Productivity Report Streamlines Management

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by Gwen Hughes, RHIA

Twenty years ago, HIM department leaders often directed one or more departments within a facility or on one campus. It was rare to find them managing at multiple sites. Today, however, it is not unusual to find HIM professionals managing HIM and/or other departments throughout entire enterprises. And with these opportunities come new challenges: we find ourselves needing to devise tools that will enable us to stay abreast of activities at numerous sites in minimal time.

HIM leaders at St. Joseph's Healthcare System in Albuquerque, NM, developed a tool that reports workload and performance on a daily basis. Using an electronic spreadsheet accessible by each facility, department leadership gets a sense of what is happening throughout the HIM enterprise: they learn the volume of work coming in and being processed at each facility, how well the departments are performing compared to departmental standards, and when to make inquiries about potential bottlenecks, adjust staffing, make on-site visits, or plan other intervention.

Here are the steps to create your own HIM enterprise productivity spreadsheet:

First, **using performance standards and department goals, make a list of items to track daily to effectively monitor and manage department performance**. For example, an HIM system director for five hospitals across an enterprise might establish the following goals and objectives for Facility A:

1. 100 or fewer incomplete charts
2. $100,000 or fewer in accounts receivable
3. dictation will be transcribed and available on the nursing unit within 24 hours
4. loose filing will be charted within 24 hours of receipt
5. coding will be complete within 24 hours of discharge

To avoid backlogs when the above goals and objectives are not met, the HIM director might also add:

6. quantity of loose filing to be charted
7. number of dictated reports to be transcribed
8. number of days yet to be coded

To track potential workload and anticipate staffing needs, the HIM director could include:

9. number of inpatient discharges
10. number of same-day surgeries and observation patients
11. number of emergency department patients
12. number of other outpatients

And to manage the salary budget, the HIM director could include:

13. hours worked
14. actual full-time equivalents (FTEs)
15. budgeted FTEs
16. daily FTE budget variance
17. month-to-date FTE budget variance

Now, develop a spreadsheet (see "Sample Departmental Productivity Report," below). Insert formulas to retrieve data or make calculations. For example, items 14-17 can be calculated by the spreadsheet software after entering formulas.

- to turn hours worked into actual FTEs, divide by 8
- compute budgeted FTEs based on organization-specific formulas, then calculate the variance by subtracting actual FTEs from budgeted FTEs
- provide a cumulative month-to-date budgeted versus actual FTE variance by adding cumulative budget variance for the previous day within same month and budgeted FTEs, then subtracting actual FTEs.

Now copy the worksheet, creating one for each month of the year and one for each facility in the enterprise. For the most part, items 1-5 can be populated by individuals in the HIM department. If your facility's information systems are fairly sophisticated, however, you might be able to develop software to automatically populate several of these fields using information supplied by other facility software programs.

Repeat the process of list and spreadsheet development above for the other facilities in your enterprise. Then, **decide who will be responsible for completing and submitting the data at each facility on a daily basis.** The individuals selected might be managers, supervisors, leads, or clerical staff. There may even be a need to have more than one individual at each facility completing components of the worksheet. Consider designating alternates for those instances when individuals with primary responsibility are absent.

Develop procedures for accessing, completing, correcting, and saving the report. Procedures should be written, placed in the procedure manual, and include the time of day in which some or all of the data must be reported.

Train the individuals assigned to access, complete, correct, and save the report. Provide the individuals being trained with copies of the written procedure. Allow them to practice using the spreadsheet and to ask questions. Agree to an implementation date. During the initial phase, watch closely to make sure that those reporting understand the process. When on site, make sure that the data reported matches that which is observed.

How to Create an Enterprise Productivity Report

1. Determine what needs to be tracked on a daily basis
2. Create a worksheet for each month and each facility
3. Designate who will be responsible for reporting the data
4. Develop procedures
5. Train the individuals responsible for data submission
6. Implement the production monitor
7. Monitor data reported against actual observations

Implementing any new process accurately and consistently can be challenging at first. Once the process is in place and performed correctly, however, the enterprise productivity spreadsheet is invaluable. When I worked in an interim position at St. Joseph's Healthcare System, this spreadsheet provided information about what was happening in the various HIM departments, alerted me to where I needed to apply additional resources, and provided me with a tool for reporting progress to administration and performance data to the medical record committee. I encourage others to give it a try.

sample departmental productivity report

Facility A		February										
	Goal	2/1	2/2	2/3	2/4	2/5	2/6	2/7	2/8	2/9	2/10	2/11
Performance Indicators												
number of incomplete charts	<100	90	85	80	75	70	80	90	95	85		
dollars in accounts receivable	<100,000	98,000	97,000	96,000	95,000	94,000	95,000	96,000	97,000	96,000		
average transcription turnaround in hours	<24 hrs	23	22	21	15	13	15	18	23	20		
average loose filing turnaround in hours	≤24 hrs	24	24	24	24	24	24	24	24	24		
average coding turnaround in hours	≤24 hrs	48	48	36	24	24	36	36	48	36		
Backlogs												
number of inches loose filing	≤2"	6"	3"	2"	2"	1"	2"	4"	5"	3"		
number of untranscribed dictated reports	<60	100	90	80	70	60	60	70	60	50		
number of days charts not coded	1	5	4	3	2	1	2	2	2	1		
Workload												
number of inpatient discharges		1000	950	1100	1200	1300	700	1100	1200	1150		
number of same-day surgery plus observation patients		100	99	98	97	99	0	0	101	95		
number of emergency dept. discharges		500	450	475	499	498	600	650	550	400		
number of other outpatient encounters		1000	998	995	1000	990	40	30	997	800		
FTEs												
hours worked		904	904	904	904	904	904	450	880	904		
actual FTEs		113	113	113	113	113	113	56.25	110	113		
budgeted FTEs		100	95	110	120	130	70	110	120	115		
daily FTE variance		(13)	(18)	(3)	7	17	(43)	53.75	10	2		
month-to-date FTE variance		(13)	(31)	(34)	(27)	(10)	(53)	.75	10.75	12.75		

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Article Citation:

Hughes, Gwen. "Productivity Report Streamlines Management." *Journal of AHIMA* 71, no. 9 (2000): 87-90.

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