

Case Study

Objectives

- Research best practices for dashboard presentation
- Create a dashboard to monitor key performance indicators
- Prepare a memo explaining the dashboard and implementation plan for the dashboard to present to the chief clinical officer

Instructions

Read the scenario that follows, perform research as indicated and create an HIM dashboard and memo to present to the chief clinical officer.

Scenario

Karen White, RHIA, was recently hired as the new HIM director at a 450-bed suburban teaching hospital. Karen has been in the HIM field for approximately three years. Her past experience includes being the data quality specialist for the HIM coding area at a large teaching facility. She is familiar with the functions of coding and data reporting, but not as familiar with the other functions within the HIM department. Her boss, the chief clinical officer, wants her to create a department dashboard for monitoring key performance indicators within the department. He would like the dashboard sent to him on the first day of each month. The HIM department is comprised of the following functions and staff to support the functions:

- *Coding*: Inpatient, outpatient, emergency department, and physician hospital-based coding
 - *Staff*: 1 coding manager, 1 data quality coder, 15 remote-based coders
- *Electronic Record Management (ERM)*: Document imaging and file retrieval
 - *Staff*: 1 ERM lead, 2 document imaging technicians, 3 file retrieval clerks
- *Record Processing (RP)*: ROI, electronic chart completion, and transcription (all outsourced)
 - *Staff*: 1 RP lead, 2 ROI coordinators, 1 chart analyst, 1 transcription coordinator
- *Administrative Support*: Phone support for ROI and file retrieval, administrative support for director
 - *Staff*: 1 lead support specialist (director support position), 2 support specialists
- *Technical Support*: Maintain hardware and software, computer upgrades, interface issues, workflow errors, perform duplicate master patient index clean up and health record merges
 - *Staff*: 1 application specialist, 2 application analysts

Assumptions

- Each functional area within the HIM department maintains productivity and quality performance data for the activities performed but none of the data is aggregated or shared on a regular basis, and there are no benchmarks in place for the activities.
- The dashboard will be basic: two indicators from each of the five functional areas (coding, ERM, RP, administrative support, technical support), and two indicators for the overall HIM department.
- The hospital does not offer a specific dashboard product.
- Additional research is needed in order to create a dashboard.
- The chief clinical officer requested a draft and implementation plan for the dashboard.
- Actual numbers for each key performance indicator should not be included on the dashboard; it should be a representation of what the dashboard will look like.

Deliverables

Create a user-friendly dashboard including key performance indicators from each functional area and the overall HIM department. Make sure a benchmark is included for each key performance indicator. Create a memo to the chief clinical officer to accompany the dashboard using these parameters:

1. There is no template provided. Part of the assignment requires the student to perform research on effective dashboards and create their own dashboard.
2. The dashboard should be created in Excel.
3. The memo to the chief clinical officer should include at least the following data elements as they relate to implementation: data collection method, communication plan for the managers and leads, and the HIM department timeline.
4. An APA-formatted reference must be provided to support the dashboard research. This should not be part of the memo, but be provided following the memo.

Review Questions

1. One of the first steps in this managerial function is to perform an environmental scan of the internal organization and external industry. This is which managerial function?
 - a. Planning
 - b. Organizing
 - c. Leading
 - d. Controlling
2. Natalie is a lead coder hoping to move into a supervisory position. She is reading articles on how to motivate employees and improve department morale. These topics fall under what managerial function?
 - a. Planning
 - b. Organizing
 - c. Leading
 - d. Controlling
3. Elizabeth prepares a weekly dashboard report with key performance indicators of the HIM department to send to the chief executive officer. Preparation of this report falls under what managerial function?
 - a. Planning
 - b. Organizing
 - c. Leading
 - d. Controlling
4. Delegation is a skill that managers must develop to show employees that they trust them with the authority to perform certain projects on their own. Delegation falls under what managerial function?
 - a. Planning
 - b. Organizing
 - c. Leading
 - d. Controlling