

# New Records Opening to HIM Professionals: Wider Content and Record Management Initiatives Offer New Roles

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by **Chris Dimick**

Gradually HIM professionals are expanding their roles to advise, manage, and regulate nonclinical records through enterprise-wide content and records management initiatives. The principles and practices that HIM professionals bring to managing electronic clinical data and records can make them a natural fit for managing the business needs of a wider variety of information.

Some HIM professionals have fully transitioned into roles managing records systems across their entire organizations, taking roles such as enterprise content managers. But more commonly, HIM staff in organizations that implement content and records management initiatives gradually interact with wider ranges of alternative clinical and nonclinical records.

They may start out directly managing all clinical record-producing systems such as e-mail, speech files, and other records not commonly included in a legal health record. Typically their interaction with nonclinical records begins by offering advice to other hospital departments on the best ways to manage their electronic record systems.

## ECM Initiatives Offer HIM Opportunities

Managing information holistically across a healthcare enterprise can increase information value, reduce risk to patients, and improve operational efficiency. Content and records management is a way to capture, structure, store, and retrieve record content across an organization. Organizations often employ enterprise content management (ECM) tools to do that.

HIM professionals are finding many new and revised roles within such initiatives. That's because they possess a unique set of skills to help with systemwide implementation and management, according to Susan DeCathelineau, MS, RHIA, healthcare solutions manager for Hyland Software, an ECM software company based in Westlake, OH.

"I think the skill set in the HIM professional of being able to collaborate with others, to have the attention to details, to understand the importance of record management, and the security of that documentation all lead into a very successful transition into the ECM environment," DeCathelineau says.

HIM professionals should not be afraid of such roles just because they deal with records and information not normally seen in the legal health record, DeCathelineau says. Seven years ago she made the switch from HIM to ECM work.

A former HIM director and consultant, DeCathelineau was hired to lead a project team that implemented an ECM solution at Allina Health System, based in Minneapolis, MN. Working as the corporate information services manager at Allina, DeCathelineau was responsible for implementing an ECM system in the registration, clinical, and billing areas as well as various administrative departments including human resources and accounts payable.

Though it was a new undertaking beyond the usual HIM work, DeCathelineau embraced the change and has loved it since.

"Allina really helped stretch that [HIM] expertise into being able to look across the HIM department into other areas and implement content management in those business units," she says.

Working with ECM tools gave DeCathelineau a new perspective on general information management. She realized that integrating records of all types could help providers and the healthcare organization function. "When we think of content management, it is not just the conversion of paper documents to electronic, but really being able to centralize that content into a repository that is integrated with an organization's line of business applications," she says.

Content and records management work is already coded in the DNA of HIM professionals. DeCathelineau's transition to using ECM tools was helped by the fact that she already knew how to manage, organize, and structure record content.

## New Roles for HIM Professionals

Systemwide content and records management initiatives introduce several new roles that are a good fit for HIM professionals. One example is business analyst. Business analysts meet with an organization's different business units and help design and implement ECM solutions for that department.

At Allina, HIM professionals transitioned or were hired into these analyst roles and worked with areas including human resources and accounts payable to implement ECM. "They were able to leverage their skill sets to help other departments," DeCathelineau says.

HIM professionals are also a perfect fit for ECM manager roles. "I think it helps broaden that HIM professional's role in being an expert in content," DeCathelineau says. "Not only from a medical record perspective, but content overall. They understand retention guidelines, the importance of maintaining documentation, and having it accessible to the end user when appropriate."

New roles exist within the HIM department itself through ECM implementation. Those not interested in nonclinical records can become content managers focused entirely on clinical information, DeCathelineau says. While working with clinical records, content managers also advise other healthcare business units on how to implement their corner of ECM.

In fact, when many organizations implement ECM, typically the different departments retain management responsibility over their own records. The enterprise content manager helps direct the implementation and advises those department staffers on how to best manage and retain their records, DeCathelineau says.

Direct interaction and modification of nonclinical records, like human resource job application forms, are left to the subject matter experts, according to Christina Rupinta, MS, RHIA, corporate service line health information manager at Orlando Health, based in Orlando, FL. "ECM, to me, is very large and will rely on the expertise of many to ensure that it is implemented correctly," she says. "It will be a team approach."

The content manager mainly serves in a technical role, helping design the system so those departments get better functionality and interconnectivity with the organization. Background knowledge in how different healthcare departments operate is helpful, but working with ECM solutions does not require one to be an expert in business or administration. An HIM professional looking to work with ECM must possess analysis skills and be able to think strategically about workflow redesign, DeCathelineau says.

## Advising on Information Management

The HIM department at Orlando Health is preparing to assist other organization departments when ECM is implemented at the facility. Orlando Health is currently in talks with its electronic health record vendor and is in the planning stages of implementing a systemwide ECM solution that will affect all departments next year. Meetings have been conducted between HIM and other departments such as risk management and the medical affairs administration department regarding how to best leverage ECM technology, Rupinta says.

Currently, Orlando Health's HIM department is focused on using ECM to improve its clinical electronic health record system. The organization is working toward an integrated electronic system that will reduce the number of entry points needed to access electronic information from different clinical departments, says Michael May, MBA, RHIA, HIM corporate service line manager for the revenue management document imaging center at Orlando Health.

The Orlando Health HIM department expects to have a mainly advisory role during and after ECM implementation. "We may get into some of the more management of it, but a lot of it is to ensure the integrity of the data is maintained," May says. "Because there are the things, as far as an HIM side, we don't normally interact with on a daily basis. It is just making sure it is available when they need it, that it is secure, et cetera."

Orlando Health has already dipped a toe into the ECM pond. Last June the HIM document imaging area began to handle patient accounting documents and in February assumed responsibility for processing and managing physician practice business

office documents. The move was done to streamline redundant business practices, May says. Areas such as patient accounting had been electronically imaging their own records. It made sense to send that work to the HIM imaging department.

The change required some learning by the HIM staff. Used to working with only clinical electronic systems, the imaging staff is now learning the business applications as well. The learning has been a two-way street, May says. The business staff learns what HIM needs to properly manage their information, and HIM learns how business staff use certain information.

“Now we are just learning the nuances of their documentation,” May says. “It wasn’t the medical record and we weren’t familiar with that documentation, but we were familiar with imaging and capturing data.”

As Orlando Health’s electronic record system grows across the entire facility, May sees more departments—clinical and nonclinical alike—sending their imaging to HIM. While HIM does manage nonclinical records today, it does not conduct analysis or provide release of information on those records. Those functions are done by the department that generates them.

## Perfect Fit for HIM

At Denver Health and Hospitals in Denver, CO, the HIM department has also edged into ECM work. Amy Richardson, RHIA, the HIM/EHR applications director at Denver Health, has worked to track which electronic systems feed information into the legal health record.

In the process, the HIM staff found clinical applications that merely stored information in their own siloed databases. Richardson is working to reduce the number of siloed data collection points and create a single record storage location—the beginning of ECM work.

One way to prevent siloed systems is to address connectivity before system purchase, something Richardson now advocates during system purchase talks to ensure a legal and complete medical record, she says.

This effort is the first step to developing truly centralized document management and storage, and it is a type of ECM work most HIM professionals can do today at their organizations, Rupinta says.

In her current role at an ECM software provider DeCathelineau has seen several HIM professionals transition into roles working with ECM and love the work. ECM is for HIM professionals who enjoy organizing documents, she says, people who like to take disparate record systems and develop a clean, orderly, and centralized system.

The first step is getting in at the ground level.

“When we have gone to different perspective and customer sites, we often see the HIM director and management team involved in the [ECM] selection process as well as the implementation process,” DeCathelineau says. “So [HIM professionals] really have been seen as key leaders in ECM adoption at their organization.”

Though ECM roles can be technical, that is not a reason for HIM professionals to shy away, May says. ECM is content management and takes information management skills. “Just because you work on a computer doesn’t mean [ECM] needs to potentially be a technical role,” May says.

HIM professionals understand who needs to get access to what information, who is allowed to have access to information from a regulatory and legal perspective, and what the clinical needs are for accessing information, Rupinta says. “I think that puts us in a very good position to be able to help ECM be useful in an organization,” she says.

HIM professionals have the business sense for content and records management already, the technical aspects can be learned along the way, Richardson notes. “[It] has so much to do with what we as HIM professionals have done all of our life in the paper world,” Richardson says. “It floors me that just because the term electronic is in front of that, everybody seems to think there are some magical solutions.

“Really, it is going back to the basics [of HIM].”

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