

Scanning the HIM Environment: AHIMA's 2015 Report Offers Insight on Emerging Industry Trends and Challenges

Save to myBoK

By Anna Desai, MHA, CAE

Today's healthcare environment is driven by various economic and regulatory forces and technological advancements that bring both opportunities and challenges. Healthcare organizations need the right information at the right time to make accurate decisions regarding patient care and to optimize business processes. Yet the role of information and the way an organization's leaders, frontline staff, patients, and consumers are interacting with that information is rapidly changing.

Organizations with a focus on the future develop planning processes that take into account the trends, issues, and dynamics that ultimately drive, influence, and shape the strategy and goals of their business. This is called an environmental scan.

Successful environmental scanning requires continuous monitoring and acquiring of information that helps organizational leaders identify and interpret potential trends and priorities. Understanding the key forces and trends serves as a foundation for what is needed to shape strategy. Environmental scanning is an essential component to the vitality and success of leading an organization to a rapidly changing future.

The AHIMA House of Delegates (HoD), a deliberative assembly comprised of delegates from each of the 52 Component State Associations (CSA), and the AHIMA Board of Directors have been actively involved with environmental scanning for the health information management (HIM) profession over the last several years. Members of the Envisioning Collaborative, a subgroup under the HoD comprised of delegates and subject matter experts, are responsible for conducting scanning activities and leading the development of the environmental scan report. The report offers an analysis of HIM issues and trends impacting and influencing the profession and healthcare.

What AHIMA Saw Through the Telescope

The first step of scanning the environment is thorough input and research, discussing the opportunities and potential threats facing the healthcare and HIM professions.

The environmental scan report aims to:

- Identify technological, business/economy, demographic/workforce, legislation/regulatory issues, trends, and events important to AHIMA and its members
- Spot potential opportunities or threats implied by issues, trends, and/or events
- Promote a futuristic orientation for AHIMA activities, including product and service development
- Inform public policy, government relations, and advocacy plans and priorities

Earlier this year, the environmental scan report was utilized during the AHIMA Board of Directors' annual review of AHIMA's strategic planning session. The AHIMA HoD also utilizes this report to help frame forum topics, team agendas, and HoD discussion that can, according to Laura Pait, RHIA, CDIP, CCS, 2015 Speaker of the House and Co-Chair of the Envisioning Collaborative, "create strategic direction required to govern the profession on the opportunities and threats that are forecasted to impact our members." The following provides some highlights from the current Environmental Scan report.

Technology Reinventing Healthcare Delivery System

The healthcare delivery system is being reinvented, in part by the ability to transform data into actions that are customized for consumers. Technology is making it easier and more enjoyable for people to become active participants in their health,

providing the ability to access information at their fingertips and for providers to create a more seamless healthcare experience. According to a trend report from PricewaterhouseCoopers (PwC), social, mobile, analytics, and cloud technologies are the underpinnings of new business models in which health organizations will be paid based on value rather than volume.¹

Cloud Services Growing in Popularity for Health Data

There are a growing number of healthcare organizations who have started to use cloud services to host applications and data using a “software as a service” (SaaS) model. A recent survey by the Healthcare Information and Management Systems Society (HIMSS) found that 83 percent of IT departments housed within healthcare organizations, such as medical practices, hospitals, and corporate offices of healthcare systems, are currently using cloud services, and 9.3 percent plan to in the near future.²

While in aggregate, a large majority of healthcare providers now and in the future see the value of cloud services.³ Still, healthcare organizations remain in the early stages of determining how cloud services fit into the HIM and technology ecosystem. SearchHealthIT conducted a study of healthcare organizations and found only 21 percent of respondents said they use cloud functions for business intelligence and clinical data analytics.⁴ Organizations will need to understand and calculate how to balance the possible benefits of cloud computing in healthcare with security, technical, and legal risks.

Big Data can Save Big Dollars

An analysis published by McKinsey and Company explains that Big Data could help US citizens save as much as \$450 billion in healthcare costs, but fundamental change is necessary to meet such goals.⁵ Big Data will likely increase opportunities for HIM professionals and create new and emerging roles such as data governance analyst, data mapping specialist, and clinical informatics reporting analyst.⁶ However, as healthcare organizations seek to capitalize on Big Data, they face significant information technology challenges, ranging from the basic need for an electronic health record (EHR) to the intensive process of combining data from multiple systems.

Security Breaches Likely to Increase

An estimated 80 percent of medical data is unstructured and is clinically relevant.⁷ This data resides in multiple places such as individual EHRs, lab and imaging systems, physician notes, medical correspondence, claims, and finance. Data interoperability and securing data across EHR systems remains a challenge. By 2020, nearly half (42 percent) of digital healthcare data will be unprotected, but needs to be as more providers and stakeholders depend on bigger and robust data sets for decision making.⁸ It is estimated that by the end of 2015, half of healthcare organizations will have experienced between one and five cyber attacks in the previous 12 months—with a third of those attacks successful. This will necessitate investments and resources in a strategy to avoid disruptions to business operations and to prevent incurring fines and notification costs.⁹

mHealth Revolutionizing HIM Practice

Social media and mobile devices like smartphones and tablets (with downloadable apps) will continue to revolutionize the field and practice of HIM. As of December 2014, there were more than 100,000 mobile health (mHealth) apps dedicated to healthcare, which has doubled over the last two years.¹⁰ Research2Guidance predicts that 1.7 billion people will have downloaded a health app by 2017, generating \$26 billion in revenue.¹¹ More opportunities to communicate using a variety of different methods and tools will help consumers seek advice and gain knowledge. The apps may allow for greater control in health management, from tracking exercise to scheduling doctor appointments.¹² For physicians and other care providers, apps can assist in day-to-day medical care, as well as allow for health-related tasks in remote areas without access to traditional healthcare infrastructure. The use of mHealth will have a significant impact on the healthcare industry and how healthcare is going to be delivered.

Consumers Gaining Control of Their Record

Consumers today increasingly want control of both the financial side (health insurance, health accounts) and wellness side (fitness trackers, health management apps) of their own healthcare. A report by the National Partnership for Women and Families shows that consumers want even more robust online access functionality and features than are available today, including the ability to e-mail providers (56 percent); review treatment plans (56 percent); see doctors' notes (58 percent) and test results (75 percent); schedule appointments (64 percent); and submit medication refill requests (59 percent).¹³ Patient trust in the privacy and security of EHRs has increased since 2011, and patients with online access to their health information have a much higher level of trust in their doctor and medical staff (77 percent) than those with EHRs that don't include online access.

Tight Budgets, Change Leading Leaders to Business Strategy

There have been a multitude of changes in the healthcare landscape over the past few years. These changes have put pressure on and presented challenges to healthcare organizations and their leaders. Strategic plans are top priority as healthcare leaders prepare for what's ahead. The combined effects of the Affordable Care Act's (ACA's) coverage expansions, improved economic growth, and an aging population are expected to fuel health spending growth for the next several years.¹⁴

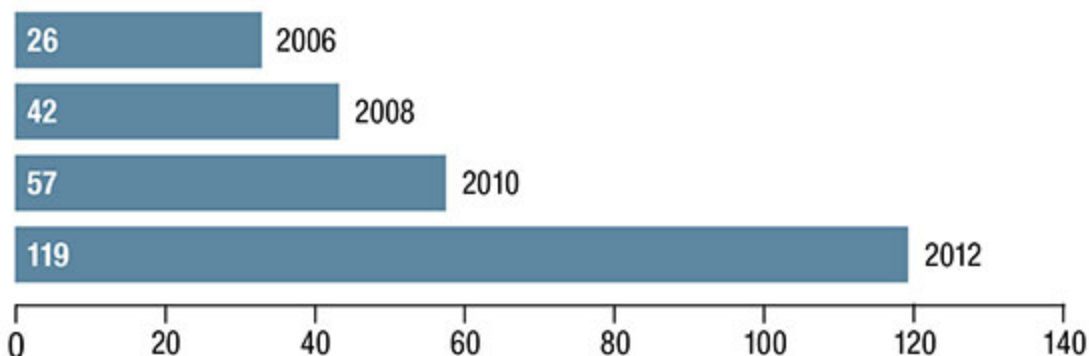
Healthcare Costs Will Outpace Inflation

A report from PricewaterhouseCoopers's Health Research Institute has forecasted a modest 6.8 percent increase in healthcare spending in 2015.¹⁵ A report from the Centers for Medicare and Medicaid Services' (CMS) Office of the Actuary also forecasts that the average growth rate for 2015-2023 would be six percent. That is up slightly from 2014.¹⁶ These findings also suggest that healthcare will outpace growth in the gross domestic product (GDP) over the next decade. Healthcare's share of the GDP, which has remained stable since 2009, will increase from 17 percent in 2012 to more than 19 percent in 2023.¹⁷

Health Information Exchange Use Growing

Thirty percent of hospitals and 10 percent of ambulatory practices participated in one of 119 operational health information exchange (HIE) efforts.¹⁸ That is more than double the early 2010 participation rate. Also, the number of fully operational HIEs has more than doubled from 2010 to 2012, showing that the organizations are gaining a foothold in the healthcare market (see Figure 1 on below).

Figure 1: Number of Fully Operational Health Information Exchange Initiatives

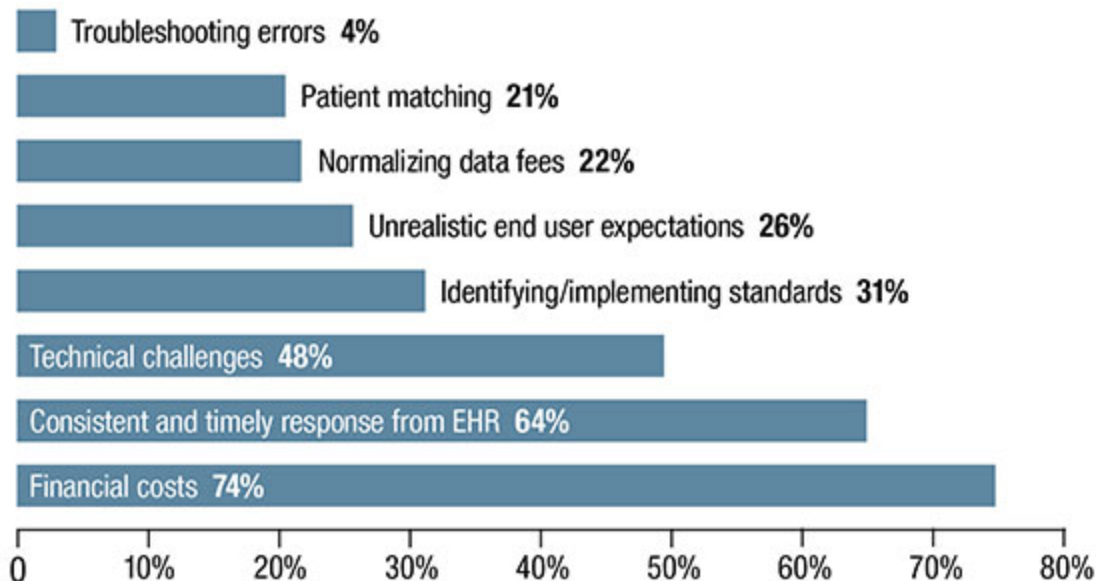


Sources: eHealth Initiative. "The State of Health Information Exchange in 2010: Connecting the Nation to Achieve Meaningful Use." 2010. <http://ihealthtran.com/pdf/eHI%20-%20HIE%20Final%20Report.pdf>; "Operational Health Information Exchanges Show Substantial Growth, But Long-Term Funding Remains a Concern." Health Affairs 32, no. 8 (August 2013): 1486-1492. <http://content.healthaffairs.org/content/32/8/1486.full?keytype=ref&siteid=healthaff&ijkey=dEAYexYtxoPP>.

Challenges to Interoperability Remain

While there has been substantial progress, 74 percent of HIE efforts identified “developing a sustainable business model” as a barrier to success.¹⁹ HIE projects can vary widely, but all share similar implementation challenges. The Agency for Healthcare Research and Quality (AHRQ) cites funding, staffing, governance, achieving buy-in, technical issues, reporting, and policy as the most common issues found among HIE initiatives.²⁰ According to a 2014 eHealth Initiative survey on Health Data Exchange, cost and technical challenges were indicated as the key barriers to interoperability (see Figure 2 below).

Figure 2: Challenges Related to Achieving Health IT Interoperability



Source: eHealth Initiative. “2014 Results from Survey on Health Data Exchange.” October 8, 2014.

<http://assets.fiercemarkets.com/public/healthit/ehidataexchange2014.pdf>.

Shifting Workforce Demographics Indicate Coming Shortage of HIM Professionals

The roles of HIM are rapidly changing and will require individuals to expand their scope of work and learn new skills in order to adapt and lead. Settings and sites of care are also evolving. Here are some key findings of how the supply of HIM professionals could evolve in the coming years and how this compares to expected demand for HIM in different settings.

Millennials

In 2015, millennials are set to become the largest percentage of the workforce for the first time.²¹ Millennials will play a pivotal role in changing the culture of traditional employment. The top three choices millennials view as most important regarding career choices are:

1. Work/life balance
2. Health benefits
3. Compensation

A generation that is vocal about their demand for a better work/life balance have and will continue to place a higher value on a flexible and mobile work environment. Many companies are investing in virtual project management tools that aim to streamline the logistics of managing virtual teams.

Baby Boomers

The baby boomer retirement wave will continue to have a significant effect on organizational workloads. Also the aging workforce will continue to have an impact on supply and demand for HIM professionals. It is projected that 6,000 HIM professionals will be needed each year to fill new positions and replace vacant positions. However, only approximately 2,000 new graduates enter the HIM field each year.²² There will be twice as many jobs created by retirements than new jobs; however, the profession has been slow to replace and prepare younger members to fill their vacant spots. On average, health informatics positions stay open for 35 days—two days longer than the national average posting duration of 33 days.²³ In addition, new and emerging health positions stay open twice as long as replacement postings. For example, a posting for a medical records clerk will stay open for 18 days on average, compared to 38 days for its newer successor, clinical analyst.²⁴

HIM Roles Evolving

HIM professionals hold a number of diverse roles and responsibilities such as revenue cycle management, database coordination, EHR management and user support, quality management, patient safety compliance, HIE staffers, and other functions where specialized data and information skills are needed. It is estimated that 50,000 health informatics workers will be needed in the next five to seven years due to an increase in the adoption and complexity of EHR systems.²⁵

The market will likely emphasize coding skills (clinical documentation improvement (CDI), revenue cycle, and registry); data governance skills (data integrity, analytics, fraud and abuse, privacy and security); information governance skills (e-discovery, enterprise information management, meaningful use, regulatory requirements, and data standards); and leadership skills (chief knowledge officer, chief learning officer).²⁶ These expanded roles will require further education and analytical and critical thinking skills, and more clinical knowledge in order to compete in tomorrow's job market.

Legislation and Regulation Continue to Change HIM

Shifts in the US healthcare delivery system, including a convergence of laws, rules, and regulations, are driving change in information management practices. For example, new models of care promoted by legislation offer opportunities for AHIMA and its members. This will be a revelatory year for the health sector as the industry begins to understand the population of newly insured individuals granted access through ACA, their health status, and consumer preferences. At a time where there is a shortage in primary care physicians (PCPs),²⁷ the ACA focuses on PCPs, placing greater emphasis on their role in improving the health of Americans and lowering overall healthcare costs.

ACA has required shifts and updated practices in the use and management of health information. The ACA required work is likely to improve efficiency and value in healthcare, but the HIM framework must be reconfigured to provide optimal support for the essential features of accountable care, including close coordination of care, quality measurement, and patient-centeredness.²⁸

HIM strategies will need to address:²⁹

- Greater integration of healthcare information across the continuum of care
- Processes and systems that promote understanding and use of health information by patients and families
- Reframing the way coded data and information is used to obtain payment in a system that rewards quality and efficiency of services over the traditional emphasis on the quantity of services

Agency Collaboration at an All-time High

Efforts from various agencies such as CMS, the Office of the National Coordinator for Health IT (ONC), National Quality Forum (NQF), and AHRQ are converging and overlapping one another with an aim to provide better quality healthcare for Americans. Issues include patient safety, better, wider access to care, quality measures, and cost reduction. Health IT and EHRs are tools to achieve these goals and HIM professionals are right in the middle. Many of these federal agencies are working together to become more coordinated than in the past.

Now You Know, But What's Next?

A number of forces will continue to play a key role in our changing healthcare system. Environmental scanning offers an objective review of the current and anticipated factors that can impact and inform the needs of today and tomorrow. The intent is to begin discussion, build on these trends/issues, and determine how HIM professionals can actively influence their environment and thereby create and actively manage their future.

Judi Hofman, CHPS, BCRT, CAP, CHSS, H-CHP, co-chair of the Envisioning Collaborative, says the scan is just the beginning of the work that needs to be done. "The work that is driven by the Environmental Scan is reliant upon our members and their subject matter expertise and engagement. This Environmental Scan must be used to impact how HIM influences and drives innovations now, with a keen eye on the future of HIM," she says. "CSA members and their HoD delegate representatives must be involved to continue building towards the success of our HIM future through this rapidly changing time."

Read More

Read the Full 2015 Environment Scan Report <http://engage.ahima.org>

To access the 2015 Environmental Scan report, visit the Engage topic "Environmental Scan Reports."

Notes

[1] PricewaterhouseCoopers Health Research Institute. "Top Health Industry Issues of 2014: A New Health Economy Takes Shape." December 2013. www.pwc.com/en_US/us/health-industries/assets/pwc-top-health-industry-issues-of-2014.pdf.

[2] HIMSS Analytics. "2014 HIMSS Analytics Cloud Survey." June 2014. <http://apps.himss.org/content/files/HIMSSAnalytics2014CloudSurvey.pdf>.

[3] Ibid.

[4] TechTarget. "Analytics: Moving health care forward." SearchHealthIT.com. www.techtarget.com/downloads/Health_IT_BI_report.pdf.

[5] Groves, Peter et al. "The 'Big Data' Revolution in Healthcare: Accelerating Value and Innovation." Center for US Health System Reform Business Technology Office. January 2013.

[6] Eramo, Lisa A. "Healthcare's Data Revolution: How Data is Changing the Industry and Reshaping HIM's Roles." *Journal of AHIMA* 84, no. 9 (Sept 2013): 26-32.

[7] IBM. "Big Data at the Speed of Business." www-01.ibm.com/software/data/bigdata/industry-healthcare.html.

[8] Miliard, Mike. "Top Ten Health IT Predictions for 2015." *Healthcare IT News*. November 26, 2014. www.healthcareitnews.com/news/top-10-health-it-predictions-2015.

[9] Ibid.

[10] "mHealth App Developer Economics 2014: The State of the Art of mHealth App Publishing." research2guidance mHealth App Developer Economics survey. May 2014.

[11] Research2Guidance. "Mobile Health Market Report 2013-2017: The Commercialization of mHealth Applications (Vol. 3)." March 4, 2013. www.research2guidance.com/shop/index.php/downloadable/download/sample/sample_id/262/.

[12] "mHealth and FDA Guidance." *Health Affairs* 32, no. 12 (December 2013).

[13] National Partnership for Women and Families. "Engaging Patients and Families: How Consumers Value and Use Health IT." December 2014. <http://hitconsultant.net/wp-content/uploads/2014/12/engaging-patients-and-families.pdf>.

- [14] Sisko, Andrea et al. "National Health Expenditure Projections, 2013-23: Faster Growth Expected with Expanded Coverage and Improving Economy." *Health Affairs* 33, no. 10 (September 2014).
<http://content.healthaffairs.org/content/early/2014/08/27/hlthaff.2014.0560>.
- [15] PricewaterhouseCoopers Health Research Institute. "Medical cost trend: Behind the numbers 2015." June 2014.
www.pwc.com/en_US/us/health-industries/behind-the-numbers/assets/hri-behind-the-numbers-2014-chart-pack.pdf.
- [16] Sisko, Andrea et al. "National Health Expenditure Projection, 2013-23: Faster Growth Expected with Expanded Coverage and Improving Economy."
- [17] Ibid.
- [18] Milstein, Julia Adler et al. "Operational Health Information Exchanges Show Substantial Growth, But Long-Term Funding Remains a Concern." *Health Affairs* 32, no. 8 (August 2013): 1486-1492.
- [19] Ibid.
- [20] Agency for Healthcare Research and Quality. "Emerging Lessons: Health Information Exchange."
<http://healthit.ahrq.gov/ahrq-funded-projects/emerging-lessons/health-information-exchange>.
- [21] PricewaterhouseCoopers Health Research Institute. "Medical cost trend: Behind the numbers 2015."
- [22] AHIMA. "[Embracing the Future: New Times, New Opportunities for Health Information Managers. Summary Findings from the HIM Workforce Study](#)." 2005.
- [23] Burning Glass Technologies. "Missed Opportunities? The Labor Market in Health Informatics, 2014." December 10, 2014.
www.burning-glass.com/research/health-informatics-2014/.
- [24] Ibid.
- [25] University of Illinois at Chicago. "Health Informatics." <http://healthinformatics.uic.edu/intersection-of-healthcare-it/>.
- [26] AHIMA Foundation. "Reality 2016: The Council for Excellence in Education's Recommendation for HIM Education." September 26, 2012. www.ecu.edu/cs-dhs/hsim/upload/Reality_2016_Presentation-9_26_12_NC.pdf.
- [27] Health Resources and Services Administration Bureau of Health Professions. "Projecting the Supply and Demand for Primary Care Practitioners Through 2020." National Center for Health Workforce Analysis. November 2013.
<http://bhpr.hrsa.gov/healthworkforce/supplydemand/usworkforce/primarycare/projectingprimarycare.pdf>.
- [28] Viola, Allison and Lydia Washington. "Accountable Care: Implications for Managing Health Information." AHIMA Thought Leadership Series. 2011.
- [29] Ibid.

Anna Desai (anna.desai@ahima.org) is manager of profession governance at AHIMA.

Article citation:

Desai, Anna. "Scanning the HIM Environment: AHIMA's 2015 Report Offers Insight on Emerging Industry Trends and Challenges" *Journal of AHIMA* 86, no.5 (May 2015): 38-43.
