identifying a person responsible for each activity from the correct team [see **Organisation Chart**] and insert the dates. Do not tick the boxes as completed.

Assessor instructions: Students must fill out the Start Up Checklist. More detailed instructions for the assessor are included in each section of the **Start Up Checklist – Assessor Guide**.

- b) Now you will need to send an email to the team members you identified in the Start Up Checklist and explaining that they have been allocated tasks relevant to the contract and that they will need to send back the checklist by the end of this week.

Before you send the email, access the **Probity Principles – Contract Management** document and comply with them when networking with diverse stakeholders.

To write your email, use the template below.

[Approx. word count: 60 – 80 words]

Assessor instructions: Students must be able to locate and review the contract and fill out the table below.

Students' wording may vary, but their email needs to reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Students will need to insert all the team members they identified for each task in the Start Up Checklist.
From:	<<Add your name and position title here>>

	Jack Dean, Procurement Officer
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 10:30 a.m.
Subject:	<<Add the subject of the email here>> Start Up Checklist
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear team,

I hope this message finds you well. We are excited about the upcoming implementation of the contract with Clinic to Cloud for the new EMR system. To ensure a smooth transition, I kindly request your cooperation in completing the allocated tasks promptly.

Attached is the Start Up Checklist outlining the specific responsibilities assigned to each of you. We kindly ask you to review and complete the checklist and return it to me by the end of this week.

If you have any questions, feel free to contact me.

Regards,

Jack Dean

Procurement Officer

Regards,

<<Add your name here>>

<<Add your job position here>>

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Task 2

Elaine asked you to establish information and contractor and stakeholder communication strategies. To do so, you will need to access the **Communication Plan** template and fill it out following the instructions provided.

Your learning resources, as well as the information provided in the **EMR Contract**, can assist you in filling out the communication plan.

Assessor instructions: Students must fill out the Communication Plan Template using their learning material as well as the information provided in the EMR Contract. More instructions for the assessor are provided in each section of the **Communication Plan – Assessor Guide**.

Task 3

Case study

Clinic to Cloud send an email stating that the Head developer decided to pursue a different role for another organisation, and he will be part of the team for the next four weeks. The company has taken all the necessary actions to ensure a smooth transition, but this change will cause delays in the delivery of the additional Patient Engagement feature that the Head Developer was working on.

Elaine Todd mentioned that this now is a great risk for the organisation and needs to be taken into consideration as the risk level for the Patient Engagement Feature seems to be now higher than the initial rating.

Your task is to access and update the **Risk Management Plan you developed in Assessment 2** and adjust the risk level as per Elaine's suggestion and save it as **UPDATED – Risk Management Plan**.

You will also need to update the Contract Management Strategy – Appendix B and save it as **UPDATED Contract Management Strategy**.

Note: The updated Risk Management plan and the updated Contract Management Strategy will be part of your submission documents. The Contract Management Strategy will need to be updated after Task 4 e before submission.

Assessor instructions: Students must update their Risk Management Plan. One of the risks that was required to be identified was the Patient Engagement Feature. The rating for the Patient Engagement Feature should be either high or severe. The students will need to update Appendix B in the Contract Management Strategy as well.

Task 4

Case study

Elaine had a meeting with the senior managers as this was a concern from the very beginning. The senior managers were very disappointed and stated that they are very concerned about the project and they do not feel confident that Clinic to Cloud will be able to deliver what was agreed. They would like you to contact Clinic to Cloud to explain their concerns, as due to the inability to comply, the IT department will experience significant difficulties.

Note: Ensure you access Probity Principles and follow them when networking with diverse stakeholders and contractors throughout this task.

- a) Firstly, you will need to send an email to Bella Orlando, the Manager of IT and Communications, to discuss the issue and understand how the delay will affect them. Obtain their expertise in order to resolve the issue with Clinic to Cloud.

Use the template below.

[Approx. word count: 80 - 100 words]

Assessor instructions: Students must send an email to Bella Orlando, the Manager of IT and Communications, to discuss the issue and understand how the delay will affect them. Obtain their expertise in order to resolve the issue with Clinic to Cloud.

Students' wording may vary, but their email needs to reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Bella Orlando, Manager of IT and Communications
From:	<<Add your name and position title here>> Jack Dean, Procurement Officer
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> About the Patient Engagement Feature
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Bella,

I hope you're doing well. We've been informed of an unexpected delay in the delivery of the Patient Engagement Feature from "Clinic to Cloud," our contracted supplier.

As the Manager of IT and Communications, your expertise is vital in understanding how this delay may affect our department and the organisation.

Please share your insights on the potential impact this will have. Your input will be invaluable in resolving this matter effectively.

If you have any questions, feel free to contact me.

Regards,

Jack Dean

Procurement Officer

Regards,

<<Add your name here>>

<<Add your job position here>>

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Case study

Bella's Response:

Thank you for bringing this matter to my attention. The delay in the delivery of the Patient Engagement Feature from "Clinic to Cloud" could have several implications for our IT department:

1. **Operational Planning:** The delay might disrupt our scheduled implementation and testing processes, requiring us to reevaluate project timelines and adjust resource allocation accordingly.
2. **User Experience:** Our users were eagerly anticipating this feature, and the delay may lead to disappointment and queries from them. We need to proactively manage their expectations and provide suitable alternatives.
3. **Communication Strategies:** Any pre-planned communication regarding the feature's release will need revision to avoid misinformation and ensure transparency with our stakeholders.
4. **Resource Management:** The delay might affect our current project priorities, necessitating careful reallocation of resources to other ongoing projects.
5. **User Support and Training:** We may need to reschedule training sessions and provide additional support to users affected by the delay.

- b) Now, you will need to send an email to Emily Johnson, the authorised representative from Clinic to Cloud, explaining the concerns regarding their performance and asking to have a meeting to discuss the issue and the compliance with the contract terms.

Use the template below.

[Approx. word count: 80 - 100 words]

Assessor instructions: Students must send an email to Emily Johnson, the authorised representative from Clinic to Cloud, explaining the concerns regarding their performance and ask to have a meeting to discuss the issue and the compliance with the contract terms.

Students' wording may vary, but their email needs to reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> Emily Johnson, Clinic to Cloud
From:	<<Add your name and position title here>> Jack Dean, Procurement Officer
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> About the Patient Engagement Feature
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Emily Johnson,

I hope all is well. We have concerns regarding the performance of Clinic to Cloud as our contracted supplier for the Patient Engagement Feature.

The unexpected delay in feature development has impacted our operations and user experience. We request a meeting to discuss these concerns, understand the reasons behind the delay, and ensure compliance with the contract terms.

Your prompt response in scheduling the meeting would be highly appreciated.

If you have any questions, feel free to contact me.

Regards,

Jack Dean
Procurement Officer

Regards,

<<Add your name here>>

<<Add your job position here>>

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Case study

The meeting with Clinic to Cloud representatives was positive and informative. They carefully explained all the steps they have taken, and it was reassuring to know that they already have two potential candidates for the project. They assured us of being prepared before the Head Developer's departure and offered free technical support for the next three months to assist our IT team. However, they did inform us of a delay in the new feature's delivery, extending it by six weeks from the initial agreement.

- c) Send an email to the three [3] managers from the IT, Legal and Finance Department to inform them about what was discussed during the meeting using the template below.

[Approx. word count: 100 – 150 words]

Assessor instructions: Students must send an email to the three [3] managers from the IT, Legal and Finance Department to inform them about what was discussed during the meeting using the template below.

Students' wording may vary, but their email needs to reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> <i>Elaine Todd, Manager of Legal</i> <i>Bella Orlando, Manager of IT and Communications</i> <i>Peter Green, Manager of Finance</i>
From:	<<Add your name and position title here>> <i>Jack Dean, Procurement Officer</i>
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>>

	15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> About the Meeting with the Clinic to Cloud representatives
Attachments:	<<Add the name of any attachments here>>
Dear <<Add email recipient(s) name here>>, <<Add message here>>	
<p><i>Dear Elaine, Bella and Peter,</i></p> <p><i>I hope this email finds you well. I would like to provide a brief update on our recent meeting with Clinic to Cloud representatives.</i></p> <p><i>The meeting was positive and informative, and they outlined the steps they have taken thus far. We were assured by their readiness to handle the project, as they have already identified two potential candidates. Furthermore, they offered three months of free technical support to assist our IT team during the transition.</i></p> <p><i>However, I must inform you that there has been a delay in the delivery of the new feature. The implementation will now take an additional six weeks beyond the initially agreed timeline.</i></p> <p><i>If you have any questions, feel free to contact me.</i></p> <p><i>Regards,</i></p> <p><i>Jack Dean</i></p> <p><i>Procurement Officer</i></p>	
Regards, <<Add your name here>> <<Add your job position here>>	
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- d) Now you will need to send a separate email to Peter Green, the Manager of Finance, to let him know that the Finance Department will receive an updated invoice that will exclude the cost of the technical support for the next 3 months.

Use the template below.

[Approx. word count: 40 - 60 words]

Assessor instructions: Students send a separate email to Peter Green, the Manager of Finance, to let him know that the Finance Department will receive an updated invoice that will exclude the cost of the technical support for the next 3 months.

Students' wording may vary, but their email needs to reflect the content in the sample answer provided below.

Email Template

To:	<<Add name(s) and position title of main email recipients here>> <i>Peter Green, Manager of Finance</i>
From:	<<Add your name and position title here>> <i>Jack Dean, Procurement Officer</i>
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> <i>15.04.23, 11:30 a.m.</i>
Subject:	<<Add the subject of the email here>> <i>New invoice</i>
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

Dear Elaine, Bella and Peter,

I trust this email finds you well.

I am writing to inform you that "Clinic to Cloud" will be sending the Finance Department an updated invoice that excludes the cost of technical support for the next three months.

If you have any questions, feel free to contact me.

Regards,

Jack Dean

Procurement Officer

Regards,

<<Add your name here>>

<<Add your job position here>>

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- e) Develop a letter of variation to be sent to all stakeholders using the **Letter of Variation** document found in your resources. And then update the contract variation section in the **UPDATED Contract Management Strategy**.

Assessor instructions: Students need to develop a letter of variation to be sent to all stakeholders using the Letter of Variation document found in their resources. Then they need to update the contract variation section in the UPDATED Contract Management Strategy. In the Letter Variation under Contract Variations, students will need to specify the change in the delivery of the Patient Engagement Feature.

More instructions on how to fill out the letter of variation can be found in the **Letter of Variation – Assessor Guide**.

The variation section details can be found in the **Contract Management Strategy – Assessor Guide**.

Assessment checklist:

Students must have completed all four [4] tasks within this assessment before submitting. This includes:

1	Four [4] tasks are to be completed in the spaces/format provided.	<input type="checkbox"/>
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Congratulations, you have reached the end of Assessment 3!

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