

EMR Responsibility Matrix

This matrix can be used as a collaborative tool for identifying and tracking aspects of your clinic's workflow as it relates to implementation of an EMR.

	Reception	Medical Office Assistant	Nurse	Billing Clerk	Transcription	Referral Clerk	Physician	Clinic Manager	Other
Number of Persons									
Initials & Hours per Week									
Initials & Hours per Week									
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Initials & Hours per Week									
Pre Go-Live Basics									
EMR Vendor Help Desk (accessing)									
Passwords (and what to do if they fail)									
Hardware (troubleshooting basics)									
Patient visit walkthrough									
Patient Care Processes									
Registration and attachment									
Scheduler									
Referral									
Consult									
Clinic correspondence									
Managing incoming faxes									
Monitoring and sending outgoing fax transmissions									
Assessment and Treatment									
Entering encounter information									
Creating templates									
Diagnostic Imaging									
Ordering									
Receiving									
Validating and sign off									
Labs									
Ordering									
Receiving									
Validating and sign off									
Medications Management									
Creating									

	Reception	Medical Office Assistant	Nurse	Billing Clerk	Transcription	Referral Clerk	Physician	Clinic Manager	Other
Managing									
Care Planning									
Creating									
Managing									
Operational Management									
Billing									
Entering Alberta Health billing									
Entering WCB									
Entering third party									
Billing reports									
Billing reconciliation (balancing)									
Security									
User profile management									
Privacy									
Access management									
Audit log review									
Health Information Management									
Reporting									
List management									
Scanning and attachment									
Retention management (archiving and culling)									
Health Workforce Planning									
Managing listing clinic staff in EMR									
Maintaining other calendars									
Maintaining vacation and absence coverage (messaging and tasking)									
Equipment and Facilities Management									
Adding equipment and facilities									
Population Health Processes									
Preventative Screening									
Printing health information from EMR (handouts)									
Creating a search									
Generating reports									

	Reception	Medical Office Assistant	Nurse	Billing Clerk	Transcription	Referral Clerk	Physician	Clinic Manager	Other
Search favorites/templates									
Generating screening reminders									
Reports of overdue clinical services									
Evaluation, Identification and Monitoring									
Search by patient population groups									
Assigning patients to clinical sub-groups									
Generating patient-specific reminders									
Generating disease- and problem-specific reminders									
Adherence reports									
Generating reports									