

Scrum Team Roles in Healthcare IT

Quick guide: matrix reporting, sprint events, and BAT sign-off for a cross-functional healthcare team

Who is on the team, and who they report to

Role	Scrum accountability	Home team	Line manager	Alloc.
Product Owner	Product Owner	Digital Patient Experience	Director of Digital Health	100%
Scrum Master	Scrum Master	Agile Delivery Office	Agile Delivery Manager	100%
BAT representative	Developer	Laboratory Services	Lab Operations Director	50%
Quality Engineer	Developer	QE Practice	QE Manager	100%
EHR config analyst	Developer	Clinical Applications	Clinical Apps Manager	60%
Java dev (HL7 / FHIR)	Developer	Integration Engineering	Integration Eng Manager	100%
.NET + React devs	Developer	Digital Engineering	Digital Eng Manager	100%
SQL dev	Developer	Data & Analytics	Data & Analytics Manager	100%

Scrum Guide 2020 defines three accountabilities. QE, configuration, and BAT work count as Developer work because they create the increment.

Who decides what

Decision	Scrum team	Line manager
What to build, in what order	PO decides	Informed; raises constraints
How much fits in the sprint	Developers decide	Sets allocation % before planning
Standards (code, test, build, data)	Applies; proposes changes	Owns across teams
Production support pull-aways	Absorbs within buffer	Decides for P1; tells SM same day
Performance review	PO + SM give written input	Writes and owns

Two-week sprint calendar

Day	Event	Length	Who
1 (Wed)	Sprint Planning	3 h	Whole team
Daily	Daily Scrum 9:15	15 min	Developers; PO/SM as needed
2 and 7	Config migration to test	Window	Config analyst
4 and 8	Backlog refinement	60 min	PO, BAT, Config, QE, one dev per stack
6-9	BAT story validation window	Half-days	BAT rep, QE
10 (Tue)	Sprint Review + Retrospective	60 + 90 min	Team; stakeholders at Review; no line managers at Retro

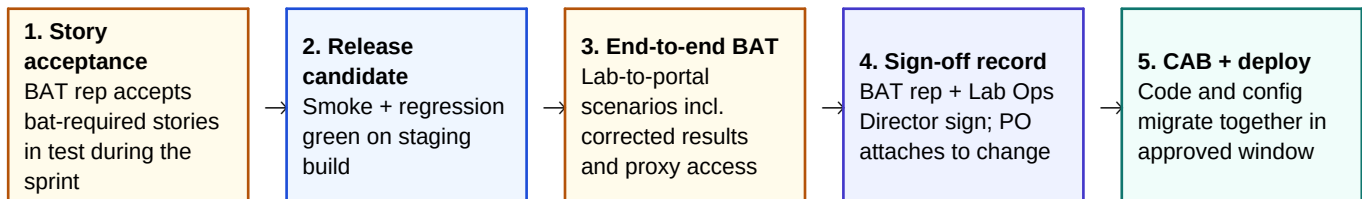
Capacity: plan in focus days, not headcount

Focus days = (Sprint days - PTO) x Allocation - Support buffer. Example: config analyst with 1 PTO day, 60% allocation, 1-day buffer: $(10 - 1) \times 0.6 - 1 = 4.4$ days. Compare config and BAT focus days with the number of stories that need them before committing.

Sprint Review vs BAT sign-off

Dimension	Sprint Review	BAT sign-off
Source	Scrum Guide event	Organization's release control
Cadence	Every sprint	Every production release
Output	Feedback; updated backlog	Signed record attached to change request
Who signs	Nobody	BAT rep + business owner (or named delegate)
Blocks release?	No	Yes - CAB requires it

BAT sign-off flow



Retrospective rules for matrix teams

- 1 Line managers do not attend. Honest feedback stops when the reviewer is in the room.
- 2 Tag each action: inside the team, or needs a line manager.
- 3 SM escalates manager-owned actions within two working days and reports back at the Daily Scrum.
- 4 Revisit allocation and support buffers when the same pull-away shows up twice.

Before Sprint 1: the two-manager working agreement

Put each person's Scrum role, home team, line manager, allocation, support buffer, and BAT sign-off delegate on one page. Collect signatures from every line manager, the PO, and the SM. The Excel kit includes a ready-to-edit template.

References: The 2020 Scrum Guide; 45 CFR Part 171 (information blocking); HIPAA Security Rule 45 CFR 164.312(b); HL7 v2 ORU and FHIR R4 DiagnosticReport; SAFe Agile Release Train guidance. Team and names are a composite.