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Assembling the Right EHR Project Team

The purpose of this document is to describe the critical roles that must be filled by key members of your EHR project team and to provide a general estimate of the time involvement required.

The selection and implementation of your EHR system will have major financial and clinical impacts on your practice for years to come. Therefore, it is important to involve the "brightest of the bright" from your management and staff. Unfortunately, all of these key resources are usually the same individuals your practice heavily relies upon for other duties and are likely already overcommitted. Your practice needs to creatively and carefully plan the best ways to "backfill" the other day-to-day responsibilities of these individuals for a period of time—allowing them to dedicate significant time to the evaluation, selection, and implementation of the best EHR system for your practice.

1. **A "Clinical Champion"** with the responsibility for establishing the big picture plan for the EHR system and for leading clinicians in template, clinical workflow, standardized documentation and other decisions necessary to select and implement the best possible EHR system.

   Skills, Knowledge & Attributes:
   - A visionary leader who is able to see the broader, future blueprint of the EHR system while also understanding that multiple, interim steps will be needed to reach that ideal.
   - Respected clinical leader who can rally clinicians to participate and can facilitate clinician consensus.
   - Strong desire to standardize clinical documentation and processes, and a willingness to lead the effort to make these changes happen.
   - Has sufficient time to devote to this effort.

   Time Commitment:
   - 20% during the 3–4 months of EHR system selection to facilitate clinical requirements decisions and participate in demonstrations, reference calls and site visits.
   - 30% during the initial 3 months of implementation to finalize template, clinic workflow, standard medical mnemonics and other clinical decisions necessary for system setup.
   - Up to 50% during the initial month of live system use to support and encourage clinicians in effectively using the system.

2. **An EHR Project Manager** with the responsibility for coordinating, facilitating and serving as "task master" to assure all vendor and practice tasks are completed accurately and on time.

   Skills, Knowledge & Attributes:
   - Excellent understanding of your specific practice processes, workflows and constraints.
   - Enthusiastic supporter of change.
   - Highly organized, analytic thinker capable of effectively juggling multiple, high priority tasks.
   - Effective communicator and task master.
   - Proficient with office and PC applications with no timidity with technology.
   - Respected by practice clinicians and staff.
   - Has sufficient time to devote to project responsibilities.

   Time Commitment:
   - No less than 75% for the full evaluation, selection and implementation period (10–12 months if full EHR features are implemented).
   - 100% at key milestone dates.

3. **Evaluation & Selection Team Members** with the responsibility for identifying and prioritizing all system requirements within the practice and effectively evaluating the capabilities of vendor products for meeting these requirements. The team needs to include individuals who can knowledgeably represent the system needs for:
- Physicians & Mid-Levels
- Nursing
- Medical Assistants
- Office Front Office Administration
- Billing
- Medical Records
- Processing of Ancillary Orders, Pharmacy Refills & Referrals

The Selection Team need not be larger than 3–4 individuals as long as all areas are knowledgeably represented.

Skills, Knowledge & Attributes:
- Enthusiastic and open to change.
- Knowledgeable in their areas within your practice.
- Analytical thinkers.
- Comfortable with the use of computers and technology.
- Have sufficient time to devote to project responsibilities.

Time Commitment:
- 25% during the initial month of requirements definition, the demonstration period, reference verifications and site visits.

4. **Design & Testing Team Members** need to have a full understanding of your practice operations and intended workflow and processes with the new system. This team is typically small (1–2 individuals) with some support by all key users within the practice for final testing and verification.

Skills, Knowledge & Attributes:
- Knowledgeable at a very detailed level for many areas within your practice.
- Analytical, detailed workers with a high drive for accuracy.
- Highly capable computer users.
- Have sufficient time to devote to project responsibilities.

Time Commitment:
- 50% for 2–3 months of design, build and testing phases of implementation.

5. **Hardware Implementation & Testing Team Members** are responsible for assuring all hardware, equipment, tools and security are implemented and working effectively. Often an outside contractor is employed to assume these responsibilities under the leadership of the Project Manager.

Skills, Knowledge & Attributes:
- Experienced in network design and communication for the specific network you will be using.
- Knowledgeable of new technology and input devices.
- Thorough, detailed worker.
- Readily available for on-going support as needed.
- Able to communicate effectively with system users at all levels of technical sophistication.

Time Commitment:
- 50% during equipment implementation and testing. Duration will depend on amount of equipment and technical infrastructure changes.
- 100% for the final full system testing and the initial weeks of live production to troubleshooting and support.

6. Training Team Members are responsible for assuring all users understand how to effectively use the system. This position is responsible for tailoring vendor training materials for your specific office use, coordinating initial vendor training and serving as a key point of system knowledge and training of new employees once the system is in live use.

Skills, Knowledge & Attributes:
- Experienced with all business areas within the practice.
- Effective communicator with good training skills and attitude.
- Capable computer user.
- Has sufficient time to devote to project responsibilities.

Time Commitment:
- 15% during building & testing to work with vendor on tailoring training materials and approach.
- 100% during final user training and during the first weeks of live use to support system users in effectively using the system.

A Final Note:

It is important to remember that each of the roles outlined above does not necessarily represent separate individuals. In a smaller office environment, many of these roles are played by 2–3 individuals. In larger practices many more individuals will participate. When an individual is assuming multiple roles within the project, it is critical to keep aware of the time commitment requirements and be realistic when planning your selection and implementation timelines.