# Tool 1.1: E-Prescribing Team Roster

Successful e-prescribing implementation is a team sport. Like any team, the e-prescribing team has certain roles or positions that need to be filled. This roster explains the key roles in stand-alone e-prescribing or electronic health record (EHR) implementation. Filling out the appropriate parts of the roster should prompt you to identify and involve the right people at each stage of the implementation process. While the team roster should be completed in the early stages (Chapter 1) of this process, the implementation leader should revisit the team roles periodically, especially after assessing readiness (Chapter 3), to ensure that the right team members are included.

In larger organizations, your team may consist entirely of your practice’s members and employees. In smaller organizations, some important roles may be filled by outside consultants or support personnel. For many practices, one person may fill multiple roles; in other cases, there may be multiple people filling the same role.

## The Core Team

The implementation process should be initiated and driven by a core team that includes people in each of the following roles. This nucleus of people will carry out the tasks needed in the *planning* phases of implementation (Chapters 2-7), and in the later stages of implementation (Chapters 8-11), the latter of which may include supervising a larger team composed of technical support and training personnel.

Table : Roles and Responsibilities of the Core Team

| **E-Prescribing or EHR Implementation Leader**   * + - **Role**: Has overall responsibility for the e-prescribing or EHR project and is typically selected by the executive sponsor. This person should have authority over project resources (e.g., equipment purchase, hiring or firing consultants).     - **Tasks**:       * Builds and leads implementation team       * Leads negotiation of goals with executive or owner stakeholders       * Develops and oversees plans for project financing       * Approves work of the implementation team, including system requirements, system selection, process changes, and implementation plan       * Provides support to the project manager by escalating issues to vendor or internally for resources or funding       * Evaluates project status from a management perspective       * Regularly assesses or reviews milestone achievements | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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| **Physician Champion**   * + - **Role**: Communicates the goals/benefits of e-prescribing and best practices for using e-prescribing to other providers in the office and represents prescribers in the planning and implementation processes. Should be committed to the project and its success, a recognized leader and available to participate in all team activities.     - **Tasks**:       * Ensures buy-in from other providers in negotiating goals       * Represents other providers in assessing readiness, process redesign, and system selection       * Provides physician consultation during the implementation       * Helps set and maintain appropriate physician expectations before and after implementation       * Participates in evaluation of implementation towards meeting office goals | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

Core Team (continued)

| **Implementation Project Manager**   * + - **Role**: Manages the project, leads team meetings, identifies potential issues, and coordinates activities internally and with the vendor. This is a role best filled by an internal resource person with project management experience (possibly an office manager) or an outside consultant.     - **Tasks**:       * Develops the project plans and project timeline       * Identifies tasks and available resources to do the work for each task       * Assigns responsibility for tasks to individuals       * Monitors progress on tasks and progress on the timeline       * Manages project issues and project constraints that develop       * Coordinates communications within the office and among the vendors       * Coordinates demos, site visits, phone calls, travel arrangements       * Documents meeting notes, phone call conversations, decisions made, action items and follow-up       * Coordinates implementation activities with the vendor       * Follows project management principles to keep the activities aligned with goals       * Coordinates contract negotiations       * Works closely with the physician champion and executive sponsor       * Leads the project team meetings | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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## The Stakeholders

Stakeholders represent a separate group of roles from the core implementation team. Stakeholders need to be involved in key decisions but may often be too busy with other supervisory duties to carry out the tasks needed to drive the implementation process. It is crucial for the core team to identify leaders who can represent each of the key practice constituencies and to involve them in key decisions at every step.

Table : Roles and Responsibilities of the Stakeholders

| **Executive Sponsor(s)**   * + - **Role:** This person should be the CEO, owner, or key decision maker who has the authority to fund and/or cancel the project. In smaller offices this person may also be the implementation leader.     - **Tasks:**       * Provides input on goals and signs off on final project goals       * Meets occasionally with the implementation leader | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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| **Nursing Representative**   * + - **Role:** Should be knowledgeable and trusted. Should have a deep understanding of the processes required to deliver healthcare within the office, especially the new and renewal prescription processes. Should be aware of the practice’s clinical needs and shortcomings.     - **Tasks:**       * Provides input in e-prescribing goals negotiations       * Provides input and nursing perspective in defining work processes and system functionality requirements       * Provides clinical consultation from a nursing perspective during the implementation       * Helps set and keep nurses expectations before and after implementation       * Participates in evaluation of implementation | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Other Stakeholders**  The need to bring other stakeholders into the e-prescribing planning process will depend on the nature of the practice and the individuals who might be seen as leaders or representatives of personnel constituencies. Larger offices are likely to have more of these constituencies. Other stakeholders to consider include:   * + Medical assistant   + Medical records lead   + Billing office representatives   + Quality improvement representative   + Ancillary area representatives   + In-house pharmacy, if any   + Hospital IT   + Network/technical analyst   + Other lab, other nurses, other support staff | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

## Additional Post-Selection Team Members

Once a specific e-prescribing system has been selected and a contract signed, the implementation team will need to expand as the office moves beyond planning to system set-up, training, and implementation of new work processes, and system launch.

Table : Roles and Responsibilities of Additional Post-Selection Team Memebers

| **Super Users**   * + - **Role:** A super user is someone who is the resident expert in using the system. This person should be the first person trained for each role.     - **Tasks:**       * Tests and documents results and workarounds       * Trains new users or others as needed       * Serves as the internal support       * Performs multiple roles within the office | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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| **IT Staff**   * + - **Role:** Works with the team and vendor to ensure that the implementation accounts for any technical considerations, including 1) hardware, 2) software interface with the practice management system, and 3) system testing.     - **Tasks:**       * Works with the vendor regarding PMS integration planning       * Identifies any issues related to hardware implementation and compatibility       * Supports training       * Works with the vendor to understand new hardware maintenance/warranties | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **Trainer**   * + - **Role:** In many cases, this role may be filled by the system vendor, but practices also frequently need to go beyond what the vendor offers. Super users may also be trainers.     - **Tasks:**       * Works hand-in-hand with the vendor       * Is knowledgeable about all aspects of the system       * Is current with any upgrades and their limitations or work-arounds       * Can train new users on basic system usage | Candidates:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |