

Final Case Study: Remote HIM Training and Procedure for Evaluation

Amy E. Haisten

Georgia Northwestern Technical College

HIMT 2300: Healthcare Management

Dr. Donna Estes

July 29, 2021

Policy Number: 1.1

Department: Health Information Management

Original Issue Date: 7/29/21

Effective Date: 9/1/21

Revision Dates:

Approval Date: 7/29/21

Subject: Remote HIM Employee Workforce Policy

Purpose: The purpose of this policy is to outline the reasoning for the transition to a primarily remote HIM employee workforce and the need for employee evaluation

Policy: The lack of space at University Hospital causes the need for a reevaluation of how the hospital uses its limited space. Health Information Management is a department that can work remotely and save valuable hospital space that it can then use for other purposes. HIM will train its employees over the next ninety days in preparation for their move to a remote location. Before employees move off-site, the HIM Director will measure current employee performance for all HIM employees to compare their performance after implementation to measure overall success (Knight, 2004). The HIM Director will conduct employee evaluations as outlined in the updated HIM Employee Evaluation Procedure (Kelly, 2020, p. 142, 277-79).

Title of the Procedure: HIM Employee Evaluation

Summary: This employee evaluation procedure outlines the method and frequency for evaluating HIM employees who are primarily remote. The evaluation will measure the quality and quantity of the employee's performance and compare it to previous evaluations. The procedure also describes the result if an employee does not meet performance standards.

Responsible Person: HIM Director

Materials Needed: Employee Job Description (Kelly, 2020, p. 182)
Performance Appraisal Form (Kelly, 2020, p. 182)
Prior Employee Work Sampling and Performance Evaluation Results for comparison (Knight, 2004) (Kelly, 2020, p. 183)

Procedure:

1. The job description outlines the employee's duties and responsibilities. The HIM Director will use the job description as a tool for job performance evaluation which she will measure based on the job description (Kelly, 2020, p. 182).
2. The HIM Director will use the standardized performance appraisal form for the employee evaluation. This form contains the duties and responsibilities included in the employee's job description, and these criteria are the standards for how the HIM Director will measure the employee's performance (Kelly, 2020, p. 182).
3. The HIM Director will create a standardized performance improvement plan for the employee after evaluation. The director will make the plan based on negative employee performance results, and it outlines what and how the employee must improve for the employee to continue employment (Kelly, 2020, p. 182). If an employee does not meet performance standards, the employee will be required to move back into the hospital as a first step (Knight, 2004).

4. The HIM Director will conduct a probationary performance review for new HIM employees. The director will complete this evaluation after ninety days of hire. This first evaluation is an initial assessment of the employee’s overall performance and creates initial goals for employee performance (Kelly, 2020, p. 182).
5. Before transitioning to a remote HIM workforce, the HIM Director will measure current employee performance for all HIM employees to compare their performance after implementation to measure overall success. The director will then conduct evaluations after ninety days and after six months within the first year of implementation and then every six months thereafter (Knight, 2004).

Performance Standards:

University Hospital’s performance standards measure an employee’s performance and state the expected level of quality and productivity associated with a particular job that it finds acceptable (Kelly, 2020, p. 183).

HIM Position	Benchmark	Accuracy
Document Imaging Specialist	Scan 10–15 records per hour or 75 documents per hour (Kelly, 2020, p. 183) (Knight, 2004)	97% (Kelly, 2020, p. 183)
Chart Analysis	Inpatient: 6 per hour Outpatient: 10 per hour (Kelly, 2020, p. 183)	98% (Kelly, 2020, p. 183)
Coding	Inpatient: 3.2 charts per hour Outpatient: 6 charts per hour (Kelly, 2020, p. 183)	Coding: 95% DRG: 97% (Kelly, 2020, p. 183) (Knight, 2004)
ROI	Medical: 4 requests per hour 4-day average turnaround Legal or subpoena: 2 requests per hour 5-day average turnaround	Medical: 98% Legal or subpoena: 100% (Kelly, 2020, p. 183)
Transcription	100 lines per minute (Kelly, 2020, p. 183)	98% (Kelly, 2020, p. 183)

(Kelly, 2020, p. 144, 277-79)

Remote HIM Training Manual

A Dedicated Home Work Environment

- Design a threshold to separate your workspace from the rest of your home.
- Working long hours on a couch or other place in an improper position with inadequate posture will lead to pain and discomfort.
 - Use a comfortable chair.
 - Use proper desk and computer height.
- Use adequate lighting so you can see the data and how to complete your tasks. It also reduces eye strain for long working hours.
- Centralize your equipment, technology, tools, and supplies in your workspace for easy and quick access without leaving your work area.
- Get organized, and find a home for everything.
- Use a bulletin board for quick reference and for those who are visual.
- Personalize your area to your productivity needs and working style.

(Dalley, 2014) (Kelly, 2020, p. 185-86, 277-79)

Dealing with the Challenges of Working Remotely

- Self-motivation is essential for success. Employees who work well remotely are self-disciplined and do not need constant monitoring.
- Your dedicated work area encourages productivity by:
 - Physically separating your home and work life and regions.
 - Eliminating distractions and setting boundaries. Creating a separate work area will assist you in maintaining a quiet place and keeping out anything that may be distracting, like family members or a television.
 - Use a busy sign for your door or area to signal to others in the home that you are busy and should not be disturbed.

- Set a schedule and routine to help separate your home and work life and manage productivity and workflow.
- Use a productivity app and take short breaks. One method is the Pomodoro technique. Set a period to work and then reward yourself with a five-minute break or even a longer break for a more extended period worked. This technique will help you stay focused, manage your time, and resist distractions.
- Working remotely can cause a feeling of isolation. Connect with co-workers virtually for a few minutes every day to lessen the sense of isolation.

(Dalley, 2014) (Delahoussaye, 2020) (Knight, 2004) (Kelly, 2020, p. 185-86, 277-79)

Benefits of Scanning Documentation Immediately:

- Scanning documentation should be a priority, so coders never run out of charts to code.
- Documentation is available more quickly for all other HIM areas once it is scanned for coding.
- Bottlenecks in the HIM and coding departments are reduced or eliminated because the documentation can be accessed more quickly online by multiple people simultaneously.
- Chart completion and deficiency analyses can begin promptly.
- HIM can give records to physicians earlier and without waiting for coding.
- Auditors now have immediate online access and do not need to access records physically.

(Knight, 2004) (Kelly, 2020, p. 277-79)

Best Practices:

- Several best practices will help facilitate a smooth transition to a remote workforce.
- Scan documentation immediately to ensure coders and other personnel have access quickly to begin their duties.
- HIM will no longer pull records for reviews and personnel of other departments. Immediate user access to the online record will be given instead.
- Auditors will also be granted online access so that reviews can be conducted remotely.

- Phase II:
 - Giving additional relevant internal personnel online access to records will greatly reduce the number of charts physically retrieved and filed again.
 - Once all records are fully online, chart completion staff can phase into remote work because there will no longer be a need to access physical charts.
 - Physicians will have the ability to view and complete charts online from anywhere.

(Knight, 2004) (Kelly, 2020, p. 277-79)

New Physician Query Process

- The physician query process is the HIM task most affected by coders transitioning to remote working.
- Coders will use a Microsoft Word query template.
- Coders will e-mail the completed query template to document imaging specialists who remain on site.
- A document imaging specialist will process, print, and file the query in the record.
- Document imaging specialists will follow up with the physician for a quick response.
- The physician sends a response to HIM.
- Document imaging specialists scan the answer and query and add them to the EHR.
- The chart will then be returned to the coder who initiated the query.

(Knight, 2004) (Kelly, 2020, p. 277-79)

References

AHIMA Privacy and Security Practice Council. (2007, July). Safeguards for Remote Access.

AHIMA HIM Body of Knowledge.

<https://library.ahima.org/doc?oid=71946#.YMz5v76SmMo>

Dalley, J. (2014, Jan. 2). 6 Ways To Define Your Workspace At Home. *Forbes*.

<https://www.forbes.com/sites/houzz/2014/01/02/6-ways-to-define-your-workspace-at-home/?sh=1081345f49e0>

Delahoussaye, E. (2020, Aug. 25). Working from Home During COVID-19: Challenges and Solutions. *Journal of AHIMA*. <https://journal.ahima.org/working-from-home-during-covid-19-challenges-and-solutions/>

Kelly, J. R., & Greenstone, P. S. (2020). *Management for the Health Information Professional*. (2nd ed.). Chicago, IL: AHIMA Press.

Knight, B. (2004, July 6). Three Steps to Remote Coding Success: The Sun Health Experience.

AHIMA HIM Body of Knowledge.

<https://library.ahima.org/doc?oid=58476#.YMz49L6SmMo>

Kohn, D. (2009, March). How Information Technology Supports Virtual HIM Departments.

AHIMA HIM Body of Knowledge.

<https://library.ahima.org/doc?oid=89198#.YMz46b6SmMo>

Servais, C. (2009, March). Virtual HIM: Considering the Transition to Remote Departments.

AHIMA HIM Body of Knowledge.

<https://library.ahima.org/Doc/F/0/E/89199#.YMz4976SmMo>

Walls, L. L. (2004, March). Managing the Virtual HIM Department. *AHIMA HIM Body of Knowledge*. <https://library.ahima.org/doc?oid=57950#.YMzpRr6SmMp>

Yousfi, S. (2020, Aug. 21). Five Tips for Success as a Remote HIM Professional. *Journal of AHIMA*. <https://journal.ahima.org/five-tips-for-success-as-a-remote-him-professional/>