



EHR Project Management - Introduction

The purpose of this document is to give an overview of project management and discuss tools that will help keep an EHR project organized.

Project Manager

The role of a Project Manager is generally a full-time job; it cannot be accomplished in someone's spare time. Success requires focus on numerous activities connected to an EHR implementation. Industry literature is filled with stories of EHR system failures directly linked to insufficient project leadership; the pivotal role in this is a supported, resourced Project Manager.

The practice's Project Manager is given the complex and difficult task of managing the vendor relationship and responsibilities, and implementing a critical system with practice personnel. The Project Manager must be given the time, resources, respect, and authority necessary to carry out the important responsibilities. The Project Manager alone cannot guarantee the success of the EHR implementation without the full support of a strong *Clinical Champion* and the full backing of the practice leadership.

A critical structural support to the Project Manager's role is that of key stakeholders who assemble as a *Steering Committee*. These individuals have significant interest in the EHR implementation, and set the vision, strategic direction, and guidelines for the project. Typically, the Steering Committee is comprised of 3-4 individuals who act as a governing body for the project, providing direction, maintaining focus on strategic directives, resolving major conflicts, and setting priorities. These higher-level guidelines are then translated into work and support for the Project Manager.

The Project Manager is the main communicator for the project and organizes face-to-face meetings with the following groups:

- Implementation team
- Vendor
- Steering Committee
- Staff

Scope Change

The organization leadership sets the implementation strategy and project scope. As the project progresses, the EHR capabilities and the systemic impacts become clearer. During this time, requests to modify or expand the scope of implementation are common. New functionality not previously planned during initial implementation, new users or sites not included in the initial plan, customization to the software features and functions, and new interfaces all seem logical and possible. Additionally, unintended consequences and unforeseen challenges (e.g., medical/legal compliance issues, erroneous information/assumptions during planning) become apparent and require modification.

Documentation for a *scope change request* should include the following information:

- A statement of specific changes requested
- Justification as to why this change is necessary
- What is the workaround if the scope change cannot be accommodated
- What is the estimated requirements to incorporate this change into the current scope
 - Resources
 - Time
 - Budget
 - Other criteria such as facility changes, additional end-user training requirements, job modification, etc.

The Project Manager and Clinician Champion sign-off on the estimated requirements and present documentation to the steering committee for approval.

The steering committee should meet as a group to review the submitted requests and determine if the scope change is warranted taking into consideration the project timeline, unanticipated implementation challenges, and the urgency of the need relative to other system changes, along with the viability of other alternatives.

Status Reports

Project status reports serve as a good method for communicating progress and issues to the full practice and other interested parties. A status report should provide a written summary of the following:

- Current status of the project: Is it on time, within budget, and in-scope? What are the key accomplishments?
- Major issues and risks: Have any changes in scope occurred? Is there an action plan documenting what is going to be done, by whom, and when to mitigate the issue or risk?
- Upcoming Milestones: What is expected to be completed between the time of this report and the next scheduled status report?

Project Risks

Show Stoppers – High-priority issues that prevent go-live.

Scope Creep – Expanding the project scope until it is no longer on-time and/or within budget.

Documentation Tools

Using a tool to document the decisions that are made will help guide the project without losing site of the initial goals and monetary restraints. Creation of a project plan and consistent use of an issues list will provide the direction and structure for tracking and maintaining momentum of a project. This will also make it easier to provide status reports.

WIREC can provide project management documentation templates for:

- Project Plan
- Issues List
- Meeting Agenda
- Meeting Notes
- Guidelines for Effective Meetings
- Project Management for a Successful EHR Implementation
- Team Roles and Responsibilities
- Project Change Committee Charter
- Communication Plan
- Project Change Log