

Leading Enterprise Content Strategy with HIM

*An executive guide for acquiring a document
management and imaging platform*

Leading with HIM

Historically, many healthcare organizations have taken a decentralized, siloed approach to digitizing their documents and processes. Often, these efforts have been conducted at the department level, and executed independently from other groups and functions within the organization. At the time, few could have predicted just how fractured content would become, or the negative impact it would eventually have on operational efficiencies throughout the enterprise.



Today's value-based care initiatives are driving demand for a more complete, current, and accurate care profile that traverses the patient experience from referrals and scheduling to clinical documentation, revenue cycle management, and beyond. To accomplish this, healthcare organizations must work to unify their digital content management systems. This is done by establishing a proper information governance policy and investing in a document management and imaging (DMI) system that can help bring structure to unstructured data. The system should govern both clinical and nonclinical information, such as human resources, operational, financial, legal, and marketing information.

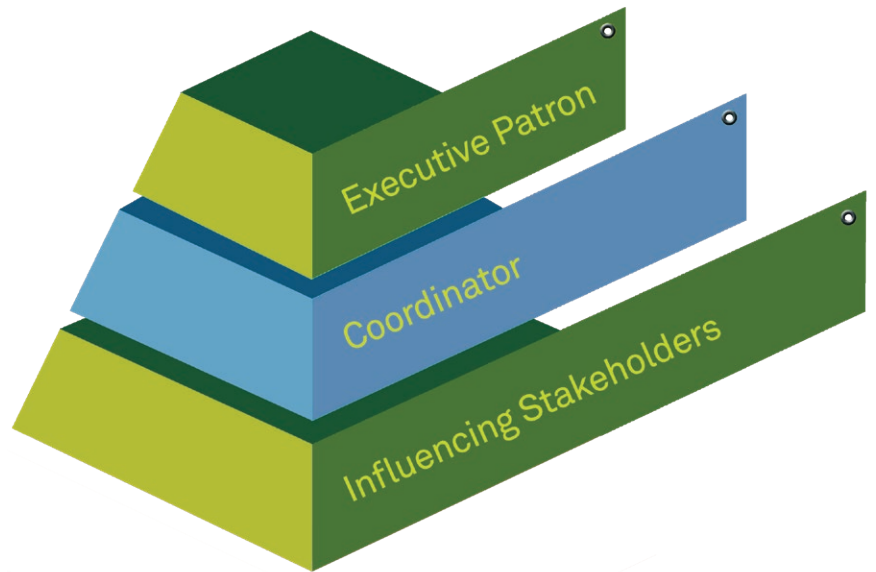
The process of selecting and implementing a DMI platform can be daunting. Some healthcare organizations may find it difficult to discern who should be involved and who is best suited to lead the process. This white paper will help you better understand the value that various stakeholders within your organization can bring to this process, as well as provide insight into the potentially untapped value that health information management (HIM) leaders can contribute to the decision-making and implementation of a DMI system. Further, you can gain a greater understanding of the differences between HIM and health information technology (HIT), and how their roles and responsibilities best fit into the adoption of enterprise content management (ECM).



Assembling a DMI Acquisition Team

The first step toward adopting a DMI platform should focus on the most important component of the process: your people.

Modern healthcare ecosystems consist of a variety of organizations and stakeholders who share common goals, but with unique interests and specializations. It may be difficult to discern who should be involved in any enterprise-wide initiative, particularly when it comes to information management. Selecting the right people can help guarantee the success of your DMI system selection and implementation.



As you begin to assemble your team, it is important to assign people into three groups/roles: an executive patron, coordinator, and influencing stakeholders. This team structure will help ensure that the project remains on time, on task, and on budget, while providing a chain of command that helps settle disputes expediently. If your organization has limited experience with implementing enterprise software, you may also want to consider seeking external support from an experienced consultant.

To determine the best candidates, consider the qualifications and expectations outlined below for each role.

Executive Patron



The executive patron is an individual who can lead the development of the business case and has the authority to make a purchase decision. Due to the transformative nature of enterprise software, this person should also hold a management position that covers most, if not all, areas of the organization impacted by the implementation of a DMI system.

Identifying the appropriate executive patron will require you to look deeper than job titles. For smaller enterprises, the ideal executive patron could be a C-suite executive. At a larger organization, the best person may be in a department-level leadership position. Regardless of title, identify a person who has earned peoples' respect, can effectively settle disputes, is decisive, and can keep their sights set on the bigger picture. It is up to you to help influence or determine the person in your organization who best exemplifies these qualities.

Coordinator

The coordinator should serve a hybrid role of project manager and implementation manager. From start to finish, this individual is responsible for overseeing the software selection process. This includes outlining procedures and timelines, as well as selecting the appropriate personnel to be involved in each stage of the project.

Identifying a coordinator is one of the most crucial decisions in selecting a DMI platform. The ideal candidate should have an intimate understanding of how ECM will affect your fundamental healthcare operations. They should be deeply involved with your information governance policies and familiar with the current IT infrastructure of your organization. These qualities are invaluable to a coordinator's role in establishing procedures, assigning tasks, and coordinating a smooth progression toward implementation.



Internal Stakeholders

The impact of adopting a DMI system will ripple throughout your organization. That's why it is so important to have representatives from each department participate in the selection process from start to finish. The most critical functional disciplines should include clinical, health informatics, IT, operations, legal, compliance, risk management, finance, and human resources.

In building out a group of internal stakeholders, you should be open-minded concerning qualifications. Do not limit your prospects based on experience or job title. Instead, focus on finding individuals who are insightful and open to change. The ideal candidates should also possess the following 4 qualities:

- **Expertise in their respective field**
- **Understanding of workflows and processes across healthcare enterprise**
- **Respect from others in their department**
- **Aptitude to become power users and ambassadors**

Internal stakeholders not only play a critical role in defining ECM requirements for their respective business units, but also help drive acceptance and adoption. These team members should be capable of documenting operating parameters and training additional users during and after the implementation phase. This will help ensure rapid internal adoption of the DMI system.



External Consultants (optional)

If adoption of enterprise-wide systems is a new concept to your healthcare organization, it is encouraged that you seek the support of an external consultant.

There is a wide variety of external consultants in the healthcare technology market. Some work independently, while others work for larger groups. They may also offer their services regionally or nationwide. To identify the right consultant, be sure to ask for any prior case studies and references from organizations that are similar to your own, particularly in terms of size and specialties. The ideal candidate will also have experience working with your existing infrastructure, including any EMR or ERP systems.



If your organization does not have the budget for external advisors, you can also seek advice and recommendations from other healthcare organizations or the vendors you work with whose systems will be integrating with the DMI.

Assembling a DMI acquisition team can be a daunting process. However, if you invest the time, energy, and resources into following these guidelines, you are likely to improve the implementation speed and overall success of your software selection.



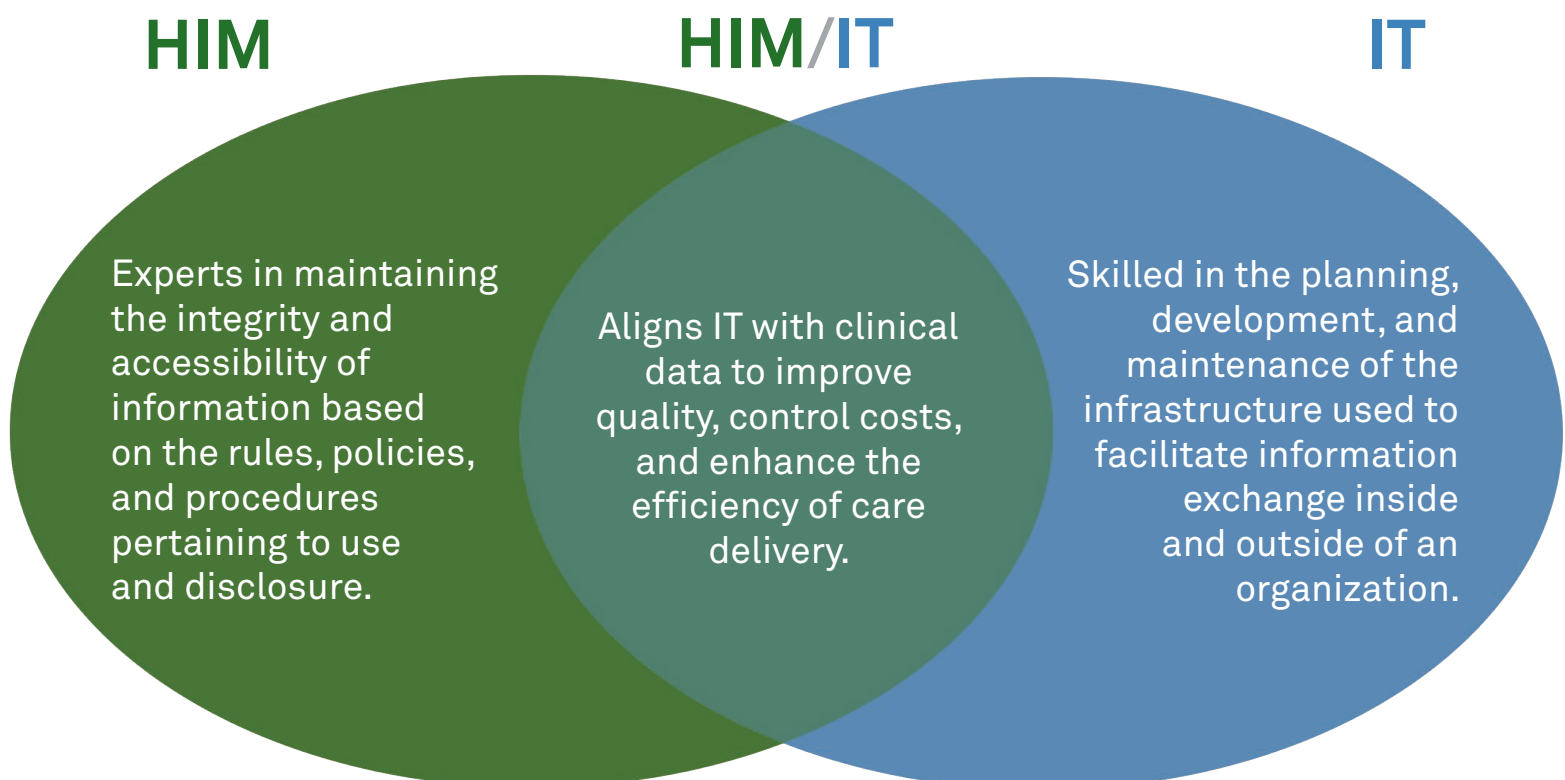
HIM vs IT (and the rise of HIM/IT leaders)

As your organization embarks on its search for a DMI platform, two departments will likely play integral roles: HIM and IT.

In non-healthcare-related enterprises, the IT organization has traditionally served 3 primary functions: governance, infrastructure, and functionality. Included within these functions would be the strategic planning and implementation of enterprise-wide software to support business goals. Based on this precedent, you might assume that a healthcare organization should follow a similar leadership protocol when acquiring a DMI system. However, many modern healthcare enterprises also employ HIM specialists who serve different—but frequently overlapping—roles to those of traditional IT professionals.

According to the committee on professional development of the American Health Information Management Association (AHIMA), HIM professionals are responsible for improving “the quality of healthcare by ensuring that the best information is available for making any healthcare decision” by overseeing healthcare data and information resources.¹ This includes leadership in “planning, collecting, aggregating, analyzing, and disseminating individual patient and clinical data.”¹ These expectations, combined with the increasing digitization of health data, have led to a convergence of the HIM and traditional IT roles at the intersection of clinical and general information management. It is at this junction that the selection and implementation of a DMI system occurs.

Be aware and be prepared—the overlapping interests and responsibilities of HIM and IT roles may fuel some debate within your organization as to which department should help lead your ECM efforts. During these discussions, it is important to emphasize how the expertise of each department affects the primary objective of patient care.





Leading with HIM

While the successful implementation of a DMI system relies on the knowledge and skills of numerous job functions, the foundation for this process should be built on HIM competencies. The HIM department's intimate knowledge of personally identifiable health record data across the care continuum should act as the blueprint for your systems architecture. By combining these insights with the technical and operational skills of your IT organization, you can establish a sound technical infrastructure.

HIM professionals also carry several skills and qualities that make them ideal candidates to help lead DMI acquisition efforts. As data administrators, they possess a keen understanding of common data standards that can improve interoperability. Additionally, their persistent focus on improving patient care can help keep your acquisition team focused and qualify them as exceptional intermediaries when conflicting opinions arise between stakeholders.

A study published by AHIMA sought to examine HIM leadership through the lens of Bowen theory. Focus groups, observations of meetings, and face-to-face interviews were conducted to survey HIM directors and managers, along with administrators and colleagues of HIM leaders. The study found that "HIM professionals are highly valued and are considered the center of the organization." Some of their most appreciated qualities included expertise in EHR functions, privacy, security, and coding.² These are all core competencies for the planning and execution of healthcare ECM.

Strong leadership is defined by a wide variety of personal characteristics, in addition to professional skillsets. Because of this, the best leader for your ECM efforts may not always be within your HIM organization. However, the HIM department is an ideal place to start your search, and should be viewed as an invaluable resource throughout the acquisition and implementation process.

Summary

Achieving value-based care objectives in a modern healthcare enterprise demands a structured approach to content management. While DMI systems are a powerful tool for helping your organization unify its data, the process of acquiring and implementing a solution requires full buy-in and support from senior management as well as clinical and business leaders. As stewards of your organization's clinical data, HIM officers are vital to this process. Working together with your IT organization, they can help you establish a strong technical foundation, and help select the DMI platform best suited for your business.

With several DMI technologies available on the market, it is also important to consider the background and qualifications of each vendor. Selecting a DMI vendor that has intimate knowledge and experience with healthcare can have a significant impact on the success of your DMI implementation. Working with a provider that can speak the same technical language as your HIM and IT leaders, while articulating how a DMI system ties into the patient experience, is invaluable. Such a vendor can better assist with your overall organizational goals, including financial savings, efficiency gains, and risk mitigation.

Working with customer representatives that have previously served in HIM or HIT roles can provide a greater degree of understanding. They can more easily relate to your challenges and needs because they have experienced them first-hand. They also know the importance of dedicated, agile, and attentive support when it comes to enterprise content management. When adopting a new DMI platform, these attributes can help ensure a successful implementation, as well as long-term support.



Discover additional considerations when shopping for a DMI platform by downloading our white paper, **“10 things to look for in an enterprise document management vendor”**

Sources

1. Xiaoming Zeng, MD, PhD; Rebecca Reynolds, EdD, RHIA; and Marcia Sharp, MBA, RHIA. Redefining the Roles of Health Information Management Professionals in Health Information Technology. American Health Information Management Association (AHIMA). Accessed January 15, 2020. <https://perspectives.ahima.org/redefining-the-roles-of-health-information-management-professionals-in-health-information-technology/>
2. Patty Thierry Sheridan, MBA, RHIA, FAHIMA; Valerie Watzlaf, PhD, RHIA, FAHIMA; and Leslie Ann Fox, MA, RHIA, FAHIMA. Health Information Management Leaders and the Practice of Leadership through the Lens of Bowen Theory. American Health Information Management Association (AHIMA). Accessed January 15, 2020. <https://perspectives.ahima.org/health-information-management-leaders-and-the-practice-of-leadership-through-the-lens-of-bowen-theory/>

