

Evolving ROI Specialists into Health Record Ambassadors

Save to myBoK

By Rita Bowen, MA, RHIA, CHPS, SSGB; Alisha Smith, RHIA; and Keith W. Thomas

Research and release of information (ROI) statistics confirm that more and more patients want access to their information, are requesting health records, and have started organizing their health histories. Trained ROI specialists are in high demand—receiving requests and helping patients gather health record documents.

But with so many uneducated patients reviewing their often technical health records, a question has arose as to whether ROI specialists could be doing more to help patients, and if some ROI staff, who currently serve as HIM's frontline greeters, may evolve into health record ambassadors. The following offers a foundation for expanding ROI roles, responsibilities, and opportunities to more closely interact and guide patients as health record ambassadors.

Outsourced by approximately 80 percent of hospital HIM directors nationwide, according to a white paper by the Association of Health Information Outsourcing Services (AHIOS), ROI specialists can be instrumental in improving patient satisfaction, strengthening patient engagement, and assisting organizations with “meaningful use” EHR Incentive Program achievement through increased portal participation.

The first step in the consumer-centric transition is to understand patient needs, devise new departmental workflows, and invest in bolstering ROI staff. HIM directors and their ROI specialists can use the following advice to prepare for the changing landscape of ROI as it relates to patient record requests made to aid continuing care.

Patient Touch Points in HIM

In the era of growing healthcare consumerism, both providers and payers seek to strengthen patient relationships and secure brand loyalty. According to the Beryl Institute's “The State of Patient Experience in American Hospitals” report, patient experience and satisfaction is a top priority for 70 percent of healthcare executives.¹ Every patient touch point, clinical and financial, influences the patient's attitude toward a health system and impacts their satisfaction and their willingness to revisit or recommend a provider.

Within the HIM department the ROI process is a critical patient touch point. To understand what patients want when requesting their health records, one can simply put on their personal consumer hat and ask: “What does it take for me to ‘like’ a restaurant, carwash, or dry cleaner?” The same cornerstones of customer satisfaction—quality products, prompt service, and friendly attitudes—can be applied to a facility's ROI process and portal approach.

Consider these six steps to slowly transition ROI specialists into frontline health record ambassadors:

- Stop positioning HIPAA as a barrier to health record access. Instead, explain how HIPAA protects health information and why it's important.
- Create a pocket card for patients and their families to help define HIPAA protections in simple, consumer-friendly terms.
- Fast track patient requests for records to minimize wait times and delays.
- Provide an affordable fee structure for patient record requests.
- Even if patients request records in paper form, offer other technology options as well— such as secure e-mail notification and access.
- Advise patients on which components of their health records are most pertinent for creating a medical history or continuing care via a handout or brochure.
- Demonstrate the organization's patient portal technology to patients and their caregivers when they present to the HIM department and request their records.

With regard to patient portals, ROI specialists play another important role—encouraging adoption and utilization.

Five Simple Patient-centered Steps to Take Today in ROI

- ☐ Place a patient kiosk within the ROI area for portal access.
- Help patients and families sign up for portal access
- ☐ Provide a simple guide describing the portal and how to use it
- ☐ Create a tip sheet for patients describing which parts of the health record are important for continuing care, and why
- ☐ Give patients practical guidelines for keeping their health information secure

Portals Open Doors for HIM

The rapid rollout of patient portals and online health information has opened new doors and expanded career opportunities for HIM. Among other capabilities, portals electronically reduce the barriers for patient access to their medical records; something that HIM ranks have strived for all along. Teaching patients to use portals is a sure way to strengthen the patient-HIM relationship and create new roles for ROI specialists.

A healthy understanding of the current environment sets a solid foundation for HIM professionals to take a more proactive role in guiding consumers toward safer, more secure health information decisions. The following is a quick overview of patient portal technology.

Primer on Portals

Portals are any system with the ability to provide access to individual patient health information in a secure manner through the Internet. They are designed to boost patients' proactive involvement in their care.

According to a September 2013 analysis of the US patient portal market conducted by Frost and Sullivan, portals are poised for rapid growth. The "US Patient Portal Market for Hospitals and Physicians: Overview and Outlook, 2012–2017 report" predicts 221 percent growth in patient portals by 2017.² The report also found that half of US hospitals and 40 percent of office-based physicians have a portal through their electronic health record (EHR) or practice management system.

Other facts and statistics back up the idea that patient portals are becoming a widespread way to access health information:

- Providers must have five percent of their patients using an online patient portal to meet stage 2 meaningful use criteria and receive incentive payments.
- Over 1 million veterans have access to their complete health records through the My HealtheVet patient portal, and more than 5.4 million veterans have now downloaded their Blue Button Initiative data, according to the Office of the National Coordinator for Health IT (ONC).
- More than 500 companies and organizations in the private sector have pledged to support Blue Button and give patients ready access to their health information, according to ONC.
- ONC's next step, the Blue Button Connector, a planned hub for consumers to find sources of health data, will be available in 2014, according to ONC.
- Patients rank online access to clinical data important or very important 65 percent of the time. Only 17 percent of physicians, however, provide online access, according to a Harris Interactive Poll that outlined how patients' needs are not being met.³
- Patient engagement and community integration is one of the three key elements for successful population health management, according to the Advisory Board Company's 2013 Briefing.⁴

Granting patients secure, ever-present access to their electronic health record information via patient portals is a dramatic shift for most HIM professionals. Physicians also have trouble accepting the concept of full health information access, with 65

percent of doctors in Accenture's 2013 survey titled "Patient Access to Electronic Health Records: What Does the Doctor Order?" which suggests that patients should only have limited access, not complete transparency.⁵

HIM skills correctly applied to patient portal workflows can help to calm these physician concerns while also encouraging safe, secure, and patient-friendly portal adoption.

Some Facilities Taking the Lead in ROI Change

In the best case scenario, patients are introduced to the organization's portal during their hospital stay by nursing staff and case managers. They use bedside patient engagement technology to enroll, begin navigating the system, and become comfortable accessing their health information online. However, these bedside efforts must be supplemented by HIM.

At one large academic medical center, ROI specialists provide patient education about the organization's portal as patients and their families present to HIM and request records. Patients are guided through portal sign-up and assisted with information access. A simple handout is given to each patient and their family or caregivers regarding the portal, including how to access it remotely and how to update the information contained therein. A patient-friendly kiosk and tablet to access the portal is located directly in front of the ROI window.

Second, since the organization's portal contains only a portion of the patient's health record, patients are advised regarding each section of their information and corresponding relevancy for continuing care. In other words, ROI staff help patients determine which sections of their health records are valuable for the next caregiver, and which are not.

Checklists and tip sheets are used to help patients better understand their health records and define health information access priorities. Finally, best practice advice to protect health information and keep records secure is shared with the patient and their family. HIPAA is presented as a health information safeguard versus an administrative barrier.

According to Beth Friedman, BSHA, RHIT, co-chair of AHIMA's Consumer Practice Council, this type of health information guidance for patients, their families, and their caregivers is an excellent example of how HIM know-how contributes to better patient experiences.

"HIM professionals have the power to make patient experience match the promise of better healthcare," Friedman says. "Assisting patients with portal registration, participation, and utilization as health record ambassadors is an excellent first step." The 2013 Consumer Practice Council developed a Practice Brief that offers HIM professionals advice on how to best interact with patients, "[Enabling Consumer and Patient Engagement with Health Information](#)," which was published in the February 2014 issue of *Journal of AHIMA*.

Other available patient engagement tools created by the practice council are listed in Table 1.

Table 1. AHIMA Consumer References and Tools

This list offers patient engagement tools created by the AHIMA Consumer Engagement Practice Council that can help strengthen HIM's relationship with patients and their caregivers.

Mobile Health Application

AHIMA. "Best Practices for Mobile Health? There's an APP Guide for That." [myPHR.com](http://myphr.com/HealthLiteracy/MX7644_myPHRbrochure.final7-3-13.pdf). http://myphr.com/HealthLiteracy/MX7644_myPHRbrochure.final7-3-13.pdf.

Tips for Patients to Understand their Health Records

AHIMA. "Understanding Your Medical Record." [myPHR.com](http://www.myphr.com/healthliteracy/myphr.pdf). <http://www.myphr.com/healthliteracy/myphr.pdf>.

How to Select a PHR

AHIMA Personal Health Record Practice Council. "[Helping Consumers Select PHRs: Questions and Considerations for Navigating an Emerging Market](#)." *Journal of AHIMA* 77, no. 10 (November-December 2006): 50-56.

Tips for HIM to Better Engage Patients

AHIMA. "[Enabling Consumer and Patient Engagement with Health Information](#)." *Journal of AHIMA* 88, no. 2 (February 2014): 56-59.

How to Help Consumers Respond to Medical Identity Theft

AHIMA. "Medical Identity Theft Response Checklist for Consumers." *Journal of AHIMA* 79, no. 7 (July 2008): 67.

Health Information Consumer Bill of Rights

AHIMA. "[Consumer Health Information Bill of Rights: A Model for Protecting Health Information Principles](#)."

What It Takes to Evolve ROI Specialists

Whether based in-house or outsourced, ROI specialists are adept at handling a wide variety of health record requests. From attorneys to payers to continuing-care providers, a multitude of requirements must be met. Each requestor brings a unique set of conditions.

Sharpening these ROI skills to accommodate new patient information ambassador responsibilities requires investments in training, education, and staff budgets.

Training

To better serve as health record ambassadors for patients, their families, and their caregivers, ROI staff should receive more in-depth training on:

- How patients and their families can keep information secure
- New patient rights for disclosure restrictions under the HITECH-HIPAA Omnibus Rule
- All applicable state and national rules regarding release of protected health information (PHI), including review of state legal handbooks from state associations
- Security best practices including data encryption, physical CD protections, and secure paper document management
- Deeper understanding of each section of the health record and parts that are most relevant for ongoing patient care
- How to create, manage, and maintain personal health records (PHRs)—including steps to collect historical information from other providers
- In-depth instruction on using the organization's patient portal

Education

All of the previously discussed recommendations require an upgrade in ROI specialists' skills and education. A higher level of people skills and medical record knowledge is required of tomorrow's ROI workforce.

The best case scenario is to evolve ROI staff over time with the three following long-term goals in mind:

- Customer service training and certification
- HIM education and certification (including ROI specialist certification)
- AHIMA credentials

Staff Budgets

As ROI specialists transition from paper processors to health record ambassadors, education and credentials are a necessity. While employees can be trained, there is also value in hiring credentialed RHIA or RHIT professionals who have the HIM skill set needed to perform the duties—and, in turn, a higher pay grade is appropriate. This is especially true as advocates help patients and families build their own medical histories. HIM directors should work with their organizations' human resources departments to evolve job descriptions over time and upgrade pay scales accordingly.

If outsourcing the ROI function, inquire with the organization's ROI partner as to the availability and cost for a higher-skilled ROI workforce. A few extra dollars spent on higher-level ROI specialists may result in higher HCAHPS (patient satisfaction) scores and greater patient portal adoption—both of which lead to increased hospital revenues.

Target Those Most in Need with Efforts

As with PHR adoption, patient interest in obtaining health records and building a health information history is often driven by a specific diagnosis, procedure, or medical condition. The following are three practical examples:

- Cancer patients undergoing cancer treatments and seeing multiple care providers
- Trauma patients undergoing multi-specialty recovery including frequent physical therapy, occupational therapy, and surgeon and primary care visits
- Patients with chronic conditions, who are highly susceptible to higher rates of readmission and poorer clinical outcomes, according to AARP's 2013 report "Chronic Care: A Call to Action for Health"⁶

One strategy is to target these frequent ROI requestors with educational materials previously mentioned, portal prioritization, and educational information specific to their condition. The meaningful use program requires education to be provided to patients regarding their conditions. ROI specialists would supplement these efforts by also providing handouts, pocket guides, and other material to patients. The more informed the patient is regarding all aspects of their care, the more medically compliant they are likely to be, which in turn lowers overall healthcare costs.

In addition, the provision of patient-specific resources for at least 10 percent of patients seen during an office visit is included as a stage 2 meaningful use objective. The patient-specific education resources objective changed from being a menu objective in stage 1 to a core objective in stage 2. Providing these resources to the patient could be done as part of standard ROI processing with information supplied to them about their condition or through targeted marketing communications.

Don't Miss the Opportunity

Patient-centered strategies that enhance customer satisfaction result in bottom line payoffs for healthcare providers. From the top down, a massive push is on to make patient access to medical information easier. According to the Department of Health and Human Services' Office of Disease Prevention and Health Promotion's National Action Plan to Improve Health Literacy, nine out of 10 adults have difficulty using health information that is routinely available in healthcare facilities, retail outlets, media, and communities.⁷ Indeed, a new role for health record ambassadors in all healthcare provider settings is easily justified.

Numerous studies, such as one recently conducted with 200 cardiac patients by Parkview Physicians Group Cardiology, show that patients with electronic access to their information are more involved in their healthcare and can achieve better clinical outcomes, minimize readmissions, and reduce their overall healthcare costs. HIM directors and their ROI staff or outsourced partners must be active partners in this transition.

Endorsing and facilitating patient access to health information through patient portals may be HIM's biggest cultural shift since the advent of prospective payments and DRGs. But savvy HIM professionals must not let this new opportunity pass them by.

The role of patient information ambassador is a new career path for ROI specialists and a practical way for HIM departments to connect with patients. Now is the time to seize the opportunity—and continually elevate HIM's value within healthcare provider organizations.

Notes

1. Wolf, Jason A. "The State of Patient Experience in American Hospitals 2013: Positive Trends and Opportunities for the Future." The Beryl Institute. 2013. www.theberylinstitute.org.
2. Frost and Sullivan. "US Patient Portal Market for Hospitals and Physicians." September 2013. <http://www.frost.com>.
3. Harris Interactive. "[Patient Choice an Increasingly Important Factor in the Age of the 'Healthcare Consumer'](#)." Harris Interactive Poll. September 10, 2012.
4. Advisory Board Company. "[Three Key Elements for Successful Population Health Management](#)." 2013.
5. Accenture. "Patient Access to Electronic Health Records: What Does the Doctor Order?" 2013. <http://www.accenture.com/SiteCollectionDocuments/PDF/Accenture-Patient-Access-to-Electronic-Health-Records-What-Does-the-Doctor-Order.pdf>.
6. AARP. "Chronic Care: A Call to Action for Health Reform: Patients and Caregivers Report Problems with Care." 2013. http://assets.aarp.org/rgcenter/health/beyond_50_hcr_problems.pdf.
7. Department of Health and Human Services Office of Disease Prevention and Health Promotion. "National Action Plan to Improve Health Literacy." June 28, 2010. www.health.gov/communication/hlactionplan.

Reference

Bellenghi, G. Michael. "Release of Information Services: More Than Just Copying." AHIOS. 2010. http://www.ahios.org/pdf/AHIOS_WP_ROI-More_Than_Just_Copying_updated%205112010.pdf.

Rita Bowen (rita.bowen@healthport.com) is senior vice president of HIM and privacy officer, Alisha Smith (alishar.smith@healthport.com) is health information educator, and Keith W. Thomas (keith.thomas@healthport.com) is vice president of human resources at HealthPort.

Article citation:

Bowen, Rita K.; Smith, Alisha; Thomas, Keith W. "Evolving ROI Specialists into Health Record Ambassadors" *Journal of AHIMA* 85, no.5 (May 2014): 30-35.

Driving the Power of Knowledge

Copyright 2022 by The American Health Information Management Association. All Rights Reserved.