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MANAGEMENT CONSULTING

Optimizing the business of healthcare

The Service Desk

Increase adoption and leverage IT investments with a well-trained support function.

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No Support? No Adoption.

Electronic health records (EHR) are a far cry from plug and play. Therefore, implementation is not an example of "build it and they will come." In fact, the adoption of EHRs has little to do with technology, and a lot to do with how the organization manages the transition. There are multiple critical success factors; one of the most critical is support. Delays in response time frustrate users and patients. They also negatively affect adoption rates. When implementing an EHR, organizations should pause to review, modify, or develop a support model, beginning with the service desk.

EHR support requests are different than typical "help desk" calls. They are often more related to workflow and process versus solely technical. For example, a physician calls with questions about entering an order. The request is not merely technical; it is related to patient care. The EHR support staff needs to understand the physician's screen flows and workflow. Help desk service agents need to also understand the user's objectives and needs.

Building a Help Desk

The EHR support model should follow the structure and standards set forth in the IT Infrastructure Library (ITIL). ITIL standards set the framework for an IT organization to develop a customer-oriented mindset in a structured manner. These standards and processes allow the IT organization to focus on outcomes and reporting to and for the users. The ITIL is a set of concepts and policies for managing information technology infrastructure, development and operations.

The ITIL also includes event, incident, problem and change management. These elements provide the basis for developing metrics that are used in creating service level agreements (SLAs) with end users. SLAs set the expectations for users and service staff.

Once developed, the support plan needs to be clearly communicated to not only service desk staff, but all users. The plan should explain and illustrate the following processes:

- The process used by technical support staff to provide assistance
- The process used by users to ask for assistance
- The process used by technical support staff for:
    o Event management
    o Incident management
    o Problem management
    o Change management
    o Service level agreements

Graphics are a great way to convey information. They should be easily at hand for users to remind themselves of the process. A graphic can serve as a continuous training tool – less likely to be shelved and more likely to be push-pinned in a cube wall – and makes the help desk function more efficient and effective.

The following graphic representation is an example of a support model. The top describes the call flow, handling and agent processes; the bottom describes the foundation of the support process.
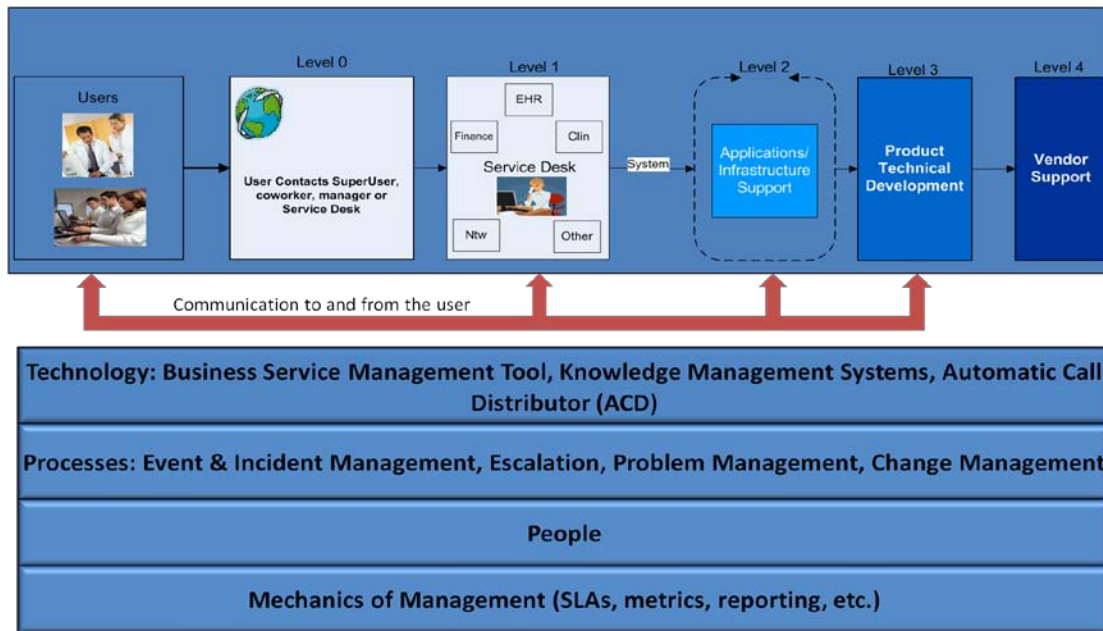

Figure 1

This diagram describes the flow of incidents from problems to resolution and incorporates change management/continuous improvement:
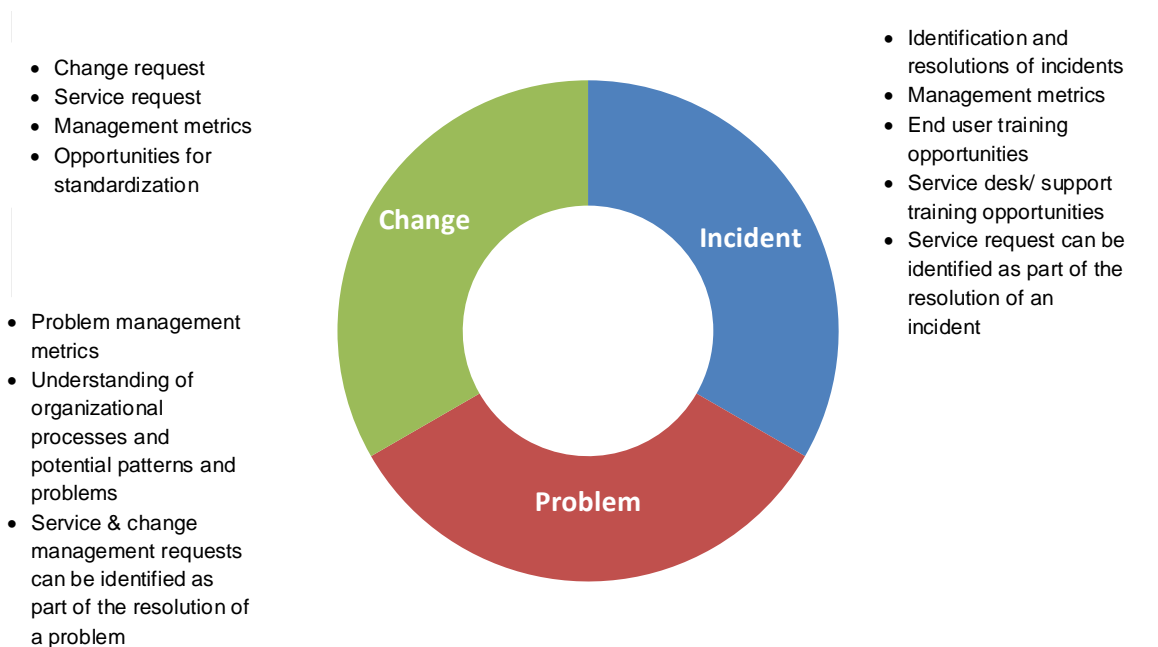
- Change request
- Service request
- Management metrics
- Opportunities for standardization

- Problem management metrics
- Understanding of organizational processes and potential patterns and problems
- Service & change management requests can be identified as part of the resolution of a problem

- Identification and resolutions of incidents
- Management metrics
- End user training opportunities
- Service desk/ support training opportunities
- Service request can be identified as part of the resolution of an incident

Figure 2

3

Top Ten Considerations

When structuring the service desk for EHR support, the following elements are important to consider:

1. **Hiring.** You need to hire the right people for good EHR support. Important qualities to consider are:

    - Good communication skills (verbal and listening)
    - Knowledge of operational/clinical environments
    - Service-oriented (prior work experience)
    - Technically savvy

    You will undoubtedly need more people directly after go-live than you will a year down the road. Therefore, you may want to consider hiring interim resources trained on your EHR system for the first few months, and then scale down to internal staff.

2. **Training.** Thorough and thoughtful training is key to a successful service desk support approach. The following are some suggestions for preparing a well-trained EHR service desk support team:

    - Work with the training team to use existing training material and, when needed, create specific training material for the service desk agents.

    - Integrate trainers and EHR project team members into the support desk on a rotating basis to help with knowledge transfer.

    - Rotate support desk agents through clinics and acute care environments during orientation and periodically thereafter to build knowledge and most importantly, relationships with end users.

    - Post-training reinforcement: Clearly diagram the call handling process including a description of roles and responsibilities at each level of support (as previously illustrated). For example, Level "0" would be local support from a super user, co-worker or manager. Level "1" would be the service/help desk, etc.

3. **Multiple modalities for accessing support**. The service desk should be available 7 days per week, 24 hours a day, 365 days per year. There should be options for obtaining help that correlate to urgency and user preference. Create self-help websites, training websites, self-help password reset, etc. These tools provide options for users, which decrease service desk call volume. In addition, create a voicemail box and email box for users to "drop" non-urgent questions that can be answered within two to four hours.

4. **Service Level Agreement metrics**. All service agents should be aware of the terms in the SLAs and evaluated on the metrics. Therefore, ensure that all agents are clear about the requirements regarding calls abandoned, speed to answer, service levels, first call resolution and other metrics used by your organization.

5. **Super users.** Clearly identify and make clear the role of the super user. Super users are critical to adoption, as they provide training quickly at the right time and the right place.

6. **Knowledge Management System (KMS).** Create scripts that agents can follow to ask appropriate and meaningful questions. Identify workflow scenarios that the agents may use both in training and to support users post-go-live. Tools such as the KMS, BMS Remedy, SalesForce, PeopleSoft, and others can be used to provide the process to track calls and callers, create a call record history, and provide scripts/reference material for agents.

7. **Standardized processes.** Implement standard processes for escalation and the event management. If done properly, these processes will support the reporting required for leadership and users.

8. **Disaster recovery/business continuity plan.** All service desks should have a continuity plan developed to ensure that failover can be performed in a rapid manner. The DRP/BCP should be aligned with your organization's IT plan.

9. **Reporting.** Ensure that appropriate daily, weekly, monthly and yearly reports are created and distributed to designated recipients. Check with leadership on a consistent basis to ensure that the appropriate people receive the right reports. The reports should reflect the processes stated in item #6 and the performance against SLA metrics, i.e. service desk statistics, wait times, call volume, call types, incident/problem management, etc.

10. **Communication planning.** A well-documented communication process should be in place that lets users know about any changes (i.e., new releases, time schedules, etc.), reminds them about procedures and educates them on related support topics.

The ideal support model is based on a strategic partnership between business owners and IT. A feedback loop will allow continuous improvement and responsive adaptation to changing user needs. EHR support should never be an add-on or afterthought, but an integral part of pre-implementation planning. Hiring the right people, integrating support staff with functional areas, etc. will make a huge difference in adoption rates and post go-live user satisfaction.

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* Source: www.KLASresearch.com. *2010 Top 20 Best in KLAS Awards: Software & Professional Services.*