

Checklist for CDS Goal Charter*

*This worksheet was adapted from a 2011 book published by the Healthcare Information and Management Systems Society (HIMSS) entitled "Improving Outcomes with Clinical Decision Support: An Implementer's Guide, Second Edition."

Once you have identified goals and objectives on which to focus CDS attention, you might consider making a formal charter for the targets, individually or collectively. There are different ways to approach templates for project charters, and the following checklist is one example. For this worksheet sample, we have provided notes about the type of information that could be used for some of the elements in a charter focusing on the objective of reducing preventable allergic reactions.

Checklist for CDS Goal Charter¹

Check		Section	Details
<input type="checkbox"/>	1	Overview	
<input type="checkbox"/>	1.1	Purpose Statement	What are the reasons for addressing this goal? For example, antibiotics given to patients who are allergic to them result in significant morbidity and mortality.
<input type="checkbox"/>	1.2	Goals and Objectives/Expected Outcome	What are expected returns from addressing this goal/objective? They need to be important and worthwhile! For example, prevent patients from getting antibiotics to which they are allergic and reap corresponding returns.

<input type="checkbox"/>	1.3	Scope	<p>What are the boundaries for this project? For example,</p> <ol style="list-style-type: none"> 1. Actions from this initiative will affect major nodes in the medication management process— Prescription, Dispensing, Administration 2. Will only focus on antibiotic medications 3. Non-antibiotic medications will not be considered, although we may favor actions that are scalable to other medication groups.
<input type="checkbox"/>	1.4	Critical Success Factors	<p>What are factors needed for success? For example,</p> <ol style="list-style-type: none"> 1. Education to all, especially to frontline stakeholders 2. Easy CDS system use with minimal disruption of current workflow 3. Quantifiable reduction in preventable adverse events.
<input type="checkbox"/>	1.5	Assumptions	<p>What are assumptions related to the technology, resource, scope, expectation, or timeline assumptions for addressing this goal/objective? For example,</p> <ol style="list-style-type: none"> 1. Adverse events from antibiotics are detectable and preventable. 2. We have statistical methods that can determine whether our actions are effective, even if the event rate is very low.

<input type="checkbox"/>	1.6	Constraints	What are the constraints related to budget, resources, timeline, and technology? For example, <ol style="list-style-type: none"> 1. This project needs to be completed within 12 months. 2. Action plan must be efficient for frontline stakeholders. 3. Leadership support is critical.
<input type="checkbox"/>	2	Authority and Milestones	
<input type="checkbox"/>	2.1	Funding Authority	Who or what is funding efforts toward this goal? For example, this project is funded by hospital capital budget.
<input type="checkbox"/>	2.2	Oversight Authority	What committee is responsible for this goal/objective? For example, the quality improvement, patient safety, and/or P&T committee could be the oversight authority for an objective that focuses on decreasing preventable allergic reactions. It is important that the CDS Committee not take full authority for all interventions. Involving more stakeholders at the front lines will increase acceptance.

<input type="checkbox"/>	2.3	Major Milestones	What are the major points of success and deliverables that will define progress toward this objective? For example, 1. Get buy-in from oversight authority and executive committee. 2. Define feasible data management strategy. 3. Formulate action strategy and timeline. 4. Execute action strategy. 5. Analyze and interpret results.
<input type="checkbox"/>	3	Organization	
<input type="checkbox"/>	3.1	Committee Structure	Graphically represent committees pertinent to this goal/objective and their interaction.
<input type="checkbox"/>	3.2	Roles and Responsibilities	Three column table stating the member, their role, and responsibilities
<input type="checkbox"/>	3.3	Facilities and Resources	What are the facilities and resources needed? For example, office space, computers, personnel.
<input type="checkbox"/>	4	Points of Contact	Who is the primary and back-up contact for the project?
<input type="checkbox"/>	5	Glossary	Define all terms and acronyms used in the project charter.
<input type="checkbox"/>	6	Revision History	Track all changes to the charter document.
<input type="checkbox"/>	7	Appendices	Include any additional relevant information (for example, charts, tables, lists).

¹ Adapted from: State of Texas Department of Information Resources. *Project Charter*. <http://www.dir.state.tx.us/pubs/framework/gate1/projectcharter/index.htm>. Updated 01 June 2008.