



# Creating a Leadership Team for Successful Electronic Health Record (EHR) Implementation

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## Description & Instructions

This resource is intended to aid providers and health IT implementers in identifying a leadership team for a successful EHR implementation. Selecting the right people for an EHR implementation team is a critical step in a successful implementation. In general, members of the team should be enthusiastic, well-respected, and forward-thinking. Team members should bring differing perspectives on how the EHR will be used and provide a wide array of skills and knowledge. The size of a practice will determine the size of the implementation team. For smaller practices, one person may be managing several of the areas of responsibility included.

This resource includes a template to document the leadership team; fill in the template as it is relevant to the practice.

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## EHR Leadership Team

The EHR leadership team, also known as the steering committee, can literally make or break the implementation process. “Must” attributes of this team include:

- Ability and willingness to devote sufficient time (typically at least 2 hours per week) for team meetings and to gather information for the system build and workflow development.
- A consistently positive point of view toward the solution and implementation process.
- One lead member who has the responsibility and willingness to make final decisions, particularly when conflicts arise.
- It is recommended to have an actively practicing physician, nurse or other clinician as a part of the EHR leadership team to provide front-line perspective to workflow development.

## Instructions

Depending on the size and type of facility, the leadership team consists of three or more members from a cross-section of backgrounds and departments. Use the template below to identify the key roles and responsibilities necessary to create and document the leadership team for your EHR implementation:

**Exhibit 1 EHR Leadership Team**

Member	Role	Name	Telephone	Email
EHR Team Lead	The EHR Team Lead has the responsibility to make final decisions regarding the implementation plan.	Click here to enter text.	Click here to enter text.	Click here to enter text.
EHR Implementation Manager	The EHR Implementation Manager is responsible for keeping the project moving. In most implementations, there is a vendor counterpart to this position. The Implementation Manager is responsible for monitoring the work plan to ensure that the project is on schedule; maintaining a list of vendor and practice issues that need to be resolved; scheduling implementation-related events, such as hardware deliveries and live dates; and delegating tasks to the other members of the implementation team. In a small practice setting, the Implementation Manager is usually responsible for communicating updates to the rest of the practice. The practice manager often takes on this role.	Click here to enter text.	Click here to enter text.	Click here to enter text.

Member	Role	Name	Telephone	Email
Physician Champion	An EHR implementation should not begin without a Physician Champion. The role of the Physician Champion is to act as a liaison between the physicians in the group and the implementation team. The Physician Champion acts as a point of reference for how things are done from a clinical perspective and how physicians need the EHR application to function. The Physician Champion is responsible for keeping the physicians up to date on the progress of the EHR and for maintaining physician “buy-in” to the project.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Nurse Lead	The Nurse Lead plays a central role on the team and with fellow nurses; he or she should be a respected thought leader who understands clinical workflows, can inspire nursing staff to embrace change, and drives consensus among nursing staff.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Medical Assistant Lead	The Medical Assistant Lead plays a central role on the team and with medical assistants; he or she should understand medical assistant workflows, inspire medical assistant staff to embrace change, and drive consensus among Medical Assistants.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Scheduler Lead	The Scheduler Lead plays a central role on the team and with other scheduling assistants; he or she should understand scheduling workflows, inspire scheduling staff to embrace change, and drives consensus among scheduling staff.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Registration Staff Lead	The Registration Lead plays a central role on the team and with other registration assistants; he or she should understand registration workflows, inspire registration staff to embrace change, and drive consensus among registration staff.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Lab Staff Lead	The Lab Lead plays a central role on the team and with other laboratory staff; he or she should understand lab workflows, inspire lab staff to embrace change, and drive consensus among lab staff.	Click here to enter text.	Click here to enter text.	Click here to enter text.

Member	Role	Name	Telephone	Email
Information Technology Lead	The Information Technology Lead is responsible for deployment and operation of the software and hardware (e.g., workstations, wireless tablets, printers, and scanners). This is the go-to person for people who have questions about the operation of the software and hardware.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Billing Lead	The Billing Lead plays a central role on the team and with other billing staff; he or she should understand billing workflows, inspire billing staff to embrace change, and drive consensus among billing staff.	Click here to enter text.	Click here to enter text.	Click here to enter text.
EHR Builder	The EHR Builder is responsible for building and customizing any EHR application areas such as templates, drop-down boxes, and pick lists. This person will know more about how the EHR functions more than any other person in the practice. This person may also have regular communication with the EHR vendor and may be involved in training of new staff in how to use the EHR.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Workflow Redesign Lead	The Workflow Redesign Lead is responsible for training staff in how to assess current workflows and how to redesign workflows with EHR implementation. This Lead is also responsible for the incorporation and training of workflow redesign that incorporates the achievement of quality improvement activities and programs.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Super-User Lead	The Super-User Lead is responsible for drafting a description of Super-User responsibilities and working with various other leadership team leads to recruit and train Super-Users. A Super-User is a regular staff member who learns the system prior to implementation so that he or she can expedite IT support and provide problem-solving at the point of need to other staff members during implementation.	Click here to enter text.	Click here to enter text.	Click here to enter text.