RELEASE OF INFORMATION: CAN YOU AFFORD TO IGNORE INDUSTRY CHANGES?

EXECUTIVE SUMMARY

As demands to share patient health information continue to evolve, provider organizations are challenged to take new approaches to Protected Health Information (PHI) disclosure management across their health systems. Increased requests for access to and exchange of health information, compounded by stringent compliance regulations, present multiple challenges for Health Information Management (HIM) leaders.

- **Large volumes of government and commercial payer audits.** There has been a steady increase in DRG post-payment audits and Health Effectiveness Data and Information Set (HEDIS) and Risk Adjustment reviews. This rising volume of requests from payers heightens the burden on HIM to handle the associated Release of Information (ROI) demands.

- **Enterprise-wide compliance and breach prevention.** Privacy and security within a healthcare enterprise are top of mind in an era of regulatory reform and breach. With risks including financial penalties, lawsuits and reputational damage, HIM leaders are seeking ways to mitigate risk and close compliance gaps.

- **Patient satisfaction.** New privacy rules aim to give patients control over how their information is used. Situations involving patients' privacy rights are difficult to navigate. Healthcare organizations must be sensitive and proactive regarding privacy rights and disclosure of PHI.

To understand how HIM leaders are balancing these multiple challenges related to Release of Information, MRO commissioned a nationwide survey with Porter Research, a market intelligence and research group focused on healthcare IT.

The findings of the survey provide valuable perspectives to help HIM professionals navigate the complexities of the rapidly evolving ROI industry.

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Respondents

Porter Research surveyed senior HIM professionals to gain insight into their PHI disclosure management improvement priorities and strategies, including reasons and criteria for transitioning to new ROI vendor partners. All respondents held responsibility for developing and managing their organization's ROI budget as well as setting strategic priorities.

Executive insights in this report represent

33 hospitals   **1253 clinics**   **620,719 ROI requests annually**

This report serves as a guide for assessing PHI disclosure management strategies and processes and evaluating ROI vendors. Some questions covered include:

- When is it time to consider a new strategy and ROI partner?
- What are the essential attributes of an ROI vendor?
- What key decision criteria matter the most to healthcare organizations?

WHEN IS IT TIME TO CONSIDER A NEW STRATEGY AND ROI PARTNER?

According the Porter Research survey results, leaders within healthcare organizations have been prompted to seek better ROI solutions after two distinct events. One, they are dissatisfied with their current vendor due to poor quality and service, including occurrences of breach. Or, they require more sophisticated, streamlined solutions to meet enterprise-wide compliance and operational needs as their systems grow through mergers and acquisitions.

Top two business problems or reasons for outsourcing:

Dissatisfaction with current vendor
Failure to meet SLAs, rise in breaches, lack of support for clinics

"Our previous vendor was not meeting key areas of our SLAs, so we decided to consider a change. Because we have multiple facilities in our system and are always adding new facilities, we were looking for a vendor that could meet our needs and handle that type of volume."

"There were a lot of breaches, and we didn't feel our former vendor was looking at the breaches with a sense of urgency and resolution from top leadership."

"Our previous vendor did not supply adequate support for clinics."

Standardization of ROI process
Need for one EMR and one ROI vendor across multiple locations

"We needed to standardize the Release of Information process for our 3,496 providers within the healthcare organization. Some were using a different vendor, some were doing releases themselves, and some were not responding to requests for medical records. So, we needed to standardize the Release of Information process across the entire health system."

"When we went to Epic, our health system transitioned from four different medical record platforms to a single medical record platform and a single MPI. We combined the Release of Information functions for three of those entities."

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WHERE TO START: 5 ESSENTIAL ATTRIBUTES OF AN ROI VENDOR

According to survey results, in most evaluations there were three or more ROI vendors considered initially, with two usually making it to the short list. Porter Research revealed five essential criteria that respondents said they look for in an ROI partner. Whether you're about to undergo a big transition from an in-house ROI model to an outsourced one, or you're considering changing to a new partner, HIM leaders recommend these certain characteristics should not be overlooked. Be sure to check each of these boxes when determining your short list of vendors.

☐ **EASE OF USE**

☐ **WORKFLOW**

☐ **ABILITY TO HANDLE VOLUME**

☐ **TURNAROUND TIME**

☐ **INDUSTRY REPUTATION**

"I wanted it to be easy to work through the system. For example, if I need a request, I don't want to go through 50 steps to be able to look for that request."

"Reporting capabilities are very important to me. I wanted to be able to go to the system myself and not have to depend on the vendor to provide me with information. I have to report to leadership every Friday, and I do not want to depend on a vendor to give me the information I need."

"The criteria we considered were turnaround time, ease of use, access to their system, the workflow and the pricing model."

"Because I have oversight of all the provider offices, if I want to look at a specific specialty group and see how their requests are being processed, or what the turnaround time is, I do not want to depend on the vendor to tell me that. I want the ability to go in and enter that provider's office information and run a report myself."

"I think it was primarily the services provided, as well as reputation in the industry. Those were the key drivers for making it to the short list."

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WHERE TO DRILL DOWN: DECISION CRITERIA

Once essential attributes are vetted, it's important to perform an analysis of how the details within an ROI agreement perform against your own organization's KPIs. Survey respondents rank the following decision criteria in order of importance to their organization.

Integration and Technical Features: 29%
Compliance: 28%
Level of Service Engagement: 28%
Price: 14%
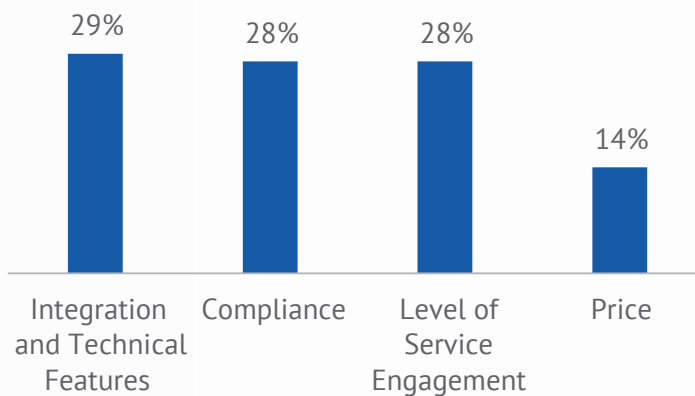
In the final hours of the decision-making process, what were the key factors that led your organization to select a vendor?

"I believe the level of service engagement was the key factor."

"I think we were at a point of being very dissatisfied with our prior vendor. When we reached out to the vendor to make changes, they did not make the changes we requested."

"The winning vendor had quality embedded in their whole process. When the records went out, they made sure they had the right records based on a quality initiative incorporated throughout the process."

KLAS data: A tool for ROI vendor comparison

A resource to consider using to collect peer feedback on the attributes of ROI vendors is KLAS, a research firm that rates healthcare services and technology vendors by collecting feedback from more than 30,000 provider and payer interviews annually. The data collected by KLAS is "honest, accurate and impartial," and can be used as a trusted comparison tool for HIM professionals as they evaluate potential vendor partners. The data is available on the website www.KLASresearch.com. Each year, the firm releases a Best in KLAS report that shows how vendor performance scores compare.

Live data and Best in KLAS reports are not the only resources for HIM and other healthcare professionals to gain insights about ROI vendors. KLAS has also released performance reports covering the topic, including "HIM Services Performance 2015: Coding, Transcription, Release of Information" and "Release of Information 2018: Who Delivers Most Consistently Across Customers?"

ROI technology: Automation and integration

HIM leaders report to Porter Research that advanced ROI vendors offer innovative technology solutions that improve accuracy and efficiency. Respondents noted the importance of using optical character recognition technology in the quality assurance process to correct comingled records and drive high accuracy rates, and the necessity for having a full integration between their ROI system and Epic EMR's release module.

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WHO SHOULD BE INVOLVED EARLY IN THE ROI VENDOR SELECTION PROCESS?

As ROI becomes more complex, additional stakeholders are called to the table to evaluate vendors. The following key players are referenced in the survey results and should be considered during your evaluation process.

- CFO
- CEO
- Privacy, Legal, Health Information Management or Compliance Officer
- Medical Records Director/Manager/Supervisor
- Corporate Manager of ROI
- Corporate Director of Health Information Services
- Corporate Director of Integration
- Supply Chain Director
- Contract and Reimbursement
- VP of Finance
- VP of Revenue Cycle

HIM directors are known leaders within their departments and across the healthcare organization—57 percent of respondents considered themselves to be the final decision maker.

SUMMARY

Given the Release of Information demands described in this report, an enterprise-wide approach to disclosure management isn't a far-sighted goal, it's a must-have. HIM and ROI teams are pursuing strategic partners to address the complex needs of their organizations. In evaluating vendors, the guiding forces in decision-making include reputation, service, quality, technology and accountability.

The information shared by respondents should assist progressive HIM directors who seek to move from in-house to outsourced ROI models and those who are changing ROI vendors if already outsourced.

PORTER RESEARCH

Porter Research works with healthcare and IT companies to develop and execute market research programs and create strategies using market intelligence uncovered. With 30 years of experience, we have worked with more than 300 IT companies, and complete thousands of interviews each year. This means we know your industry, we know how you need to use the data, and we execute the right research program to uncover what you can't find on your own.

MRO, the KLAS-rated #1 provider of Release of Information solutions since 2013, empowers healthcare organizations with proven, enterprise-wide solutions for the secure, compliant and efficient exchange of PHI. MRO's technology-driven services reduce the risk of improper disclosure of PHI, ensure unmatched accuracy and enhance turnaround times.