

Feature Story | Hybrid Medical Records: Reality and Risks for Today

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Managing in a hybrid environment is the reality faced by many health information management (HIM) professionals today. As hospitals transition from paper to electronic records, HIM departments must process, manage, and maintain medical records in both paper and electronic formats. There are significant and ongoing changes in workflow, technology, and staffing as this transition occurs. The potential for customer satisfaction, productivity, and compliance issues abound.

The goal is to avoid creating new problems while you develop and implement solid policies that will smooth your transition through the hybrid and into the EHR environment. Savvy HIM directors network with peers and learn from others whenever and wherever possible.

HealthPort brought together HIM professionals across the country in a roundtable format to share ideas and uncover new solutions. Forty-nine percent of the roundtable attendees plan to implement electronic health records within the next 12-24 months and the majority, 55%, has more than half of their medical records still in paper format. This article summarizes our key findings and provides a clear foundation for understanding both the risks and rewards of the hybrid world.

Hybrid Defined

Roses, automobiles, medical records—they are all available in a hybrid option. When it comes to medical records, HealthPort believes that any health information department that has an electronic component (e.g. housed in an electronic health record - EHR), a paper component (maintained in paper format), and any other medium (e.g. historical records on microfilm) should consider themselves operating within a hybrid environment. Electronic information may be in the form of scanned documents or individual data elements stored within an electronic system but outside of the organization's EHR. The bottom line is that a hybrid environment exists when information is stored in different systems and various formats.

According to the HIM professionals interviewed, managing in a hybrid environment with part paper, part electronic, and part microfilm is the biggest challenge today. The three most common issues were identified as:

- Meeting key performance indicators (KPIs) in a hybrid environment and/or while implementing a new system is a challenge. Additional staff are usually needed but seldom budgeted for. Some lessons learned include:
 1. Re-evaluate and re-define your KPIs during the transition;
 2. Establish new processes to monitor/report performance to executives;
 3. Communicate progress and establish realistic expectations;
 4. May need additional staffing to keep up (especially w/ revenue cycle);
 5. Don't make the mistake of cutting or re-allocating staff too soon.
- The hybrid environment actually prolongs the time necessary to gather all patient information. In the paper world, it is all in one place—the chart. In a hybrid world, patient information is spread across several locations. Ultimately, HIM departments will relinquish "chart pulls" as end users retrieve information online.
- In reality, the conversion from a hybrid record to a completely electronic environment is more difficult than converting from paper to electronic.

By understanding these realities upfront, HIM departments can minimize the unintended consequences of today's hybrid environment. All healthcare organizations are moving towards an EHR. The journey is a collaborative, team effort between vendors and hospitals. We all must work closely together so that everyone can succeed.

Get Everyone on Board

If it takes a village to raise a child, it takes an entire hospital to implement an EHR. Electronic record systems are much more than a single piece of software that can be installed and left alone. EHRs require a complete change in the mindset of everyone from HIM staff to physicians and administration. Everyone must embrace the new culture of electronic versus the old-fashioned culture of paper. Some examples include:

Emergency Department Physicians

Emergency department physicians consistently reference four key dictated reports: (1) history and physical, (2) discharge summary, (3) operative notes, and (4) consult reports. Instead of asking a nurse or unit manager to find the chart and review on paper, the physician can now retrieve the record online and view the same four reports within seconds.

Two mindsets must be changed-first, physicians must start relying on themselves to retrieve a record versus asking a nurse or manager to get the chart. Secondly, they must begin to get comfortable with reading documents on the computer monitor instead of on paper.

Clinical Coders

Coders are used to reading a tangible, paper chart to assign clinical codes to each case. In both a hybrid and a completely electronic world, information no longer exists on paper. They must look in several different systems to complete their work. The resultant process can place a significant drag on productivity and morale. HIM directors interviewed suggested a two-phase approach:

Step One: Redesign the HIM department to include noise blockers, furniture redesign, and I-Pods to drown out noise. This helps them focus when intense computer time is needed and will help support maximum productivity until a completely electronic system is in place.

Step Two: Once a completely electronic environment is achieved, allow coders to work from a remote location including home. Working from home is one of the strongest recruitment and retention tools available today.

These are only two examples. Many more employees and workflow processes will be impacted by hybrid records. It is important to review each process in depth throughout the transition and address hybrid-record specific issues. Avoid workarounds and re-work whenever possible and keep the end goal in mind-shorten steps and save time!

The Role of Document Management Systems

Electronic document management systems (EDMS) play an important role in the migration from paper to electronic records. With the ability to capture both paper documents and electronic data from any location across the enterprise, EDMS technology is the best way to bring disparate information together into a single view. Additionally, an EDMS is the only way to combine historic records with current charts.

According to the Health Information Management Systems Society, 60% of chief information officers plan to implement document imaging within the next two years,ⁱ and many HIM departments have already implemented an EDMS. It is important to note that the presence of an EDMS is NOT the determining factor in a hybrid environment. An EDMS may or may not be present. However, an EDMS can certainly help ease the pain of operating within a hybrid environment and help bridge the gap between paper and a complete EHR.

HIM departments should learn how an EDMS could help them beyond capture and storage. An EDMS can relieve the pressure of hybrid record management by providing a quick and easy way for providers and clinicians to see all patient information in one, central view-near real-time. Finally, an EDMS lays the foundation for a more patient-centric environment where cases can be reviewed, discussed, and treated collaboratively versus retrospectively. Ultimately, this helps all of us achieve our goal-healthier patients and better care.