

## **Health IT Workforce Roles and Competencies**

### **Categories of Health IT Workforce Roles Requiring Short-Term Training**

#### Mobile Adoption Support Positions

These members of the workforce will support implementation at specific locations for a period of time, and when their work is done, will move on to new locations. Workers in these roles might be employed by regional extension centers, providers, vendors, or state/local public health agencies, and would work together in teams.<sup>1</sup> Preparation for this set of roles will typically require six months of intense training for individuals with appropriate backgrounds.

#### **1. Practice Workflow and Information Management Redesign Specialist**

##### General Description

Workers in this role assist in reorganizing the work of a provider to take full advantage of the features of health IT in pursuit of meaningful use of health IT to improve health and care.

##### Suggested Background

Individuals in this role may have backgrounds in health care (for example, as a practice administrator) or in information technology, but are not licensed clinical professionals.

##### Competencies

Workers in this role will be able to:

- Document the workflow and information management models of the practice.
- Conduct user requirements analysis to facilitate workflow design.
- Develop revised workflow and information management models for the practice, based on meaningful use of a certified EHR product. Revised models will anticipate implementation of:
  - General practice automation (e.g. appointment scheduling) to the extent not yet implemented
  - Electronic documentation and results review
  - Computerized Provider Order Entry (CPOE)
  - Clinical decision support (CDS)
  - Health information exchange to include:
    - Sending of lab orders and receipt of results using CPOE
    - Quality improvement and reporting
    - E-Prescribing
  - Other EHR functionalities as required by the Stage 1 Meaningful Use definition for 2011 and its evolution into Stage 2 in 2013 and Stage 3 in 2015.
- As the practice implements the EHR, work directly with practice personnel to implement the revised workflow and information management model.
- Working with practice staff, develop a set of plans to keep the practice running if the EHR system fails.

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<sup>1</sup> In this document, “practice” is used as a shorthand notation to refer to multiple employment settings, such as regional extension centers, providers, vendors, or state/local public health agencies.

- Working with practice staff, evaluate the new processes as implemented, identify problems and changes that are needed, and implement these changes.
- Design processes and information flows for the practice that accommodate quality improvement and reporting

## **2. Clinician/Practitioner Consultant**

### General Description

This role is similar to the “Practice Workflow and Information Management Redesign Specialists” role listed above; in addition to that role’s set of competencies, this role brings to bear the background and experience of a professional licensed to provide clinical care or a public health professional.

### Suggested Background

Individuals in this role will be licensed clinical or public health professionals; or in the case of public health, they would bring into the role significant experience in federal, state or local public health agencies.

### Competencies

In addition to the activities noted above for the “Practice Workflow and Information Management Redesign Specialist” role, workers in this role will be able to:

- Analyze and recommend solutions for health IT implementation problems in clinical and public health settings, bringing clinical expertise directly to bear.
- Advise and assist clinicians in taking full advantage of technology, enabling them to make best use of data in electronic form, including data in registries, to drive improvement in the quality, safety and efficiency of care.
- Assist in selection of vendors and software by helping practice personnel to ask the right questions and evaluate the answers they receive.
- Advocate for users’ needs, acting as a liaison between users, IT staff, and vendors.
- Ensure that the patient/consumer perspective is incorporated into EHR deployments and that full attention is paid in the deployment to critical issues of patient privacy.
- Train practitioners in best use of the EHR system, conforming to the redesigned practice workflow.

## **3. Implementation Support Specialist**

### General Description

Workers in this role provide on-site user support for the period of time before and during implementation of health IT systems in clinical and public health settings. These individuals will provide support services, above and beyond what is provided by the vendor, to be sure the technology functions properly and is configured to meet the needs of the redesigned practice workflow.

### Suggested Background

Individuals training for this role will have a general background in information technology or health information management.

### Competencies

Workers in this role will be able to:

- Execute implementation project plans, by installing hardware (as needed) and configuring software to meet practice needs.
- Incorporate usability principles into software configuration and implementation
- Test the software against performance specifications.
- Interact with the vendors as needed to rectify technical problems that occur during the deployment process.
- Proactively identify software or hardware incompatibilities.
- Assist the practice in identifying a data back-up and recovery solution, and ensure the solution is effective.
- Ensure that the mechanism for hardware/software recovery (e.g., data backup or redundant systems) and related capabilities are appropriately implemented to minimize system downtime.
- Ensure that privacy and security functions are appropriately configured and activated in hardware and software.
- Document IT problems and evaluate the effectiveness of problem resolution.
- Assist end users with the execution of audits.

## **4. Implementation Manager**

### General Description

Workers in this role provide on-site management of mobile adoption support teams for the period of time before and during implementation of health IT systems in clinical and public health settings.

### Suggested Background

Workers in this role will, prior to training, have experience in health and/or IT environments as well as some administrative or managerial experience.

### Competencies

Workers in this role will be able to:

- Provide leadership ensuring that implementation teams, consisting of workers in the roles described above, function cohesively.
- Apply project management and change management principles to create implementation project plans to achieve the project goals.
- Interact with diverse personnel to ensure open communication across the end-users and with the support team.
- Lead implementation teams consisting of workers in the roles described above.
- Manage vendor relations, providing schedule, deliverable, and business information to health IT vendors for product improvement.
- Coordinate implementation-related efforts across the implementation site and with their Health Information Exchange partners, troubleshooting problems as they arise.
- Apply to these activities an understanding of health IT, meaningful use, and the challenges practice settings will encounter in achieving meaningful use.

## Permanent Staff of Health Care Delivery and Public Health Sites

These roles are needed for ongoing support of health IT that has been deployed in office practices, hospitals, health centers, long-term care facilities, health information exchange organizations and state and local public health agencies. Preparation for this set of roles will typically require six months of intense training for individuals with appropriate backgrounds.

### **1. Technical/Software Support Staff**

#### General Description

Workers in this role will support on an ongoing basis the technology deployed in clinical and public health settings. Workers in this role maintain systems in clinical and public health settings, including patching and upgrading of software. They also provide one-on-one support, in a traditional “help desk” model, to individual users with questions or problems.

#### Suggested Background

Individuals training for this role will have a general background in information technology or health information management.

#### Competencies

Workers in this role will be able to:

- Interact with end users to diagnose IT problems and implement solutions.
- Document IT problems and evaluate the effectiveness of problem resolution.
- Support systems security and standards.
- Assist end users with the execution of audits and related privacy and security functions.
- Incorporate usability principles into ongoing software configuration and implementation.
- Ensure that the hardware/software “fail-over” and related capabilities are appropriately implemented to minimize system downtime.
- Ensure that privacy and security functions are appropriately configured and activated in hardware and software.
- Interact with the vendors as needed to rectify technical problems that occur during the deployment process.
- Work with the vendor and other sources of information to find the solution to a user’s question or problem as needed.

### **2. Trainer**

#### General Description

Workers in this role design and deliver training programs, using adult learning principles, to employees in clinical and public health settings.

### Suggested Background

The previous background of workers in this role includes experience as a health professional, health information management specialist, or medical librarian. . Experience as a trainer in the classroom is also desired.

### Competencies

Workers in this role will be able to:

- Be able to use a range of health IT applications, preferably at an expert level.
- Communicate clearly both health and IT concepts as appropriate, in language the learner/user can understand.
- Apply a user-oriented approach to training, reflecting the need to empathize with the learner/user.
- Assess training needs and competencies of learners.
- Accurately assess employees' understanding of training, particularly through observation of use both in and out of classroom.
- Design lesson plans, structuring active learning experiences for users and creating use cases that effectively train employees through an approach that closely mirrors actual use of the HIT in the patient care setting.
- Maintain accurate records of training events.
- Maintain accurate training records of the users and develop learning plans for further instruction.