Partnering for Productivity with the IT Help Desk

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By Mary Teslow

The IT help desk is an ambassador for any IT-enabled project. It plays a key role in maintaining user productivity and satisfaction in today's increasingly complex and rapidly changing health IT environments.

HIM professionals have much to gain by partnering with the help desk—from enhancing the productivity of functions such as transcription and coding to promoting the acceptance of major new technologies such as EHR systems. In addition, HIM professionals will be assisting with an influx of novice IT users, including facility staff new to EHRs and patients using portals to access their personal health information or maintain their personal health records.

Understanding how the help desk works and adopting best practices when contacting it will help HIM professionals form productive help desk partnerships.

How the Help Desk Works

Technological advances and federal incentives for health IT adoption are moving the EHR within reach; however, this progress doesn't guarantee a trouble-free IT environment. Problems are inevitable. When issues arise, users turn to the IT help desk as a single point of contact.

HIM staff needing to resolve individual problems and HIM managers wanting to support them will benefit from understanding how today's help desk works. This knowledge can also help HIM managers create effective partnerships with the help desk.

Similar to computing itself, the IT help desk has gone from simple tasks to complex functions and is now viewed as a service center. Noel Bruton provides a definition for this expanded function in *How to Manage the IT Help Desk:*

> User support is a specialist function which retains, on behalf of the company's user population, technical knowledge about IT and the way the company uses it, in order to deliver that knowledge in a focused form to solve specific technical and business problems in both a reactive and proactive basis, such that user productivity is maintained and enhanced, thereby further enabling the user to contribute to the company's business goals.

Typical help desk contact is via phone, with e-mail and web forms becoming more common in larger organizations. The user's data is entered into a specialized database. In-house systems can populate user demographics, similar to patient registration, including the client's hardware, software, role, and location. Details are added, and a service ticket is generated with a date and time stamp.

The analyst generating the ticket "owns" the contact and attempts to diagnose and resolve the problem. Should additional help be needed, the analyst escalates or hands-off the contact, according to the tiers described below, and ownership is passed along. By reviewing how more complex issues are resolved, front-line analysts can expand their knowledge. Alerts are generated when problems are not resolved within specified time frames.

IT faces staffing and budget challenges familiar throughout healthcare. To maximize staff resources, sequential service tiers are often used. Where resources permit, self-service portals may be added for easy access to knowledge resources and training materials, thus saving staff and the user time waiting in a queue. Portals may include the option for users to open their own tickets and reset their passwords. Business process rules manage the tickets and appropriate time frames. Emory Healthcare, part of Emory University in Georgia, provides a robust example:

- **Tier 0:** Self-service intranet or internet portal with knowledge resources, password reset, and ticket initiation.
- **Tier 1:** Staffed by entry-level analysts providing basic service and able to resolve most issues.

- **Tier 2:** Assists tier 1 staff, providing more advanced troubleshooting. This level may use tools for diagnostic testing and remote control of users' systems.
- **Tier 3:** Assists tier 1 and 2 staff, also preparing for solutions to new or unknown issues. They may identify issues that cannot be resolved and recommend alternatives.
- **Tier 4:** Not broadly used, escalating issues beyond the organization, typically to a vendor, which may involve a service level agreement.

In addition to tiers, the IT help desk may identify organization-specific "call types." A large health system may have more than one hundred different call types; for example, a physician in the emergency department with an EHR issue. After the tier-1 analyst identifies an appropriate call type, the ticket is routed to a specialized technician or team.

Service desks use a variety of key performance indicators to measure their effectiveness. KPI examples include time to respond, time to resolution, and first-call resolution. Similar to transcription line counts, first-call resolution standards vary, but they are typically between 70 and 80 percent. It is essential for all contacts to be tracked—even if they are resolved quickly—to ensure complete reporting.

Customer service surveys are another important metric, as Bruton notes. The convention for customer service surveys is to ask five questions: courtesy of the analyst, technical skills or knowledge of the analyst, timeliness, quality, and overall experience. HDI, an IT service and technical support membership association, offers survey resources.

Tracking, trending, and benchmarking KPIs helps identify training needs to promote productivity and satisfaction of both help desk staff and end users. Training for help desk staff on new hardware, software, and knowledge resources is routine. As the help desk moves away from the "techie in the corner" to becoming a customer service hub, soft skills are increasingly important, including communication. Scripting encourages consistent communication.

Best Practice Tips for Help Desk Contacts

Since IT problems and contacting the help desk are inevitable, users can be part of the solution by being prepared and polite. Most analysts have to maintain an average call length. If they spend the first few minutes waiting for users to get organized, the time devoted to actual help may be rushed.

- **Stay aware of self-service resources.** If a self-service portal is available, check it occasionally for new resources, training, productivity tips, et cetera. You'll be better prepared when you need something urgently.
- **Follow policies and procedures and use common sense.** If your company doesn't support personal computers, don't expect tech support. Don't download unapproved and unsupported software. Remember, company computers belong to the company; the company is paying to support business workflow, not personal use.
- **Record any error message.** Some errors are timed and will disappear before you reach the help desk. The exact text of the error will often pinpoint the cause of the problem.
- **Create a screenshot.** Place the image into a document along with your name, date, and annotations. Save it with a clear file name. Let the analyst know you have a screenshot or add it to a portal ticket.
- **Save your current work, back up critical data, then reboot.** Leave the system off for a minute or so and then reboot. Restarting often solves many random problems and gives the system a fresh start.
- **Don't go too far on your own.** Users may not be as capable as they think. This can lead to problems for analysts if users who lack technical knowledge have tried their own fixes. Contacting the help desk can be an advantage for the user and the organization.
- **Check that you have the time for troubleshooting.** If you can't be seated at your computer for 10 to 15 minutes, it's best to wait until you can give the tech your complete attention. Try not to put the tech on hold or speak to others during the call.
- **Introduce yourself and be polite and professional.** Analysts are likely to spend more time and effort on your issue. Keep in mind that most help desks record incoming calls.
- **Explain the problem with key words.** Define the problem as precisely as possible. Use key words, such the program name and version. Techs typically enter them into a knowledge base to locate a solution or select a referral. Mention any error or screenshot. Be honest if you've made a mistake that created the problem. The solution will be found more quickly.

- **Be patient and follow the process.** Troubleshooting is a form of systematic problem solving that starts with assuming nothing. Analysts are trained to follow basic steps before moving on. This is because there are often simple techniques that can resolve seemingly difficult problems. Most basic troubleshooting takes less than 5 or 10 minutes. Take the opportunity to ask a couple of questions to increase your knowledge.
- **Listen closely to instructions and write them down.** When the analyst gives instructions to fix the problem, listen closely. Write the steps down and save as a resource should the problem occur again.\
- **If necessary, ask for another analyst or escalation.** If you can't understand the tech, request another. If the analyst can't help you within a reasonable amount of time, request escalation to the next tier.
- **Document your incident.** Ask for the ticket number and the analyst's name and write them down along with the date and time. If there is a referral, ask for that name as well. Some systems provide automatic e-mail confirmation. Once an incident has been created, it cannot be deleted.
- **Follow-up, if necessary.** Occasionally, issues are more complex and need more time for resolution. Ask for a time frame, being honest about the urgency of your need. Don't overstate your personal need. Follow up as needed.
- **Say thank you and answer the survey.** Ideally, your problem will be resolved or the analysts will have tried their best. In either case, be sure to say thank you. Answer any customer service survey—it adds to the metrics.

Creating an HIM-Help Desk Partnership

Health information professionals have long understood the importance of partnering with patient access and the business office. There are similar benefits from partnering for productivity with the IT help desk.

As individuals, following the guidelines provided above respects the established business processes and organizational resources. HIM team leaders or managers can add the IT help desk as a topic for a monthly meeting. Supervisors can ask staff what issues they are experiencing, if any, being sure to include staff working remotely.

Department managers can invite help desk staff to the department to better understand HIM operations. An HIM staff member can attend an IT staff meeting and serve as a resource. Recommendations can be made for improved self-service content or additions to the knowledge base used by analysts. Managers can be an advocate for their staff and for the IT help desk.

HIM professionals in a leadership position may consider going even further. If an advisory committee exists, offer to serve. If not, suggest its creation. Encourage reporting of help desk metrics to the user community. The help desk is the front line for complaints. Monitoring trends can offer early warning signs of issues leading to prompt intervention and resolution.

Be proactive and share issues discovered from your staff as well as clinicians, administrators, and other colleagues. Include support considerations when purchasing or upgrading systems. Consider the help desk when planning for business continuity.

If the IT department produces an internal e-newsletter, suggest tips and shortcuts that can be included. If the organization uses call types, there may be appropriate opportunities to suggest categories for user prioritization. It is important to maintain awareness of the organization as a whole and not just HIM staff.

Healthcare organizations are increasingly evaluating staff on values criteria such as teamwork and service. Regardless of your role in the HIM profession, consider highlighting how partnering with the IT help desk has created more positive relationships, improved service, and contributed to increased productivity and achievement of organizational goals.

Becoming a Help Desk Champion

The help desk is an ambassador for all IT-enabled projects, particularly the EHR. Even a project implementation delivered on time and under budget can get a bad reputation if adequate user support is lacking. The federal program to incentivize providers to use EHRs will create a heightened need for help desk assistance. Meaningful use will require meaningful support.

HIM professionals can be available to answer questions from the help desk and thank them for calling issues to your attention. Thank the team for adjusting to the latest upgrade, rollout, and so forth. Celebrate the IT help desk when trends are going particularly well and tell others.

TechRepublic summarizes one of Gartner's key predictions for the next five years: "IT will need to tie its activities much more closely to measurable business results and operate more in the open rather than locked away in the secret laboratory of the server room or IT office." HIM can be proactive and extend the invitation.

References

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