# How Can I Help You? Top 10 Customer Service Tips for HIM Professionals

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Health information management (HIM) best practices state that it is important for HIM professionals to focus not just on the information but also on internal and external customers. Customers have varied, and ever-changing, needs that must be met by HIM professionals. Both internal and external customer service needs may be related to new technology like electronic health records (EHRs), patient portals, and mobile devices, meaning HIM professionals must be up on the latest tech developments in healthcare. Clinical providers may need guidance related to documentation-an old-fashioned but still relevant HIM issue. In addition to internal facility customers, HIM professionals have entered an era of direct interaction with patients, working to provide assistance with portals, health literacy education, and patient advocacy. With HIM in the crux of so many important healthcare developments and now working with so many different "customers," customer service has become more important than ever. Ten top customer service tips for HIM professionals should be followed to provide the best possible service to both internal and external customers.

## 1. Promote and support patients' use of portals

Patient portals are critical to creating an open communication channel with a patient's provider, their healthcare information, and other associated benefits (scheduling, bill paying, intake, and authorization forms). Patient portals are generally sponsored by providers or healthcare payer organizations. An enrollment process, including education prior to access, is common. Many organizations allow the downloading of portal information to a personal health record (PHR), and some patient portals allow for access via smart phone or other mobile devices.

HIM professionals should work to:

- Improve the continuity of patient care
- Enable communication with the patient's provider
- Facilitate prescription refill requests
- Provide patient access to their medication list, allergies, adverse reactions, and immunization information
- Involve patients directly in their healthcare experience
- Provide continuing health condition education
- Improve the overall patient experience by:

  - facilitating self-service scheduling of appointments
  - enabling communication with providers
  - allowing patients to complete initial paperwork prior to the appointment
  - facilitating bill payment
  - providing direct access to portions of the clinical record and diagnostic results

## 2. Help patients navigate the system and improve health literacy

Poor care outcomes often occur when patients are not compliant with discharge instructions, simply because they did not understand them.[1] HIM professionals are well equipped to play several roles in addressing the growing issue of decreasing health literacy levels. HIM professionals are well trained to serve as patient advocates, who use their own healthcare expertise to work on a patient's behalf and promote patients' best interests-anywhere from the doctor's office to the US Senate floor. The role of patient navigator has recently entered the HIM career path. But a patient navigator goes beyond

simply advocating for the patient-they also guide the patient through the complex healthcare system, answer insurance questions, and help overcome barriers to healthcare access.

Patient navigation helps ensure that patients receive culturally competent care that is also confidential, respectful, compassionate, and mindful of the patient's safety.

HIM professionals also have the necessary skills and healthcare education to develop educational materials that assist laypersons in navigating the healthcare delivery system and identifying reputable resources for patients to learn more about medical conditions. The US Department of Health and Human Services' Office of Disease Prevention and Health Promotion recommends health literacy interventions for youth starting as early as kindergarten and continuing through college. Note that any HIM-developed health information should use lay terms, and writing should be done at no higher than a sixth-grade reading level.[2]

## 3. When communicating with patients speak in simple language, and avoid HIM and other medical jargon

HIM professionals are generally well educated in their area of specialization. They work in a variety of roles, some of which involve communication with patients and other laypersons without medical knowledge. In order to ensure effective communication with patients, it is important that HIM professionals use simple and effective communication standards. They must avoid HIM and other medical jargon when communicating to ensure clear communication. The efforts of well-trained and caring HIM professionals will help treat patients to an overall positive healthcare experience.

## 4. Attempt to recognize variances in health literacy and be understanding

Health literacy is a term that describes more than the level at which an individual reads. It also incorporates the ability to understand instructions from healthcare providers, prescription dosage and timing, written patient education materials, consent forms, and how to navigate the increasingly complex healthcare delivery system.[3] With the emergence of the stage 2 "meaningful use" EHR Incentive Program, providers are expected to engage patients in consumer health informatics through electronic access to health information and patient portal usage. Fast developing patient-centered medical home models of care also focus on providers leveraging technology to enhance patient education and patient-provider communication.

Inadequate health literacy has been related to many problematic issues in patient care, including unfavorable outcomes.[4,5] Health literacy limitations exist particularly in the context of discerning health information.[6, 7, 8] As HIM professionals support patients in their efforts to access health information and communicate with providers via patient portals or other means, health literacy deserves attention.

Consumer education on the topic of health literacy, as well as methods for enhancing information appraisal skills, will prove valuable and may enhance consumer experiences with patient portals and other technologies. HIM professionals can improve health literacy by assisting patients with navigation of the healthcare system, improve patient knowledge of health and wellness topics, and foster patient engagement in chronic disease management.

HIM professionals are uniquely equipped with knowledge and expertise to provide this type of education through workshops, lectures, and publications to enhance public understanding of health information and emerging consumer technologies.

## More Tips in the Code of Ethics

This list illustrates the top 10 customer service tips compiled by a diverse group of HIM professionals. There are many more ways that HIM professionals may continue to improve customer service by continually striving for higher quality.

To explore additional methods for improving HIM professional customer service, carefully review the AHIMA Code of Ethics and also identify areas that reflect the AHIMA mission, vision, and values-in which the profession is well-grounded.

To view the AHIMA Code of Ethics, visit http://www.ahima.org/about/ethicscode.aspx.

AHIMA's mission, vision, and values can be found at [http://www.ahima.org/about/mission.aspx](http://www.ahima.org/about/mission.aspx).

## 5. Help healthcare consumers understand the importance of creating and maintaining a PHR

A personal health record (PHR) is a tool that a person can use to collect, record, track, and share past and current information about their own health or the health of someone in their care. AHIMA encourages consumers to collect and record their health information and past medical treatment and records in whatever format works best for them, be it paper or electronic.

While many in the healthcare industry have shifted to electronic documentation, HIM professionals must remain aware of the fact that not all healthcare consumers are comfortable with an electronic storage medium. HIM professionals should advise healthcare consumers that if they plan to share information in their PHR with various healthcare providers, it is recommended to use a digital media or software format. Many organizations allow consumers to download information from its patient portal to a personal healthcare record software application. PHR information should always be stored in a secure manner just as other confidential personal information, such as financial information, is stored. HIM professionals can direct patients interested in PHRs to [www.myPHR.com](www.myPHR.com) for complete information and help in starting a PHR.

## 6. Remain up-to-date and competent through continuing HIM education and training

HIM professionals are expected to play a critical role in the delivery of healthcare. HIM professionals plan information systems, develop health policy, identify current and future information needs, as well as apply the science of informatics to the collection, storage, use, and transmission of healthcare information. Their focus on the collection, maintenance, and use of quality data to support information-intensive and reliant healthcare systems allows HIM professionals the ability to work with clinical, epidemiological, demographic, financial, reference, and coded healthcare data. Because of this, HIM professionals must keep abreast of various trends in today's rapidly evolving healthcare industry. There are new technologies and advanced techniques in healthcare being introduced for HIM professionals to be able to deliver aptitude, knowledge, and skill for a patient-centered and positive experience. The better trained an HIM professional is, the better internal and external customer service they can provide.

## 7. Be visible and easily accessible to all internal customers, and respond in a timely manner

HIM professionals work in diverse settings with a variety of customers. Therefore, there are many demands on the time of each individual in this unit. Relationships with internal customers are essential to a smooth workflow, improved response to queries, and the customer's perception of the valuable work performed by HIM professionals. In this electronic age, it is easy to text, e-mail, or type an instant message, but there is truly no substitute for personal interaction. In most-if not all-industries, live help is the essence of excellent customer service because the customer believes that they will receive a high level of response from the individual at all times.

People skills are vital in a customer service position because internal customers will always remember their interaction with a HIM staff member. In general, customers have the ability to memorize an interaction, either positive or negative, and develop a perception of the service received based on a single incident. As a result, HIM department staff should promote their availability, accessibility, and response time to their internal and external customers. HIM ensures that all healthcare disciplines continue to work as a team to provide complete documentation that ensures accurate billing and reimbursement, and contributes to excellent patient care.

## 8. Be proactive-keep customers in the loop, and communicate HIM needs with internal customers

History has shown that many companies think of customer service as a reactionary response to a customer issue or problem. Traditionally, customer service focuses on how to deal with customer concerns after the customer is already unhappy about an issue. But this is like closing the barn door after the horses got out.[9]

Everyone is a customer at some point and therefore we know how customers like to be treated-with care. Reacting to customer service problems is generally more time-consuming and difficult than practicing proactive customer service. In

addition, a problem that festers over time has a tendency to be larger and more difficult to resolve than if there had been a proactive solution.

By proactively communicating with HIM's internal customers, the quality of service will be improved and it also may be possible to eliminate some problems before the customer is even aware they exist. Finally, proactive customer service reduces costs. Do the math: compare the cost of receiving and responding to many phone calls and e-mails to that of sending a single, well-crafted e-mail message to a targeted list of internal customers. In this manner, excellent customer service takes the approach of being part of the solution, rather than part of the problem.

Some basic guidelines for proactive communication include:

- Anticipate customer issues and/or needs
- Provide constant and consistent communication
- Empower department staff to communicate
- Remove attitudinal barriers-no "us versus them" mentality
- Recognize customer progress and/or success and not just problems or errors
- Make customers feel special

## 9. Change your voicemail messages daily, and keep up on callbacks

Maintaining voicemail is common at work, as well as in one's personal life. People leave a generic message on their voicemail for callers, indicating they are unavailable and to leave a message. The caller has no idea if you will get the message in 10 minutes, 10 hours, or 10 days. If the caller's message is time sensitive, and a delayed response occurs, it can be frustrating to the caller.

In work settings, it is a courtesy to change a voicemail message daily to let the caller know when the individual will be available to return a call. This daily message can be as simple as:

"Hello. This is Jane Doe. Today is Monday, May 6. I will be in the office all day except from 1 p.m. until 3 p.m. this afternoon. Please leave your name, telephone number, and a brief message and I will return your call_____ (as soon as possible, by the end of the work day, etc.)." Although changing your voicemail message daily may seem time consuming, it usually only takes moments and is helpful to one's customers.

If a HIM professional will be out of the office all day, but checking voice messages, that information should be included in the message. When you will be away from the office for longer than a day, an out-of-the-office message should be left indicating how long you will be out of the office, if you will be checking messages during this time, how frequently you will check messages, and who the caller should contact for assistance in your absence.

## 10. Seek feedback regarding HIM customer service

Customer service feedback should address the satisfaction level of individual customers and provide a mechanism for comments about services provided and customer care. In order to ensure that the customer's impression of the HIM department and its staff members is positive, it may be valuable to examine how the department views the customer. Do department members see the customer as an interruption to a carefully scheduled day, or is one's internal customer a welcome part of the healthcare delivery team? Each customer wants, or in some cases demands, the attention that he or she deserves. This is especially true with respect to physicians and mid-level providers that are the typical HIM customer-they want to believe that their concerns are heard and that the department takes their work schedules and other responsibilities into account when requesting time or information.

A customer's trust is not to be taken lightly, and internal customers should be a primary focus for the HIM department. After all, these are the individuals who will be repeat customers for months, years, or even decades. Trust can be a fragile commodity and easily destroyed by an abrupt attitude or condescending remarks.

As a result, it is not enough to provide customers with just the "expected" experience. Instead, all HIM individuals should strive to exceed customer expectations. Also, all HIM employees, including the HIM director, should demonstrate a commitment to

customer service. An executive who does not personally interact with customers is likely to be detached and unaware of the customer service work performed in their department. It pays to remember that excellent customer service is about leaving the customer happy.

## Notes

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