CGS ADMINISTRATORS, LLC

THE PROVIDER 360 PROGRAM

ACTION PLAN TEMPLATE

An **Action Plan** is a detailed plan that lists the actions, responsible owner, due dates, and status required to implement solutions and ensure follow-through. Use an Action Plan after root causes and countermeasures are identified. It ensures accountability and tracks progress during implementation.

Instructions

Step 1: Assign a Reference Number

Give the issue a simple, unique tracking number. Use a sequential format (e.g., 001, 002, 003). This keeps all issues traceable throughout the project.

Step 2: Classify the issue so it's easy to group and analyze

Common Lean categories include: Process Defect, Delay/Waiting, Rework, Communication Gap, Missing Standard Work, Equipment/System Issue. Enter a type that best matches the issue.

Step 3: Describe the Issue to Resolve

Write a clear, concise problem statement. Describe what is happening (the symptom). Avoid explaining why it's happening yet. Keep it factual and measurable when possible.

Example: "Provider did not send the signed written order."

Step 4: Define the Action Needed to Resolve the Issue

List the corrective action that will eliminate or reduce the root cause. Be precise about what will be done. Describe the improvement activity (training, process update, SOP creation, etc.). Ensure the action directly addresses the root cause.

Example: "Create and publish a standardized file-upload SOP with step-by-step instructions."

Step 5: Identify the one primary owner who will ensure the action is completed

This person may collaborate with others, but only one name should be listed. Choose the role best connected to the action.

Example: "John Doe (Process Lead)".

Step 6: Enter a realistic deadline for completion

Consider workload, dependencies, and required resources. Lean favors short cycles—avoid long, open-ended timelines.

Example: "06/18/2026"

Step 7: Choose the current progress state

Typical statuses: Not Started, In Progress, Completed, On Hold, Escalated. Update regularly to keep the action plan alive and useful.

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Reference Number	Issue Type	Issue to Resolve	Action Needed to Resolve Issue	Who is Responsible for Handling *(List only one person)*	Due Date	Status
1	People	Not receiving the necessary documentation from the provider.	Build strong working relationships with providers, focusing on one provider at a time.	John Doe	MM/DD/YYYY	In Progress

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