

# Strategic Importance of Electronic Health Records Management

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More than ever, the healthcare industry is making significant progress in the quest for electronic health records (EHRs), which will improve the quality and safety of patient care and achieve real efficiencies in the healthcare delivery system. Emphasis has been placed on intelligent systems that support the care process and clinical decisions as well as the creation of health information for patient care.

From a strategic standpoint, it is important to go beyond the information creation phase and develop a plan that results in an EHR and EHR system that maintain a high level of integrity for business and legal purposes. The management of the EHR and the EHR system is and will continue to be a mission-critical function in the provision of care across the healthcare continuum. However, in today's urgency to begin deploying EHRs, healthcare entities, vendors, and others sometimes neglect to build in the processes and system capabilities needed to enable optimal EHR management functions and ensure the electronic rather than the paper version can stand as the legal business record.

Traditional business and health records management concepts and processes must be evaluated and applied in this relatively new world of EHRs. Business process redesign and an understanding of the change management process are fundamental to this activity. Healthcare organizations need to analyze and assess all downstream uses of EHRs and see those uses reflected in requests for proposals, system selection, development, installation, and implementation in order to ensure that all needs of the organization are met.

## Definition of Electronic Health Records Management

Electronic health records management (EHRM) is the process by which electronic (e.g., digital) health records are created or received and preserved for evidentiary (e.g., legal or business) purposes.

An electronic record includes information that is:

- Recorded on any electronic medium (e.g., magnetic medium)
- Intended to provide documentation for long-term retention that has legal or business evidentiary value
- Potentially produced in response to a subpoena duces tecum

EHRM requires decision making and planning throughout the entire life cycle of the EHR—from planning, processing, distribution, maintenance, storage, and retrieval of the health record to its ultimate disposition, including archiving or destruction. Decision making includes, but is not limited to, what EHRs to keep and for how long, the assignments of authorities and responsibilities, the design and administration of the process, and the audit and review of the process's performance. In the early phases of EHRM system development, it is important to make critical decisions about the role and use of paper and film to avoid the dilemma of maintaining dual systems.

## Roles and Responsibilities

HIM ensures the availability of clinical, demographic, financial, and administrative data to facilitate real-time healthcare delivery and critical health- and business-related decision making for multiple purposes across diverse organizations, settings, and disciplines. HIM professionals are ideally suited to provide the healthcare entity with the necessary leadership to ensure that the EHR and the EHR system are optimally managed.

As the traditional custodian of the paper medical record and medical record system, HIM professionals are trained to ensure the quality, privacy, and integrity of the EHR. Today, the EHR can and often does reside in several different information systems. HIM professionals ensure that information management standards are consistently applied across these various systems in order to maintain the level of integrity necessary for the healthcare organization's records.

The evolution from a paper-based medical record model to an EHR model has opened up many avenues for HIM experts to apply and share their core competencies, knowledge, and skills. Advanced technologies and systems make it possible for HIM practitioners to fulfill roles such as patient advocate, data translator, and public health officer.

The e-health environment encompasses much more than the storage and retrieval of information. It places new demands on the HIM professional to assist the consumer in healthcare across the continuum of care. As a patient advocate, HIM practitioners have a vital role and responsibility in the use of patient portals for e-mail, personal health records, scheduling healthcare appointments, completing patient health questionnaires and surveys, and transferring electronic clinical information. HIM practitioners play a role in working toward the exchange of healthcare data among providers, healthcare professionals, and patients. Other traditional patient advocate responsibilities, such as protecting patient privacy, maintaining confidentiality, and promoting and enhancing public policy, will continue to be a critical HIM responsibility.

HIM professionals have long been translators of clinical data for their business and financial offices through their clinical expertise, understanding of documentation, and coding functions. Now is the time for HIM practitioners to share their knowledge with healthcare consumers in the role of data translator. The shift to a consumer-centric model requires HIM practitioners to educate and assist consumers in accessing secure patient information and translating medical terminology across the continuum of care and in advanced technologies.

The e-health environment is, therefore, increasing the ability of HIM professionals to manage data and assist in the development of decision support systems for individual, aggregate, and public health data. HIM practitioners have a tremendous responsibility in providing the support for organizational, local, and national systems that ensure quality, integrity, and availability of healthcare data. The role of the public health officer in providing strategic leadership of health information in the public health sector has been gaining importance such that we may, in fact, say that these activities are already underway and can be fully supported by the EHR.

The EHR and EHRM are expanding the roles and responsibilities of HIM practitioners. Legal, regulatory, and accrediting environments will need to adapt to the emergence of new technologies and applications in healthcare, and so the traditional leadership role of HIM will continue to influence and adapt the management of health information.

## **[Checklist for Transition to the EHR](#)**

### **Additional Material**

While this practice brief provides an overview of the importance of strategic electronic document management, much supporting information is necessary to make a successful transition to the EHR. These considerations are included in the online appendix to this practice brief.

## **[Appendix A: Issues in Electronic Health Records Management](#)**

### **References**

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