# Visioning e-HIM: A Process for Imagining--and Anticipating--HIM's Future

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*In times like these, every HIM department needs a plan. Visioning techniques help managers picture the future and draw a road map to e-HIM.*

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The transformation from paper-based health records to electronic health records (EHRs) is ushering in the age of the virtual HIM department. Every HIM function that supports the paper record today will be re-engineered; some will be eliminated. Every HIM fundamental will require rethinking. Within individual organizations, HIM professionals and their executive leadership must envision the virtual HIM department and map the way there if the transition is to be successful.

Envisioning the future of e-HIM$^{TM}$ can be a daunting task. A formal set of exercises helps the process by facilitating discussion. A good visioning approach helps staff think about the future of HIM practice and readies them for the most significant transition in HIM history.

Visioning does not have to be complex. It should be an interactive process that combines readings and exercises. It is helpful for the facilitator to understand the principles of change management and transition management and to be current on the EHR and its impact on HIM practice. A suggested visioning process is outlined below.

1. **Secure a Senior Manager as a Change Sponsor for the Transition from HIM to e-HIM**

   The sponsor will play a key role in helping to create urgency for change and in providing senior management presence throughout the change. The sponsor should also serve as a sounding board and provide needed support during the transition.

2. **Initiate the Visioning Exercises with HIM Managers and Supervisors**

   Once a sponsor is secured, begin visioning exercises with the HIM management team. When managers gain a sense of urgency about the future and have a better idea of what it might look like, it will be time to begin working with the HIM staff (step 4).

   It is important to get HIM managers and supervisors on board. Change efforts will unravel if the change sponsor and the management team fail to move in the same direction.

   Visioning exercises should begin with reading assignments, networking, and subsequent discussions. Assignments should include one or more readings from each category below. Selected readings should be based on the audience and the types of readings that evoke a response. Networking opportunities exist online and at national, state, and local meetings of professional associations. Readings provide a foundation for visioning discussions, and they ensure that the management team is familiar with the latest HIM standards. Discussions should be scheduled in the same manner you would schedule any meeting. In some instances, particularly when participants have been asked to read a book, it can be helpful for the facilitator to provide a brief PowerPoint presentation on the highlights of the book. This helps frame the discussion and focus on key messages. A sample agenda for a step-2 team meeting is shown below.

   **Articles and Presentations**

Amatayakul, Margaret, and Steven Lazarus. "Planning to Manage Information without Records." Presentation at AHIMA 2004 National Convention. Available online at www.ahima.org.

Fox, Leslie Ann. "Fitting in, Standing Out: Leading Effectively within Your Organization." *Journal of AHIMA* 76, no. 1 (2005): 24–28.

### Transition and Change Management Books

Lundin, Stephen C., Harry Paul, and John Christensen. Fish! *A Remarkable Way to Boost Morale and Improve Results.* Hyperion, 2000. (And other Fish! books by the same authors.)

Johnson, Spencer. *Who Moved My Cheese? An Amazing Way to Deal with Change in Your Work and in Your Life.* Penguin Putnam, 1998.

Carnegie, Dale. *How to Stop Worrying and Start Living.* Pocket, 1990 (revised edition).

Bridges, William. *Managing Transitions: Making the Most of Change.* Perseus, 2003.

Kotter, John, and Dan S. Cohen. *The Heart of Change: Real-Life Stories of How People Change Their Organizations.* Harvard Business School Press, 2002.

### E-HIM Practice Guidelines

These standards can be found in AHIMA's HIM Body of Knowledge[TM]
"HIM Practice Transformation"
"Delving into Computer-assisted Coding"
"The Strategic Importance of Electronic Health Records Management
"Core Data Sets"
"The Complete Medical Record in a Hybrid EHR Environment"
"Implementing E-Signatures"
"E-mail as a Provider-Patient Electronic Communication Medium and Its Impact on the Electronic Health Record"
"Electronic Document Management as a Component of the Electronic Health Record"
"Core Data Sets for the Physician Practice Electronic Health Record"
"Speech Recognition in the Electronic Health Record"

### Networking Opportunities

AHIMA's Communities of Practice

National meetings such as the AHIMA National Convention and those of the Healthcare Information and Management Systems Society

State and local HIM organizations

State hospital associations and similar organizations based on work settings

Seminars such as AHIMA's "Renaissance for the 21st Century: Leading the Change to e-HIM"

3. **Create Pictures of the Future**

Continuing with the management team, sketch out a picture of future practice—a diagram, flowchart, or other visual representation of roles and functions. There are many techniques for this. The most effective are those that require the participants to create the picture themselves rather than providing a picture for them. Whichever technique you choose, it is important to be timely with iterations of the picture.

A sample agenda for a meeting at this stage is shown on the following page.

### Interview

In the interview technique, the facilitator frames the exercise by asking participants to imagine that it is five years in the future and they are being interviewed for an article in the local paper and several HIM magazines. Individually or in groups, partcipants are asked to answer questions such as:

- What is different today about the way you deliver HIM in your organization?
- What bumps did you encounter along the way?
- How did you deal with those bumps?
- How did you help the HIM staff accept the change?
- How did you help physicians accept the change?
- What challenged you as a leader?
- What was the best part of this experience?

### Scenario

In scenario-based exercises, the facilitator asks participants to identify the external factors affecting the healthcare industry and the HIM profession. Imagining that the time is five to 10 years in the future, participants describe what a day in their life looks like as a result of those factors. The facilitator can divide the group into small subgroups or have the entire group answer collectively. Participants write a scenario that describes their work day.

### Mind Mapping

Mind mapping is a pictorial way to record brainstorming and show relationships between ideas. The process enables the group to create a picture from its brainstorming activity. The exercise starts with writing down a central idea and then capturing all the ideas that branch off of it. For example, write the words "virtual HIM department" in a circle in the middle of a sheet of paper (see the example at right; note that it is a sample only—it does not include all HIM activities). Then brainstorm issues related to that future vision and draw spokes radiating out from the center of the circle. As needed, draw circles around the related issues and related spokes. From there, further define each of the spokes and create a work plan, diagram, and other documents that describe the future state.
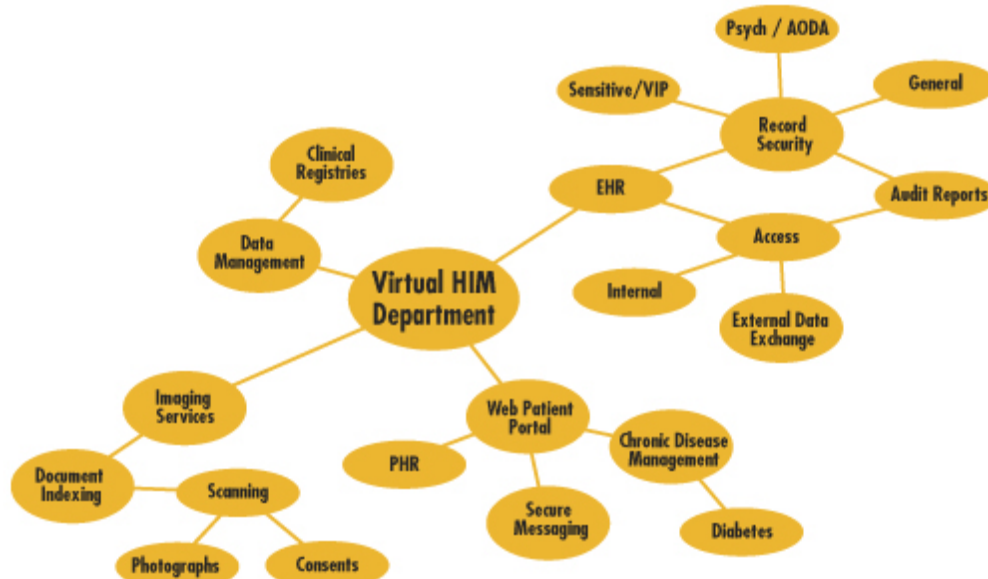
**Site Visits**

Site visits of other HIM departments are a great way to see what the future might look like and are a good complement to readings and visioning exercises. You should include HIM and IS staff who are in critical leadership positions. Visit facilities that are similar or larger in size and that have implemented EHR components comparable to the ones you are interested in. Ask the HIM director and staff how the EHR has changed HIM roles and what lessons they learned as EHR components were rolled out.

4. **Work with HIM Staff**

Once managers have a sense of urgency about the future and a better idea of what it might look like, it is time to begin working with the HIM staff. The techniques used with HIM staff vary and generally start with the HIM leader communicating the changes in healthcare, the organization's plans and timeline for an EHR, and what the EHR means to the organization, patients, and the HIM department. Before meeting with staff, it is a good idea to read a book such as Managing Transitions by William Bridges. Such books provide ideas on how to deal with the emotional aspects of change, how best to talk about it, and how to help people through transition.

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**Agenda**

**County Memorial Hospital**
**HIM Management Team Meeting**

May 12, 2005                                                                 2:00 p.m.
                                                                         Board Room

**Old Business**
Approval of minutes, April 8, 2005

**New Business**       Facilitator: (Name)
Group discussion: HIM transformation and leadership readings

- "HIM Transformation Practice"
- "Fitting in, Standing Out: Leading Effectively within Your Organization"

Practice guideline reading assignments for June 9, 2005, meeting

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- "The Complete Medical Record in a Hybrid EHR Environment"
- "Delving into Computer-assisted Coding"

Introduction to e-HIM resources

- www.ahima.org/infocenter/ehim [web page no longer available]
- AHIMA Communities of Practice

e-HIM Brainstorming Meeting Date—
Mark your Calendars: June 23, 2005

**Standing Items**
Clinical Systems Users Group

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A sample agenda for a meeting during step 2. The group discusses previous reading assignments, receives reading assignments for the next meeting, and is introduced to additional e-HIM resources. If participants were asked to read a book for this meeting, the agenda might include a brief presentation by the facilitator summarizing the book's key points as a way to frame the discussion.

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**Agenda**

**County Memorial Hospital
HIM Management Team Meeting**

June 23, 2005                                                            2:00 p.m.
                                                                        Board Room

**Old Business**
Approval of minutes, June 9, 2005

**New Business**

Review highlights from reading materials                                  (name)

- "The EHR's Impact on HIM Functions"
- Discussion

                                                                         (name)
e-HIM brainstorming session (mind mapping)

- Starting point: virtual HIM department

                                                                         (name)
Wrap-up

**Standing Items**
Joint Commission Preparation
Clinical Systems Users Group
Professional Practice Update

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On the agenda for the meeting during the third step is a review and discussion of reading assignments from the previous meeting. This meeting also includes the brainstorming session, conducted as a mind mapping exercise with the central idea of

"virtual HIM department" as the starting point.

For an executive summary of how the EHR will change HIM practice--and of the resulting HIM department-- see "HIM Practice Transformation." For a more detailed outline of how traditional HIM functions will be transformed, see "The EHR's Impact on HIM Functions."

## Acknowledgments

*Patty Thierry Sheridan* (*pthierry@care-communications.com*) *is president of Care Communications in Chicago, IL;* *Michele D'Ambrosio* *is enterprise application specialist at Shore Memorial Hospital in Somers Point, NJ; and* *Kerry Heinecke* *is software product analyst, information systems, at Marshfield Clinic in Marshfield, WI.*

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