

Making the Clerical Transition to e-HIM

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As we move forward with the developing electronic health record (EHR), the emphasis on changing work processes, increasing productivity, and eliminating many paper-driven tasks may leave clerical staff fearful of an uncertain future. Helping clerical staff understand how their current skills and knowledge translate to the e-HIMTM environment, as well as how to develop new skills, can help alleviate fear of the unknown and build optimistic anticipation for new roles.

Transforming Tasks and Skills

Ensuring the collection of complete, accurate, and timely health information encompasses dozens of tasks. Paper document management includes patient and document identification and location, repair, retrieval, matching, integration, and record merging. Record processing requires resources to control, process, duplicate, distribute, store, and retrieve information from multiple and often remote locations.

Many of these tasks are being replaced by automated record management systems. Others have been modified and transferred to the electronic environment, such as identifying and processing records that are eligible for transfer or destruction, assessing records for completeness, and managing record completion queues.

Cognitive skills will continue to be applicable in EHR management and include familiar skills such as comparative observation, critical thinking, numerical, problem solving, decision making, and interpersonal and communication skills. However, new required skills may include greater technological literacy and training.

Consider the following clerical tasks and how each will transform in an e-HIM environment:

Record Control. If working in a hybrid environment, clerks may continue to run records to the emergency room and pick up discharges from nursing units. In an e-HIM environment, securing visit records for patients receiving care will still be needed. A comparative audit between the list of new records created or files opened online and the activity census or appointment schedule must be performed to ensure a visit record is established in the EHR for each patient. An exceptions report will also require review and follow-up to ensure an electronic record folder is established for each patient stay. This process will use the same critical-thinking, comparative, numerical, and problem-solving skills that were applied in the paper environment.

Document Capture. Support staff members will use current skills to confirm that a standardized list of documents has been created or received and is accessible as part of the EHR. Although many record documents are electronic, it is expected that there will always be a small number of paper documents received from other sources, and requiring integration with the EHR.

Staff will continue to prepare and repair documents, now for scanner feed. Document preparation for scanning requires observation and dexterity in the way assembly did previously. Outline the steps in the process compared to what was done before, highlighting new steps and steps that are no longer used. By comparing familiar activities, organizations will create a comfort level for staff learning new processes. Once an image is captured, observation and critical thinking skills are applied to assess the image and improve its quality. Include the more detailed disclosure process components, such as cropping or sizing an image, adjusting color, rotation, and resolution.

Record Indexing. Whatever the indexing order or folder structure, it needs to be simple and familiar to the employees who will be retrieving information or filing the documents. Steps in document indexing reflect the previous record assembly process, from confirmation of unique patient identifier to matching patient visit dates established within the EHR to choosing a section or document type to categorize the page. Categorical, numerical, or date-driven methods may be used to identify the document type, record section, or service date.

Distinct assembly order may continue to exist to accommodate EHR viewing and printing requirements. Compare the online indexing tree to previous assembly order. Fastening the document into the folder will now be in the form of saving the image to the correct patient encounter. Reinforcing users' needs will increase employees' confidence with electronic indexing tasks. Explain how the record is used. This will drive how employees are to organize the pages in the EHR.

New Education Tools for a New Environment

Different people learn in different ways, and organizations must try to create a communication tool for staff to learn new information no matter what kind of learner they are. Create a multifaceted learning experience for the group. Ask each person to choose a task of the process and teach it to the rest of the group. These skills will increase employee confidence when called upon to impart their knowledge to coworkers, relief staff, and students. Each mastered task will increase confidence and decrease levels of fear associated with the new EHR work processes.

Ask your employee training department for ideas to help deliver information in interesting ways. We can absorb new information through reading, seeing visual images, listening, speaking about new information with others, or by taking action, either by documenting or doing the task.

Ensure your support staff can access an HIM professional on an as-needed basis. Their roles are changing, and reinforcement of how their work interfaces is part of the big picture of healthcare delivery. How HIM interfaces with other departments and users is just as important as ever. A working knowledge of guidelines or rules for decision making builds confidence as they understand why certain actions are taken and decisions are made. Help them understand how the HIM application suite uses data to support related processes, and most of all, let them know there is an HIM professional available to support them.

With support and guidance, a cognitively skilled pool of individuals will be developed, available, and ready to work in the transition to the EHR. Identifying where knowledge gaps exist provides focus for training programs both before and during change. Sharing how employees already possess skills and understanding needed for the electronic environment will help them embrace change and continue to develop needed skills and knowledge. They will experience learning opportunities, challenging work, and personal reward as they relinquish their fear. Increasing an individual's value in the e-HIM labor market can translate into confidence, job satisfaction, organizational commitment, and increased productivity—a win-win by anyone's definition.

Translation, Please

Creating a poster with a translation table can benefit staff working through the transition to electronic health record processing. Display a comparison of familiar health record terms and their electronic counterpart with both text (words) and images (graphics, flow charts, photographs).

Include comparisons for physical storage and process:

Archive = Repository
Permanent file = Server
Photocopying = Scanning
Assembly = Indexing

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Article citation:

Lambton, Karanne. "Making the Clerical Transition to e-HIM." *Journal of AHIMA* 76, no.5 (May 2005): 54-55.

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