

# Teamwork: Structure and Roles of the EHR Project Team

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by Margret Amatayakul, MBA, RHIA, CHPS, FHIMSS

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*Every project needs a team. In this book excerpt, a veteran HIM consultant describes the organization of the EHR implementation team.*

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Among the early steps in the EHR planning process is the need to construct an organizational structure for the project. Most healthcare organizations are structured around functions, business units, or a combination of both. When a project is undertaken that cuts across the organization's structural boundaries, such as an EHR project, staff members are drawn from various components and either temporarily report to the project manager or have a matrix reporting relationship to the project manager.

## The Project Team

Many team members who are not formally reassigned their reporting relationship may not view their relationship to a project manager as one of "reporting." While it is unlikely that such a relationship is one in which the project manager has formal hiring and firing authority, the relationship should be one where the team members take direction and follow through in the same manner as in their reporting relationship with their day-to-day activities manager.

Senior management should foster the authority of the project manager in a matrix reporting relationship. This should include allocation of resources for staff members to be freed from their day-to-day activities for a portion of their time if they do not already have project participation as a part of their job or compensated for additional time spent on the project. A project manager who must constantly cajole team members or use their managers for leverage to perform their project duties will be hard-pressed to achieve success.

An ideal situation would be where project team members are formally appointed by senior management to report to the project manager for the purpose of the project and where the project manager reports back to senior management on the team's overall performance and is supported when individual issues arise. This sends a strong message concerning the importance of the project and the members' roles.

The project itself also has an organizational structure. The types of teams and their members may vary depending upon where the project is in its life cycle. In the initiating phase, there may be a relatively small core team of representatives from major user groups (e.g., physicians, nurses, pharmacists, therapists, researchers, etc.) and support groups (information technology [IT], health information management, finance, decision support, quality improvement, etc.). Once approval for the project is gained, the planning process may require many of the same types of members, as well as others—some who join formal teams and others who may serve as internal consultants only.

When several teams and internal consultants are required to conduct a large project such as the EHR, there is typically a steering committee or crosscutting team that ensures collaboration among several individual teams designed to work on specific tasks. "EHR Steering Committee Composition" ([below](#)) provides a list of the types of members who may comprise the steering committee.

## Team Building

It is worth noting that the term "team" has been consistently used in describing the members of the project's work force. "Team" is used consciously to convey a collaborative effort among people who bring different and diverse skills and backgrounds to the project. Although the term "committee" may be used, committees tend to be organizational structures that

serve ongoing organizational work efforts. “Committee” also conveys permanence, where “team” suggests temporary engagement until a task is completed.

## Building the Team

Whatever terminology the organization uses, team building is a critical task for the project manager. Team building must be a way of life and the responsibility of every team member. Because a team has a specific goal, all team members must understand and accept the goal. The team should be highly results oriented. Because the ideal team is comprised of members that bring unique contributions to the project task, there needs to be awareness of the unit nature of the team. Lack of appreciation of the contributions of others, turf battles, different work orientations, and even different jargon need to be put aside to ensure that every member can make an effective contribution.

Tuckman describes five stages of group development that the project manager should understand and apply in leading the team through its tasks. Much like passing through the stages of grieving, a newly formed team will typically exhibit the various stages of group development described in “Five Stages of Group Development” (see page 46). It is the project manager’s responsibility to guide the members of the team through these stages as rapidly as possible.

## Healthcare Teamwork

While healthcare delivery requires teamwork, the nature of the healthcare team is quite different than that of a project team. The healthcare team has a specific leader (the physician) who directs other specialists (i.e., nurses, therapists, technicians, etc.). Everyone understands the structure of the health-care team and their position within it. The healthcare team does not undergo the stages of team building.

In some respects the fact that healthcare is so dependent on a specific type of teamwork may make creating effective EHR project teams more difficult. Physicians who are always in the position to direct may find themselves in other roles on teams, and those who typically take direction may be called upon to direct. Any tools the project manager can use to convey the nature of a project team, how individuals can be valuable and equal members, and what to expect can help the team work through the team-building stages.

## Meetings

A major element of teams is, obviously, working together. Many teams are becoming more comfortable working in a virtual environment rather than face-to-face. Whether the team meets in virtual space (e.g., conference call, chat group) or in person, however, the meeting is an integral part of the team’s work processes. Meetings are both the most universal part of work life and the most despised part of work life. So many meetings are unproductive that individuals who may make great team members and have significant contributions to an EHR project may be reluctant to volunteer or agree to participate solely because they do not want yet another set of meetings to attend.

Project managers must facilitate meetings so that they do not become time wasters. They must overcome the common pitfalls, such as overly long, unfocused meetings and meetings that fail to result in actions or decisions.

Five Stages of Group Development		
Stage	Description	Aids to Move to Next Stage
Forming	Stage where personal relations are characterized by dependence on other group members for guidance and direction. Group members desire acceptance by the group and so attempt to keep things simple and avoid controversy.	Formal orientation processes, potentially including fun break-the-ice exercises or formal member characterization activities such as Myers-Briggs personality assessments. Each team member must relinquish the comfort of nonthreatening topics and risk the possibility of conflict.
Storming	Stage characterized by competition and conflict in personal relations. Because of fear	Group members need to move from a “testing and proving” mentality to a problem-solving mentality. Listening and conflict management techniques

	of exposure or failure, team members seek structural clarification and commitment. Typically some members will become completely silent and others will attempt to dominate.	are essential. To manage the natural conflict, the project manager needs to be firm about setting goals, communicate frequently, encourage team members to be open and honest about concerns and differences, and emphasize the importance of following project management techniques. To foster an early sense of accomplishment, the project manager can start the group producing tangible work, such as a list of requirements or a redesigned work flow for a specific function.
Norming	Stage where group members demonstrate cohesion and are engaged in active acknowledgment of all members' contributions. This is when team members experience trust and the sense of group belonging and even relief as a result of resolving interpersonal conflicts. Data will flow freely and creativity is high.	The major drawback of the norming staging is that members may begin to fear the inevitable future breakup of the group and may resist change as a result. No one will own up to this concern, but the project manager should suspect this is occurring when the group cannot settle down and make decisions. Change management techniques must be employed to get the group to the next stage.
Performing	Stage where the team genuinely solves problems leading toward optimal solutions. In this stage, members can work independently, in subgroups, or as a total group with equal facility. Individual members are self-assured and no longer need group approval but respect other members' contributions.	This is the ultimate goal of team building. Unfortunately, experts report that many groups do not achieve this stage. The project manager must be skilled in advancing the group through the earlier stages as quickly as possible, while recognizing that each stage is unavoidable and must be managed to get to the next stage. Once in the performing stage, however, the project manager must also prepare the team to adjourn.
Adjourning	Stage that terminates the task and members disengage from the group's relationships. Sometimes this creates apprehension and may be regressive.	The most effective interventions in this stage are celebration and recognition. Individual members can also be recruited for ongoing monitoring activities, trainers for new staff, and subsequent projects. However, promises for such activities should only be used when they advance the disengagement process and are real.

Adapted from: Tuckman, B. "Developmental Sequence in Small Groups." Psychological Bulletin 63 (1965): 384–99. Tuckman, B., and M. Jensen. "Stages of Small Group Development." Group and Organizational Studies 2 (1977): 419–27. George Mason University, Center for Service and Leadership, Leadership Development Series. Available online at [www.gmu.edu](http://www.gmu.edu).

## EHR Steering Committee Composition

Members	Purpose
EHR project manager	Provides EHR project direction and support
User representatives (from major functional and business units, including their informaticists, as well as medical staff, research, quality improvement, and other major clinical data users or suppliers)	Understands current data requirements and work flows, evaluates functionality of new systems and ability to implement new work flows and processes, gains buy-in for EHR adoption
IT professionals (e.g., applications, operations, network, telecommunications)	Understands and evaluates technical capability of current and proposed systems and level of fit
HIM professionals (e.g., data analysis, data quality, operations and data flow, data sets, data broker)	Provides data analysis, data quality, operations and data flow, data sets and data broker perspective
Internal consultants (as needed, e.g., financial analyst, contracts manager, human resources, labor relations, legal, etc.)	Provide probability and criticality estimation, offer ways to implement controls, represent customer interests
Trainers	Gain insight for creating training and programs

Corporate compliance official, information privacy official, information security official	Coordinates with compliance activities
Executive sponsor	Represents senior management, can help interpret message for senior management
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**Margret Amatayakul** ([margretcpr@aol.com](mailto:margretcpr@aol.com)) is president of Margret\A Consulting, LLC, an independent consulting firm based in Schaumburg, IL.

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