**Team Roles & Responsibilities (Task Analysis) Template**

This template may be used to guide team discussions about assigning roles and responsibilities related to **quality improvement and clinical tasks**.

**TIPS:**

* If your team has not worked on QI processes before, consider working with a practice facilitator.
* Use your current state **process map** as a reference.
* Consider adding steps that may be missing from your current state process map that could be worth including – potentially involving PDSA trials.
* The first two ‘Who?’ columns allow for exploration of who **could** technically be responsible for the task, with regard to:
  + Scope of practice, professional designation, etc.
  + Previous experience
  + Personal interest
  + Time and availability
* In some instances, the person or role currently responsible for the task may make perfect sense – after a brief discussion, simply document and move on to the next step.
* It’s helpful to keep in mind that the physician or nurse practitioner may be **able** to do all of the steps; however, sharing the load across the team is the goal.
* The grey ‘Who?’ columns are intended to clarify who specifically will be **responsible** for each task:
  + This could be one person, more than one person, or a ‘role’ (e.g., MOAs).
  + For each process step, consider also designating at least one person to be cross trained as back-up.
  + Cross training also allows team members to ‘stretch’ in their roles and build their skills.
  + Ultimately, as many members of the team as possible should be able to do as many of the tasks as possible.
* Remember to PDSA – what seems like it will work in a planning meeting may not work exactly as planned in practice!
* The EMR guides can be a helpful tool for generating EMR lists and adding point of care reminders.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *[Topic/Project name]*  *Team Tasks* | | *Who?* | | | |
| *Could do it*  *(in scope)* | *Has interest/ experience/ availability* | *RESPONSIBLE* | *CROSS TRAIN* |
|  | ***QI and clinical tasks:*** |  |  |  |  |
| *Example: Regularly schedule QI team meetings* |  |  |  |  |
| *Example: Generate a referral(s), if needed* |  |  |  |  |
| *Example: Add a point of care reminder to patient’s chart* |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |