

# Managing the Virtual HIM Department

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by Laura Lane Walls

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*In the new world of remote work forces, old management principles still apply. The trick is to apply them in entirely new ways.*

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Many health information management professionals don't work anywhere near their "place" of employment.

They are remote workers, performing daily tasks from their homes or off-site offices. More and more HIM departments are going virtual as healthcare organizations opt for the benefits of off-site employees.

As managers lose sight of the staff they manage, new organizational challenges arise. Making a successful transition from a traditional workplace to a virtual one requires that managers adapt and accommodate. They must be willing to think in new ways about traditional functions such as measuring productivity, confirming hours worked, communicating with staff, and conveying feedback.

Standard management principles still apply, the experts say. The key is to adapt how principles are implemented. Above all, ongoing feedback and support are vital to maintain the connection between managers and their remote workers.

## Virtual Staff, Visible Benefits

Carroll Schnabel, RHIA, knows the challenges and benefits that can come with a remote work force. As a privacy officer and director of HIM at San Juan Regional Medical Center in Farmington, NM, she oversees workers not in her daily sight.

The benefits of a remote HIM work force are many, Schnabel says. The biggest is improved availability of information for patient care. "Record completion is more timely, and documentation is more accurate," she reports.

That's a familiar experience. Most companies that employ remote workers see productivity gains, according to Jack M. Nilles, author of *Managing Telework: Strategies for Managing the Virtual Workforce*.

Productivity increases, Nilles says, because of greater flexibility for remote workers, fewer and shorter yet more productive meetings, the streamlined electronic transfer of routine information, and the absence of a possibly adversarial on-site relationship that can exist between managers and workers in a traditional office.

Add in a big reduction in overhead costs associated with on-site staff, and a remote work force starts to make a lot of sense.

Staff benefit from working off site, Schnabel points out, because it can allow them greater flexibility in accomplishing their work, such as arranging their work schedule around a child's school day or better accommodating an appointment in the middle of the day. That kind of flexibility raises morale and lowers turnover rates, says Schnabel.

The remote work force is the future for many HIM professionals, agrees Mark Dietz, RHIA, a HIM consultant based in Minneapolis. Dietz notes that an organization's ability to coordinate an off-site work force may expand its staffing choices. "You can get the qualified people that you need, wherever they happen to be," he says.

Dietz was involved in setting up a remote staff in the Philippines that categorizes and organizes medical information contained in legal files regarding smoking-related health issues and lawsuits.

The "extreme remoteness" of this particular staff, Dietz found, offered an additional benefit—faster records processing. Because of the 12-hour time difference between the Philippines and the US, work scanned to the workers in the Philippines

could be processed during their shift and waiting for the US workers when they arrived at work the following morning.

## Rethinking Required

Not everyone is ready for the switch. Managing a remote work force requires organizational change, and overcoming resistance to change can be difficult.

“My biggest challenge has been showing the stakeholders what the advantages are for them,” Schnabel says. “Often, the end user can see the advantage long before department managers can.”

Schnabel also notes that people are creatures of habit. Even once administrative support is secured and end users have been involved in the planning, she says, people may “revert back to ‘the way we have always done it’ or will work around the system or procedure without letting the manager know.”

Schnabel believes that organizations had better meet the future squarely. She encourages health information professionals to embrace the new era and step up and assume responsibility for educating administrators, the general public, and physicians about the value of remote work forces in the HIM environment.

Like Schnabel, Dietz believes that the health information management industry has been slow in embracing the idea of an off-site work force. It’s a big change, and the practice requires a lot of planning. “All of sudden, you don’t have staff right there, resources to call upon if you want to change your activities or focus. Hospital management function is then very different,” he says.

## Getting off to a Good Start

Managing an effective remote work force begins with establishing expectations and providing good training. Employees who believe they have the ability to successfully carry out what they have been assigned to do are the key to a successful virtual department, according to a study conducted by D. Sandy Staples from the University of Melbourne and John S. Hulland and Christopher A. Higgins from the University of Western Ontario.<sup>1</sup> The study’s authors found that remote employees’ own assessment of their work situation plays a critical role in their effectiveness, job satisfaction, and their ability to cope with the challenges of working remotely.

Providing remote workers with the support they need requires that organizations rethink traditional communication and management processes. Daily business issues such as determining pay, measuring work output, and reviewing work performance can be difficult to manage unless managers are willing to stretch their minds, Schnabel says. “Start with an off-site use manual so that the staff, the facility, and the vendors have everything spelled out and surprises are minimized.”

Schnabel recommends that duties and job responsibilities be clearly documented, covering such issues as rate of pay, software and hardware requirements, training in federal privacy regulations, and an employer-employee contract outlining what is expected from each party. Job descriptions should be up to date and should include collateral issues such as follow-ups, performance standards, and national benchmarks.

An abundance of autonomy can challenge off-site workers to discipline themselves. Some companies increase incentives for virtual employees in order to keep initiative high. Nilles notes that productivity gains were higher when remote workers were well paid. Netifice Communications, a company that builds infrastructure for remote workers, pays cash bonuses to its 12 employees when they meet their production goals.<sup>2</sup>

A commitment to thorough training is essential. Schnabel recommends creating a training site in an area outside the HIM department if possible. A remote site gives trainees the opportunity to troubleshoot the types of off-site software and hardware issues they will experience from their own locations. That opportunity will result in fewer problems—and an improved ability to fix problems—once the workers get home and get to work.

There can be technological challenges, too, when remote workers are very remote. Companies must decide who pays for necessary technology such as DSL and broadband connections for workers in rural areas, for example.

Deitz stresses the importance of ensuring that the technological pieces are in place before workers go virtual. A sufficient computer infrastructure must be up and running, and home-based hardware and software must be fully functional.

In Dietz's Philippines project, the company was "willing to build the bridge to make this happen," Dietz says. The transition was made easier because the company had a remote-ready integrated computer system already in place—allowing scanned records to be transmitted—and most of the workers hired had previous medical experience.

Dietz helped train the 27 employees during an intensive three-week period, after which they were ready to tackle their assignments. The company simply transferred the information, and the off-site employees took it from there. "The transition was very logical," Dietz says.

## Keeping in Touch

Perhaps most important to an effective virtual work force is frequent communication between managers and staff.

Managers of remote workers must adjust to not being able to see employees and to check in with them in person. Managers may require a little time to get used to not seeing staff members doing their work. Some businesses, such as Birdsall Interactive, address this by installing online time clocks that employees use to log their hours.<sup>3</sup>

The ultimate goal for managers is learning to focus on their remote employees' work results, output, and how effectively they do their jobs. Schnabel uses software with the ability to review and monitor workers' performance, and staff members are kept aware of how they are doing in meeting their goals. Dietz notes that software can set standards, measure output, and oversee employee production.

The daily workplace exchange of ideas changes from face-to-face discussion to a computer-to-computer exercise in virtual departments. E-mail and instant messaging are integral parts of keeping in touch. Managers send messages, data, and updates to individuals and to the entire group of employees, often throughout the day.

Regular status calls matter, Dietz stresses, even if it's just five minutes of "everything looks good" or talking about records that did not get processed or about technical issues. Frequent contact is especially important in the initial months of remote work. "Communication is very important when you start this process because the first three months are a learning curve for everyone involved," Dietz says.

Some managers communicate with workers during conferences by telephone or by video. Most managers meet with remote workers periodically, doing business the old-fashioned way—in the same place.

Frequent communication does more than keep managers and staff apprised of work progress, it also helps remote workers feel less remote. Making workers feel connected, like part of a team, is crucial to the success of the remote workplace, says Schnabel. That extends to office visits. "Communications—the telephone and e-mail—help, but staff need to come on site frequently to stay in touch."

Teleconferencing, video conferences, and frequent telephone calls to check in are vital components that go a long way toward helping workers feel a part of their place of business, Dietz says.

Educational and social events with the combined staff ease the isolation some experience in working off site. Schnabel has used Web-based seminars to interact with staff who cannot travel to the base office.

Working together closely is the key to working together remotely.

## Notes

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