Roles & Responsibilities

A guide to human resource planning and harnessing appropriate skills for your EMR implementation

Contents

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1.0 Overview

This Guide contains information about the different roles and responsibilities you will need to consider in planning the transition to your new EMR. It explains why the assignment of specific roles and responsibilities is important, what roles and skills are needed, and who should participate in the planning.

Within the context of the EMR project, roles and responsibilities assignment is about planning human resources and harnessing the appropriate skills for the upcoming implementation and adoption of the new EMR. Role assignment is a critical component of overall project planning, and is usually completed by the project manager in consultation with the relevant stakeholders such as clinical champions, providers, clinical support and members of the AOHC EMR Project Team.

The ultimate aim is to ensure that the right person, with the right skills, is addressing the right sets of activities in preparing for and achieving a successful EMR implementation

Roles and responsibilities should be assigned early, according to the nature and scope of the project, and the gaps identified in your Business and Technical Needs and Data Analyses.

2.0 Why assign roles and responsibilities?

A well thought-out plan on the required human resources and skills will help ensure your project success. Sharing the list of assigned roles and responsibilities will let everyone involved in the project know who will do what. Questions or concerns related to the project will be properly channelled to the appropriate person(s). This will ensure individual accountability and positively affect project management and communications within your organizations.

3.0 What roles and skills will be needed?

Below is a summary of the activities that will be required, and a list of the key roles and their responsibilities. We have also provided some of the required skills for each role to assist you in assigning the right people to the right roles. Depending on the size and structure of your centre, you may wish to have the same person fill multiple roles.

Use the Skills Matrix to drill down to the specific set of skills required for each identified role.

Use the Roles and Responsibility tool to document who is assigned to each task, and share the information with the project team. Print the completed tool, or save it with your other project documentation.

TOOLS & TEMPLATES	Roles & Responsibilities Assignment Tool Skills Matrix

It is important to remember that assigning new responsibilities may shift existing roles, at least temporarily. You may wish to develop an initial assignment plan for broader discussion with your team and consider whether you will need to backfill some key positions.

Before you begin, you should review the findings of the needs analyses to ensure that you have a good understanding of the identified gaps and what is needed for the project.

Your organization's decision-maker should review and sign-off or approve the final plan.

4.0 What are the activities we will be engaging in?

Project Management
These are the tasks involved with making sure that all of the activities necessary for a successful implementation are properly planned, managed and executed in a timely manner.

TOOLS & TEMPLATES	Project Management Basics

Communications
It is important to start communicating early and often with all of your stakeholders: clinicians, other staff, clients, board members, etc. A communications plan will help you keep track of what needs to be shared, and with whom.

TOOLS & TEMPLATES	Communicating with Stakeholders Communications Planning Template

Transition Management
Critical work that focuses on the people side of change; this ensures that all participants are supported throughout the transition.

TOOLS & TEMPLATES	Transition Guide

Workflow Impact

Your organization will need to assess the business processes that may be affected by the new EMR, and make changes as required.

TOOLS & TEMPLATES	Workflow Integration Guide

Data Migration

You may need to review and 'cleanse' the data in your current CMS before using it to populate the new solution. Validating the migrated data in the new EMR will be a key activity.

TOOLS & TEMPLATES	Data Preparation Guide
	Data Migration Guide

Training

Attending training sessions, or committing to use the eLearning tools provided, will ensure that everyone using the new EMR starts off on the right foot. Each centre will also identify a super user to receive in depth training and become in-house experts and trainers in EMR use.

TOOLS & TEMPLATES	Training Plan Template

Finance and Agreements

The cost share for each centre's EMR Maintenance and Support and other IMS Program services is determined annually using an apportioning factor calculated by a subset of the centre's annual budget. This activity is tied to a Participation Agreement and the EMR Services Agreement and would anticipate involvement by individuals responsible for the preparation of budgets, financial related agreements and payments.

TOOLS & TEMPLATES	IMS Program Services Apportioning Guide
	IMS Apportioning Template

5.0 Primary Project Roles

Executive Project Sponsor	Accountable for the overall success of the project, the executive sponsor assigns the project manager.	*Together, the Executive Project Sponsor and Project Manager will identify members of the organization's project team.*
Project Manager	Typically a senior manager experienced in leading multi-faceted implementation teams, the project manager makes EMR implementation decisions on behalf of the centre, and is responsible for day-to-day management of EMR system implementation for the duration of the project.	
Project Team	The project team works on all aspects of EMR implementation focusing on the following areas: ▪ Budget/agreement management ▪ Business change ▪ Information technology management ▪ Privacy and security ▪ Communications ▪ Data migration ▪ Training ▪ Reporting. Depending on resource skill set, availability and EMR implementation complexity, one person may fulfill multiple roles. The key consideration is the time and effort each role requires to ensure overall project success.	

It is important to note that while an individual can play more than one role, there should be at least one individual assigned to each of these roles

Executive Project Sponsor
- Has the authority and enthusiasm to lead the organization through change
- Has ultimate responsibility for change implementation and ensures that sufficient human and financial resources are allocated to the change
- Is a "role model" for change and takes an active interest in ensuring and sustaining ongoing progress
- Ensures the speedy resolution of issues escalated by the Project Manager

A good sponsor understands and supports the need to change, and displays a strong personal commitment to change. As necessary, the sponsor will engage staff and other stakeholders to confirm the organization's support for change.

Project Manager
- Acts as the primary liaison for all teams associated with the project
- Manages overall implementation activities
- Works with the AOHC Project Team to develop and manage project plans

- Manages and resolves risks and issues in conjunction with the AOHC Project Team and/or Executive Project Sponsor
- Coordinates change management activities to ensure staff are supported in successfully using the new EMR in their daily work
- Supports knowledge sharing and adoption

Characteristics of a good project manager include attention to detail, good organization, and an ability to lead and inspire others.

Clinical Champions

- Are clinicians who will be EMR users, promoting meaningful use and best practices
- Are the enthusiasts and early adopters of change – they are convinced about the value of the change and they want the organization and its people to succeed with the change
- Act as Ambassadors and advocates of eHealth and the use of the Electronic Medical Records in general
- Can answer simple questions, address concerns, and participate in key meetings around the implementation of the new EMR

A good champion is a respected leader in the center, department or organization, and can comfortably and credibly speak with people about the impact of change. Champions can wear multiple hats as needed to act as a driver, motivator, enabler and tutor.

Super user

- Is knowledgeable about the clinical workflows and processes in place in the centre
- Has the interest and capacity to undergo advanced training, including 'train the trainer'
- May also be a Clinical Champion
- Willing to act as a trainer for new staff and/or to provide 'refresher' training to existing staff

An effective super user can relay knowledge of the EMR capabilities to new users, and coach others on how to maximize their use of the solution.