

# Roles for HIM Professionals in HIOs

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Simply stated the goal of health information exchange (HIE) is very clear-cut and easy to understand—establish networks that connect healthcare providers electronically in order to facilitate higher quality healthcare.

However, actual implementation of HIE business models and methods are constantly evolving. Adding to the complexity are the many and often conflicting federal, state, local, community, and private initiatives underway to foster and enable interoperable electronic health information exchange. Scant attention has been paid to the professional education, knowledge, and experience necessary to staff health information exchange organizations (HIOs). Realizing this gap in AHIMA's HIM Body of Knowledge, the AHIMA HIE Practice Council decided to identify and interview HIM professionals that had successfully transitioned into the emerging domain of health information exchange. By providing examples of health information management (HIM) professionals who have begun working in HIOs, the practice council hopes others will follow in their footsteps and become HIM expert leaders in the growing and increasingly important field of health information exchange.

## Partnership Formed to Study HIO Roles

Since January 2009 the HIE Practice Council has played a vital role in addressing the impact of HIE on HIM and healthcare professionals who work in HIO environments. The recent 2013 HIE Practice Council aspired to continue this work and provide research that would extend the findings of a 2012 white paper titled, "Trends in Health Information Exchange Organizational Staffing: AHIMA/HIMSS HIE Staffing Model Environmental Scan."

The 2012 white paper was the result of a collaboration between AHIMA and the Healthcare Information and Management Systems Society (HIMSS). The organizations came together to form the joint HIE Staffing Model Environmental Scan Workgroup in order to study and analyze job opportunities and skill sets required in the HIO setting.

The joint AHIMA/HIMSS project approached data collection for this research project through the use of one-on-one interviews with targeted individuals who were responsible for staffing HIOs. The results of the project focused on data exchange and HIE activities, including those exploring opportunities in education, training, and certification to enhance their knowledge and skills in this area.

The joint HIE workgroup recognized the need for additional research beyond the findings of this research study to clarify and refine the education, training, resource talent, and work experience necessary to provide a clear understanding of the professional skill sets and experience required for HIOs.

The joint HIE Staffing Model Environmental Scan Workgroup recommended that future studies should be conducted on the staffing and skill sets needed to support HIOs. The recommendations for future research topics that would benefit the industry included:

- A focus on the evolutionary paths of HIOs over an extended period of time, including trends and shifts in staffing needs as the HIO matures and service offerings are added.
- Identification of any major differences in services and staffing requirements between for-profit and not-for-profit HIOs.
- Identification of key differences between regional, state, and other (i.e., interstate or national) HIOs.
- Identification of the staffing and skills required for service offerings that include both traditional and emerging registries (i.e., cancers, transplants, etc.). These were not specifically identified as areas of growth by the participating HIOs.

Insufficient research exists regarding the professional education, knowledge, and experience necessary to staff HIOs. Identifying this gap in the research, the 2013 AHIMA HIE Practice Council decided to identify the HIM roles and skill sets needed for the HIO environment and to enhance the research started by the joint AHIMA/HIMSS workgroup in 2012.

To do this, the 2013 HIE Practice Council voted to form the Roles for HIM Professionals HIE Workgroup. This workgroup then conducted focused one-on-one interviews with six HIM professionals that had successfully transitioned into the emerging domain of health information exchange.

## **Interviews Used to Find Common HIO Role Themes**

Workgroup volunteers contacted identified HIM professionals working in HIE roles via an introductory e-mail or personal telephone call requesting their participation. Selected volunteer research participants took part in one-on-one telephone interviews. All six participants were administered the same open-ended questions, which are highlighted below along with a summary of the workgroup's findings.

### **Question #1: Work Experience**

*What was your prior work experience before working for the health information exchange? Please list your current job title/role, years on the job, how many employees hold HIM credentials, and their highest level of education.*

From the interviews conducted it was apparent that the HIM roles currently staffed in HIOs and other HIE areas are concentrated within either information technology or privacy areas. The backgrounds of the six interviewees were varied, representing directors of HIM, hospital system implementation analysts, hospital information coordinators, and medical center information system privacy and security officers.

The roles the participants currently hold within their HIE organizations ranged from the catch-all title of health information management professional and director of the office of health information integrity to the very specific role of HIE analyst responsible for developing and implementing interfaces between physician practices and patient portals with corresponding personal health records (PHR). One participant, a CEO of a consultant firm, provided consulting to private, regional, and state HIOs.

Most of the participants had been employed by their HIOs for just one or two years, which is not surprising since most HIOs have only been in existence since state-designated entities HIE were first funded by an Office of the National Coordinator for Health IT (ONC) program in 2010.

### **Question #2: Preparing for the HIE Job Role**

*What about your past experiences prepared you for your HIE job role?*

All interviewees had obtained bachelor's degrees and had credentials in HIM. Two interviewees had a master's of science degree. They felt their experience with data governance, privacy and security, and release of information (ROI), along with HIM administration experience, prepared them for their HIO roles. The skill sets they most often relied upon included leadership and organization skills, patient identity management, master patient index (MPI) management, and correction of medical record information. Knowledge of HIPAA was also a significant benefit, the interviewees said.

### **Question #3: Securing an HIE Job**

*How did you secure your job in the HIE domain?*

The majority of the study participants were recruited for their HIO position through recommendations or word of mouth. They were all hired in their HIO roles due to their HIM credentials and background. For example, Sonia I. Flores, whose title is HIM professional in her current position with the Puerto Rico HIE, noted that her previous position was privacy and security officer for a medical center. Flores shared that the local HIO contacted her, seeking her privacy and security skills.

Pamela Lane, MS, RHIA, CPHIMS, deputy secretary of health information exchange at the California Health and Human Services Agency (HHS), Office of Health Information Integrity, was another participant in the study and secured her role by personal referral. “A previous CIO (a physician) was a visionary and recommended me for this position and appreciated the HIM profession, and saw how the state could use an HIM professional in leadership,” Lane says.

Based upon the interview responses, it is a trend for HIOs to seek out candidates with a HIM background. This is a positive outlook for HIM professionals looking for opportunities in an HIO role. The survey findings give credence to the expertise of credentialed HIM professionals.

#### **Question #4: Apply HIM Skills in the HIO Domain**

*How do you apply your HIM skill set to your current position?*

The HIM professionals working in an HIE capacity are all applying the traditional HIM skill set in their current roles, according to the study. As the deputy secretary of HIE for California’s HHS, Lane said she has leaned on her HIM experience to lead the collaboration efforts between state agencies in order to establish data use and sharing principles.

Margaret Strader, RHIA, health information exchange analyst at Hardin Memorial Hospital in Elizabethtown, KY, said during the study interview that her work in HIE isn’t all that different from other HIM work. “Many of the processes are the same, but are used in a different format or venue,” Strader says.

Mastery in core HIM principles as well as general leadership and organizational skills are critical in HIE roles. HIM professionals are accustomed to leading the collaboration between disciplines. Katherine Sutton, RHIT, CCS, clinical informatics manager at Health Language, Inc., stressed during the interview that in her current role at an HIO it helps to be a “jack of all trades.” Sutton was quick to point out “the more we know about the health information exchange operations, the more successful we can be in delivering information to our clients and helping them with any issues that might come up.”

#### **Question #5: Learning New Skills for the HIE World**

*What new job roles or functions did you have to learn for your new HIE role?*

Those interviewed largely expressed a need to hone their data management skills. They shared that standardization of terminology and data definitions are paramount to multiple providers working with various EHR systems, and are essential to providing consistent and reliable information across multiple care settings for continuity of care. These skills will be critical when the HIO begins to aggregate data for analytics and create a data governance structure.

Additionally, knowledge of project management methodologies and project management skills are particularly important to the execution of the HIE initiatives. One individual interviewed also expressed the need to learn to speak the language of IT. The ability to understand terms such as “HL7 messages: Order Result and Patient Identification, respectively” allowed the respondent to work side-by-side with—and even have greater respect for—her IT colleagues. Another interviewee noted that learning how to gather IT system and network requirements, and having a good understanding of workflows as well as technical transport protocols and integration engines, has helped her succeed in her role providing consulting services to private, regional, and state exchanges.

#### **Question #6: Opportunities for HIM Professionals in HIE**

*What type of opportunities do you see for HIM professionals as HIOs develop?*

Interviewees encouraged HIM professionals to look at opportunities beyond the traditional HIM jobs in a formal HIM department. Health IT, HIE and the “meaningful use” EHR Incentive Program have opened many doors for HIM professionals who are interested in moving the profession forward into new places. Several of those interviewed for the study expressed that the healthcare industry is in the early stages of developing HIE and HIOs, and now is the time to embrace these opportunities.

Cynthia Hilterbrand, MBA, RHIA, director of technology and operations for Yeaman and Associates, shared that her current position as HIE Network Coordinator for the Greater Oklahoma City Hospital Council began as a web portal coordinator role.

Roles like data integrity specialist and HIE coordinator as well as roles in privacy, security, and transport protocols like DIRECT are emerging in the HIE domain. As in the traditional HIM department, roles in data and master data management and analytics are beginning to be recognized as a necessity for HIOs.

Stacie Durkin, RN, RHIA, CEO of Durkin and Associates, suggested that landing a role in an HIO or working with HIE in some capacity can offer upward career mobility. “There is room for advancement working with HIOs,” Durkin says. “The most difficult aspect is securing a seat at the table. This, many times, requires volunteering your time.”

### **Question #7: Preparing for the Unexpected**

*What was your biggest surprise after taking on the HIE job role?*

The study participants had a variety of experiences to share when asked about their biggest surprise after taking on an HIE job role. One individual noted she was surprised that she was the lone HIM representative at the HIO. Others noted surprise that the implementation of “something” when it comes to health IT seems to have taken priority over creating a strategy for what will be needed in the future.

The amount of work to be done and the tendency to work in silos was noted as unexpected by study participants, as was the pressure to implement solutions in a short time frame regardless of the challenges of interoperability and data sharing. In addition, respondents relayed seeing the need for increased access to data, but parties were not always willing to share their data when asked due to fear of competition.

One individual said they were surprised by the different ways that generated data is used by payers and providers and witnessed the importance of understanding why the requested information is needed for operations. Another individual expressed surprise at not having to sell the value of moving data—everyone they encountered agreed this functionality has to happen.

Another insight from respondents, though not that surprising, is that everyone on the HIO staff understood that the value of the health information exchange depends upon the quality and interoperability of data. Everyone realized that they could potentially be the patient or family member depending upon the accuracy and timeliness of health information. As a result there was widespread support for the organization’s mission and vision. This commitment and sense of urgency translated into a willingness to be innovative and try new things at the HIO, respondents said. Leadership at one HIO capitalized on their staff’s eagerness and “can do” spirit by stressing that “Imagination plus innovation equals realization.”

### **HIE Roles Offer Bright Future**

These focused interviews represent a sampling of HIM professionals who have successfully made the transition to roles in the HIE area. The results confirm that a strong HIM knowledge base is critical to support this important national initiative to connect the information ties of disparate health systems.

The current roles of the interviewees highlighted the need in HIOs for those experienced in privacy, operations, and technology implementation. The core foundation HIM experience brings to HIE includes data governance, privacy and security, and release of information skills, as well as skill sets centering on leadership, organization, patient identity management, and knowledge of master patient index oversight and maintenance.

Networking and word-of-mouth was found to be the key factor in how the majority of respondents learned about the HIE and HIO opportunities, and the trends show that the HIM background and skills were sought out as part of HIE-area recruiting efforts.

Data management and analytics skills were at the top of the recommended list for HIM professionals to maintain and enhance if they were interested in moving into an HIE-based role. Interviewees voiced the importance of standardized terminologies

and data definition consistency throughout multiple care settings, with various EHR systems, for the care continuum. Project management skills and methods were also noted to be a very important part of making the transition to HIE roles.

Surprises from interviewees included the amount of work left to be performed in the HIE space and the pressure to implement systems overriding the need for creating a long term strategy. General consensus revealed that HIE opportunities will be on the rise in the coming years, and that HIM professionals are well-suited for these career opportunities.

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