

12/9/02

### **Designing a Remote Coding Program: Seven Steps to Success, Part III**

*Leslie Ann Fox, MA, RHIA and Patty Thierry, MBA, RHIA, CCS*

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**Leslie:** In our past two Hands-On Help columns we covered the first four steps in designing a remote coding program: obtain executive sponsorship, create a remote coding project team, create and communicate a remote coding vision and select remote coding technology. In this column, we discuss the remaining steps: perform a remote coding readiness assessment, develop a work plan and implement the work plan.

**Patty:** While I don't recommend skipping steps, there are some steps that can be initiated concurrently. We recommend that while the remote coding project team is selecting the right technology (Step 4), it can begin Step 5, the readiness review of key health information management (HIM) functions, human resources (HR) and information technology (IT).

**Leslie:** In our experience, this step has been invaluable. The readiness review assesses the need for coding process redesign, identifies the IT infrastructure capabilities and provides insight into change management challenges. The review is critical in the building of a work plan, which is Step 6. The results of the review lead to a customized implementation approach, long-term success and fewer bumps along the way.

**Patty:** It is helpful to have a third party perform the readiness review simply because they can observe and question processes more objectively. In addition, most HIM managers don't have the time and have yet to gain experience in implementing remote coding. An objective HIM consultant is better able to observe the culture and draw from a knowledge base of past experience and industry best practices. They also have the process re-engineering experiences and skills to identify processes that are not easily transferable to remote coding programs.

**Leslie:** What is typically included in a remote coding readiness review?

**Patty:** Let's start with the management of the medical record first. The assessment focuses on the flow of data from the point of registration to discharge. This is a particularly important part of the assessment if the organization's electronic medical record (EMR) is to be used as a source of data during the coding process.

Then the HIM processes are evaluated. In an environment where the record is primarily paper-based, the focus tends to be on the flow of the record from discharge to the completion of key documents required for coding. In an EMR environment, the focus is on the integrity, timeliness and completeness of the data as well as the processes and system functionality for capturing, routing, storing and retrieving that data.

**Leslie:** In our experience, HIM professionals who have implemented remote coding using EMR components usually face similar challenges: limited remote access capabilities or in some cases none at all, the lack of coding workflow and the lack of EMR component integration requiring coders to toggle back and forth to view three to five different databases during the coding process.

**Patty:** HIM professionals implementing remote coding in paper intensive environments have told us that they underestimated the amount of process re-engineering required to enable remote coders to have a steady flow of work available. These processes include timely receipt of records, discharge processing and loose report activities, record completion processes and reconciliation activities.

**Leslie:** These are processes that typically hum along. Why is this a focus of a remote coding readiness review?

**Patty:** Because they do just that, hum along with all the workarounds that have been built over the years. We have sometimes been our worst enemies by building too many checkpoints or hand offs in the process to make it more complicated than necessary. In general our experience has found that there is usually opportunity to improve efficiency and reduce the number of days it takes to go from point A to point B. Tweaking these key processes results in better utilization of resources and optimal use of technology investments.

**Leslie:** What about the coding processes. What is typically assessed in this area?

**Patty:** The entire process is reviewed with a special focus on work distribution processes, the physician query process, coding education, quality assurance (QA) activities, and other processes such as managing unbilled accounts, productivity monitors and the handling of missing documentation, demographic errors, wrong patient types and coding questions among the coders. All of this is assessed with an eye toward what aspects of the current workflow would require re-engineering to transition to a remote environment. Another part of the assessment is reviewing issues related to the HR department, specifically the telework policy. Coding managers will want to review any existing policies and begin thinking about telework requirements early on in the project.

**Leslie:** In organizations that have home-based transcriptionists, little work will be required to modify telework agreements for coders. Organizations that implement telework programs for the first time will be required to develop a telework policy and a telework agreement. These policies are important because they define the “rules” of telework.

**Patty:** We often get asked how organizations are handling who purchases what. We find that most organizations provide coding resources and purchase computer workstations so that they can control and standardize hardware and software resources. Who pays for Internet access is less important and we are seeing more organizations asking coders to foot this expense. Coders are often responsible to purchase their own furniture and are always held accountable for securing their work area from family and visitors.

**Leslie:** Because we dedicated a Hands-On Help column to this topic—Coding Policy: Getting Started—let’s talk about the final assessment area, technology.

**Patty:** Some of the technology issues may have been discussed during the review of current and future system designs. The focus of this part of the review is to assess IT readiness against the requirements of each remote coding technology option identified in Step 4, selecting remote coding technology. For example, each option will have some remote access requirement. Part of the assessment would be to determine if the current remote access method supports coding production goals and has adequate capacity to support the expanding number of remote staff.

The team will also need to identify current and future computer workstation standards (operating system, software, RAM, disk space, hardware, monitor size, etc.) as this information will be necessary to set standards for the computer workstations for remote coders. These standards should also be compared against the

remote coding technology requirements. Other topics that are part of the review include data security such as audit trails and help desk support for remote employees.

**Leslie:** Having completed the readiness review, the team is now ready to go on to Steps 6 and 7, Develop a Work Plan and Implement the Work Plan. The plan should include tasks, planned start and completion dates, team members assigned to the task and an owner who will be responsible for ensuring that each task is accomplished. This plan should be created in a format that is easy to update and one that can be shared by all electronically. The team's project manager should also use an issues tracking spreadsheet to track and resolve issues as they arise.

**Patty:** To best manage the project, the plan should be organized by functional categories. This is typically called a work breakdown structure (WBS). We discussed remote coding WBS in our column titled "The Remote Coding Project Manager's Role." In that article and in the article "An Introduction to Project Management," we discussed project management fundamentals such as developing and implementing work plans. (All past columns can be found on [www.ADVANCEforHIM.com](http://www.ADVANCEforHIM.com).)

**Leslie:** Those are good references for Steps 6 and 7 and therefore we won't repeat ourselves. But I do want to mention the importance of celebrating major milestones.

**Patty:** Good idea. We often don't stop to recognize key accomplishments along the way. Celebrating with the team and the departments involved in the implementation is an important activity in the change management process. It gives the team a chance to share their vision, update others on the project status and celebrate an accomplishment. It also serves to keep the team motivated and keep the momentum going. Once momentum stops, a project really suffers.

**Leslie:** In John Kotter's book Leading Change, he identifies several reasons why projects fail and most are a result of communication failures—such as failing to communicate the urgency to make a change, or not communicating the vision clearly enough, or failing to communicate when the vision, processes or timelines change.

**Patty:** The reality is all projects will experience some bumps as a result of incomplete planning, new information that was not anticipated or as a result of communication failures, just to name a few. "Rule Number 6" has helped me through work-related stressful situations. Rosamund Stone Zander and Benjamin Zander write about Rule Number 6 in their book The Art of Possibility. Rule Number 6 is their way of saying lighten up and don't take yourself so seriously. Our ability to respond in a clear-headed manner to our challenging work environments is more important than ever.

**Leslie:** I agree. How we respond to set-backs is more critical than the setback itself. Being able to acknowledge a less than ideal situation and identify the necessary next steps is critical to achieving overall success. That is difficult to do if you take yourself too seriously.

**Patty:** I think Rule Number 6 will come in handy in the coming years as HIM migrates to e-HIM—HIM practice in an electronic environment. Transitioning toward e-HIM will require HIM professionals to become change leaders, build stronger relationships with IT, recommit to life-long learning and share our experiences with one another.

Rule Number 6 can help us remember to lighten up when things get challenging. It will enable us to think more clearly and see our options.

**Leslie:** Our column for next year will focus exclusively on e-HIM. We will follow the work of AHIMA toward this

effort, and bring stories from the trenches to our readers. It promises to be another exciting year!

Patty and I thank you for your readership this year and look forward to discussing e-HIM next year.

We also thank Lisa Algeo, the editor of this column for all her assistance and are pleased to be working with her again next year.

We wish all our readers a peaceful holiday and great success along your e-HIM journey.

*Leslie Ann Fox is president and chief executive officer and Patty Thierry is vice president and chief information officer of Care Communications Inc., a Chicago-based HIM services company. They invite their readers to send their thoughts and opinions to [lfox@care-communications.com](mailto:lfox@care-communications.com), or [pthierry@care-communications.com](mailto:pthierry@care-communications.com).*