



Work Plan Template: For Immunization Workflow Changes

This template is designed to streamline your vaccination workflow project(s). It is meant to outline the major tasks required for a successful implementation. However, this document does not contain every task or the detailed system modifications needed in order to go live. Each organization will need to determine what tasks and additional system build is needed based on scope, workflow needs, and other factors.

Ownership Grid

As most organizational enhancements related to vaccination workflows involve multiple departments and cross-functional areas, it is necessary to clearly define roles and responsibilities. The ownership section describes the participation by the various roles in completing the tasks or deliverables for your vaccination initiatives.

Project Plan & Milestone Tracker

It is vital when managing a project to align stakeholders by clearly communicating the project goals and objectives. The accompanying project plan provides a high-level summary of the actual and expected tasks and implementation estimates. The template is designed to provide you with an example of a vaccination optimization workflow project. As you enter in the specific dates of your project in the Project Plan, the Milestone Tracker will automatically generate.

Another tool used to clearly communicate key stakeholders and ensure they stay briefed on the project is the Gantt chart. The following Gantt chart provides a visual representation of the project plan template. This example illustrates the start and finish dates of the terminal elements and summary elements of a project.

Final Note

This is only a guide. Your organization has numerous quality and vaccination workflow options and not all are detailed within this document. While this resource will aid you in the main design and build tasks that occur when optimizing your vaccination workflow(s), it is not all-encompassing.





Ownership Grid

Project Leads/Roles	Description and Responsibilities	Primary Owner
Customer Lead/Implementation Manager	Coordinates and manages the project. May be the project manager.	
Customer Clinical Lead	Decision maker for clinical scope. Coordinates clinical review(s) with appropriate stakeholders.	
Physician Champion/Nurse Champion	Solicits and provides clinical feedback on workflow and system modifications. Communicates decisions to the user community.	
Customer Application Analysts	Responsible for technical build. Tests workflows and provides insight and support to Physician and Nurse Champions.	
HIT	Description and Responsibilities	Primary Owner
Chief Medical Information Officer	At a high level, the CMIO bridges the gap between the clinical and administrative considerations of implementation; selects clinical champions and in some cases may act as champions themselves; helps translate the administration's vision of Clinical Decision Support (CDS) to the clinicians and communicates the clinician's desires and concerns regarding CDS back to administrative leadership.	
Super User/Physician Champion	Super Users are those who have become adept at using the new system or interventions. They can assist others who are having difficulty, and like clinical champions they may help to garner support.	
Director of Informatics	A stakeholder who understands the technical limitations of the proposed intervention(s) and plays an important role in the implementation of CDS solutions. Possesses a deep knowledge of the clinical information systems/hardware/software and might also help to understand the impact a new intervention might have on these systems – and ultimately on workflow.	
EHR Team Lead	<ul style="list-style-type: none"> Assesses software and hardware needs Manages testing and go-live Provides (or coordinates) service and support Handles or supervises upgrades/maintenance Potential: Serves as project manager Potential: Coordinates with vendor for troubleshooting 	
Project Manager	<ul style="list-style-type: none"> CDS-specific: overall responsibility to deploy/maintain CDS knowledge assets, collect and analyze evaluation data General IT: overall responsibility to support and maintain clinical information systems 	
Clinical/Pharmacy	Description and Responsibilities	Primary Owner
Clinical Champion(s)	The clinical champion is perhaps one of the most significant and important roles in the implementation of CDS. These are individuals who help to support the need for and to rally support for CDS. They may also act as a messenger to the administration to suggest changes in the system or to workflow. The ideal clinical champion is respected as a clinician, but also has substantial knowledge in the field of informatics.	
Physician	<ul style="list-style-type: none"> Performs patient care activities affected by CDS Generates data for, or are affected by, interventions Clinical authorities for content in CDS interventions Helps ensure interventions meet needs and are successfully adopted Establishes goals for EHR implementation Evaluates and selects technology Chooses EHR vendor Addresses clinical needs Works to get staff buy-in Defines project scope and sets budget Monitors effect on productivity Tracks staff satisfaction 	
Clinician	<ul style="list-style-type: none"> Evaluates clinical workflows and recommends changes Validates future clinical workflow descriptions Assesses software's clinical usability Potential: Champions the project among staff Potential: Coordinates with vendor for troubleshooting 	
Nurse Lead	<ul style="list-style-type: none"> Performs patient care activities affected by CDS Generates data for, or are affected by, interventions Clinical authorities for content in CDS interventions Helps ensure interventions meet needs and are successfully adopted 	
Pharmacy Director	With the pharmacy's role in medication safety, it is necessary for the director or another representative to be closely involved with the implementation.	
Office Manager	<ul style="list-style-type: none"> Evaluates day-to-day usability of EHR software Oversees integration with legacy technology Oversees integration with complementary software, eg, back-office applications Manages transition from paper to digital records Identifies data conversion and reporting needs Helps manage system training Potential: Serves as project manager Potential: Champions the project among staff Potential: Coordinates with vendor for troubleshooting 	
Quality	Description and Responsibilities	Primary Owner
Quality Officer	The Quality Officer may take a significant role in helping to align CDS with clinical objectives. Implementing CDS based on specific clinical need is a method of selecting specific interventions.	
ACO Director	Provides leadership, direction, and support in the management of the health system's Accountable Care Organization (ACO) quality operations and clinical informatics.	
PCMH Lead	Manages defined aspects of the Patient Centered Medical Home (PCMH) program to successfully accomplish program goals and to support quality improvement initiatives.	
Education/Training	Description and Responsibilities	Primary Owner
Super User/Training Lead	A strong clinical user that will serve as the liaison between the build and/or quality team and the end user.	
Director of Nurse Education	Provides leadership and guidance on the best practices related to training initiatives as well as post go-live refresher training programs.	



Project Plan - Milestone Tracker

Status	Task	Owner	Start Date	Due Date	1/11/17	1/6/17	1/13/17	1/20/17	1/27/17	2/3/17	2/10/17	2/17/17	2/24/17
Phase 1: Project Scoping													
Project Planning													
			1/1/17	2/1/17									
On Track	Finalize project plan and timeline		1/5/17	1/29/17									
On Track	Develop project objectives and charter												
On Track	Hold internal kickoff with project team												
Project Kickoff													
On Track	Hold project kickoff with project team and key stakeholders		2/1/17	2/14/17									
On Track	Facilitate meeting scheduling and preparation (ie, weekly check-in calls, monthly governance check-in calls)												
Phase 2: Implementation													
On-Site Assessment													
On Track	Develop interview and focus group guides for onsite assessment		2/14/17	3/14/17									
On Track	Conduct onsite assessments at selected facilities to observe and understand current state EHR workflows												
On Track	Compile and disseminate onsite assessment findings and workflow analysis to relevant stakeholders												
On Track	Conduct meetings with key stakeholders to share onsite assessment findings and obtain buy-in												
Baseline Data and Workflow Mapping													
On Track	Determine baseline data request												
On Track	Request report build on baseline vaccination rates from selected sites												
On Track	Receive baseline report from "Reporting Team"												
On Track	Map current state EHR workflows based on onsite assessment findings												
On Track	Map future state EHR workflows												
On Track	Present current and future state clinical workflows to participants and relevant IDN stakeholders												
Technical Build, Organizational Enhancements, and Testing													
On Track	Outline key steps for building, integration, training, and pilot launch and make recommendation on overall feasibility												
On Track	Review evidence-based EHR tools with clinical and technical experts												
On Track	Vaccine screening tool build												
On Track	Vaccine BPA build												
On Track	Reminder Recall system build												
On Track	Reminder Recall workflow enhancements												
On Track	Standing order build												
On Track	Standing order workflow enhancements												
On Track	Perform unit testing of tools												
On Track	Perform integrated testing of tools												
On Track	Perform user acceptance testing of tools												
On Track	Review completed build with project team and stakeholders												
Training, Education, and Change Management Support													
On Track	Develop pre- and post-implementation surveys												
On Track	Disseminate pre-implementation survey to evaluate provider and administrative staff feedback on current state workflows												
On Track	Develop educational materials and plan training sessions for educating providers and administrative staff on new workflows												
On Track	Disseminate educational materials to providers and administrative staff												
On Track	Hold training sessions with providers and administrative staff												
Go-Live and Ongoing Support													
On Track	Push build to production / go-live												
On Track	Provide additional change management and go-live support												
Phase 3: Documentation & Ongoing Support													
Collect Results													
On Track	Disseminate post-implementation survey to evaluate provider and administrative staff feedback on new workflows												
On Track	Collect pre- and post-implementation survey results												
Post Live Utilization Success													
On Track	Conduct analysis of survey results for inclusion												
On Track	Conduct onsite assessments at selected facilities to observe and document findings												

