

**12/6/22 – 12/8/22 “ACDIS Online: CDI Symposium for Outpatient Efforts”**

## **CONTINUING EDUCATION CREDIT INFORMATION FOR THE LIVE PROGRAM**

### **Event Learning Objectives**

At the completion of this educational activity, the learner will be able to:

- Define risk-adjustment payment methodologies
- Describe how coding and payment systems differ for outpatient settings
- Explain outpatient documentation workflows
- Identify opportunities for documentation integrity queries within outpatient settings
- Describe physician engagement strategies specific to outpatient documentation integrity efforts

### **Speakers**

- Jessica Rector, MBA (Keynote): Talk show host and founder of the well-being company, Blaze Your Brain, Jessica Rector is on a mission to help others truly live. Blaze Your Brain is the authority on breaking through burnout and tackling your negative thoughts, turning them into outer success and positive action! The team at Blaze Your Brain consults with companies and trains teams to create a culture of well-being, by enhancing mental health and eradicating burnout. They have worked with clients such as Scotiabank, NBCUniversal, the Dallas Mavericks, and Fortune’s #2 “Best Company to work for.” As a #1 best-selling author of 10 books, Rector has shared the stage with Michelle Obama and has been seen on ABC, NBC, CBS, and FOX for creating change. When Rector is not traveling around the world for work, she enjoys learning about the exciting world of Transformers, so she can carry on real conversations with Blaze Your Brain’s CFO, Chief Fun Officer, her nine-year-old son, Blaise, who is also a #1 best-seller author and the youngest published author in the United States.
- Rebecca Hendren is the director of programing for ACDIS, based in Middleton, Massachusetts, where she oversees ACDIS’ strategic direction, member benefits, and educational products and services. In her prior role, she managed revenue cycle live events for ACDIS’ parent company HCPPro, including the annual ACDIS conference, virtual events, seminars, and boot camps. She has also served as associate director for ACDIS and has broad experience as a product director in the CDI, revenue cycle, nursing, patient safety, and accreditation markets. She is a member of the ACDIS Advisory Board and hosts the “Talking CDI” series on the ACDIS Podcast.
- Kim Conner, RN, BSN, CCDS, CCDS-O, is a CDI education specialist for ACDIS at HCPPro, a division of Simplify Compliance LLC, in Middleton, Massachusetts. She serves as a full-time instructor for HCPPro’s CDI Boot Camps and PROPELCDI advisory services. She is a subject matter expert for ACDIS and frequently writes for ACDIS publications and speaks at ACDIS events. Conner has 20 years of clinical experience as a surgical ICU/burn trauma nurse at large academic medical centers. During her career, she has been responsible for initiating CDI programs in both the inpatient and outpatient settings, developing ongoing education across the continuum of care.
- Tami L. McMasters-Gomez, MHL, BS-HIM, CCDS, CDIP, is the director of coding and CDI services at the University of California Medical Center at Davis based in Sacramento, California. She has more than 30 years of experience in HIM, starting her career as a file clerk in the medical records department of a small rural hospital. McMasters-Gomez has worked in a variety of roles, including coder, auditor, supervisor, manager, and director.
- Camille Ruiz, RHIA, is a regulatory specialist for HCPPro and an instructor for HCPPro’s Revenue Integrity and Chargemaster Boot Camp®. She has served as an HIM coder, HIM manager and director, CDM and

revenue integrity manager, and CDM and revenue integrity consultant. She has more than 15 years of experience with revenue systems coordination and CDM and revenue cycle consulting. Ruiz is an AHIMA-Approved Revenue Cycle Trainer.

- Jessica M. Vaughn, DNP, RN, CCDS, CCDS-O, CRC, is director, clinical risk adjustment business operations at Advocate Aurora Health in Rolling Meadows, Illinois. A nurse of 26 years, she has 12 years of CDI experience and joined Advocate Aurora Health in 2022. In 2015, Dr. Vaughn started and led one of the nation's first and ambulatory CDI programs focused on risk adjustment for value-based care and population health for Atrium Health Wake Forest Baptist in North Carolina. She is a leader in the industry, having spoken at multiple conferences, authored articles, and received ACDIS's Professional Achievement Award. Dr. Vaughn helped write the initial CCDS-O certification exam and the original CCDS-O Exam Study Guide.
- Jennifer A. Boles, BS, CPC, CRC, CCDS-O, is ambulatory CDI manager at Baptist Health Medical Group in Louisville, Kentucky. Her coding experience includes primary care, orthopedic, and cardiology. She began working at Baptist Health in 2013 as a specialty coder and transitioned to clinical documentation and coding auditor/educator in 2016. In 2018, she was promoted to the system manager, ambulatory clinical documentation integrity position where she developed the ambulatory CDI department at Baptist Health. She works with and educates coding departments and ACO/CIN/population health departments.
- Denice Hebert, RN, CCDS-O, is an ambulatory CDI specialist at Ochsner Medical Center in Houma, Louisiana. She has served as ambulatory CDI specialist since 2016 overseeing the podiatry and nephrology specialties as well as assisting with primary care providers. Her 31 years of nursing background includes operating room/clinical work in neurosurgery, orthopedics, urology, and general surgery and served as clinic manager overseeing eight specialty clinics.
- Lisa Schmidt, BS, RN, is an ambulatory CDI specialist at Ochsner Medical Center in Houma, Louisiana. She joined Ochsner's clinical documentation excellence team in April 2016. She has 11 years of experience as an oncology nurse and was an oncology certified nurse. She has worked with her department to create guidelines and workflows for the CDE outpatient team. She currently works with several primary care clinics and the hematology/oncology and neurology specialties to educate providers with respect to required documentation and coding.
- Hilary Walters, BSN, RN, is the ambulatory CDI lead at Ochsner Medical Center in Houma, Louisiana. She began working in CDI for the Ochsner Health team in June 2015. She has served as manager of the team since February 2022. Her 23 years of nursing experience include clinical work in the PICU, general pediatrics, NICU, and well-baby nursery.
- David Enevoldsen, CRCR, serves as a director with Optum Advisory Services' Provider Financial Operations and Revenue Cycle Management Practice and has been with the company for over 12 years. Enevoldsen works directly with partner health systems and medical groups to improve their overall revenue cycle performance. In this role, he focuses on revenue cycle process redesign, performance analytics, collections maximization, financial clearance, AR reduction, denials prevention and management, and documentation and coding integrity.
- Reavis Eubanks, MD, is a medical director for Optum Advisory Services. He has 40 years of experience in private practice and four years in consulting including EMR implementation and optimization. Formerly he was a general and pediatric surgeon in private practice in North Carolina.
- Wilson Gabbard, FACHE, is the vice president of quality and clinical risk adjustment for Advocate Aurora Health, where he is responsible for enterprise population health and medical group quality for over 1.3M value-based lives and risk adjustment strategy for over \$3 billion in system risk-based revenue. He co-leads the system's Medicare Advantage (MA) core team that is responsible for driving performance in MA joint ventures, full risk and shared savings contracts. Previously, he spent seven years leading population health operations for UNC Health Care where he was responsible for strategy and operations during its transition from fee-for-service to value-based reimbursement.
- Kenzi A. Brooks, CCDS-O, CCS, COC, CRC, CPC-A, is clinical documentation integrity specialist-outpatient at WVU Medicine, in Morgantown, West Virginia. She is a clinical professional with a coding and clinical documentation background who has experience in implementing a successful outpatient CDI program across an enterprise system.

- Leigh Poland, RHIA, CCS, is vice president of coding services for AGS Health in West Monroe, Louisiana. She has more than 25 years of coding experience and has worked extensively in the coding and education realm over the last 20 years. Her true passion is coding education and making sure coders are equipped to do their job accurately and with excellence.
- Yoon Sin Kim, DO, CCDS, has been a CDI physician lead for the Baylor Scott & White Healthcare System (BSWH) in Texas for the past 5 years. She is aboard certified family medicine physician and adjunct assistant professor at Texas A&M College of Medicine. She did her clinical work in the outpatient setting but spent her first four years with the CDI program focused on growing the inpatient program. In the last year, she has transitioned her CDI role to assist with the outpatient CDI program. Dr. Kim has created numerous educational publications for providers in her hospital system and presented at ACDIS state chapter meetings in Texas and Ohio. She has also been involved in creating lean workflow processes to maximize data driven results and helps manage pilots and implementation of software applications used by the CDI program and providers at BSWH.
- Autumn Reiter, MBA, BSN, RN, CCDS, CCDS-O, CDIP, CCS, is vice president of CDI services for CorroHealth in Plano, Texas. She began her nursing career in ICU, moving into additional bedside experience in labor and delivery, eventually becoming the clinical coordinator for a CDI program in Chesapeake, Virginia. She has been an ACDIS conference presenter, she served as Virginia ACDIS Chapter leader from 2015 to 2016 and was elected to serve on the ACDIS Advisory Board.
- Elizabeth Hylton, CPC, CEMC, is supervisor of CorroHealth's profee auditing department in Plano, Texas. The department is responsible for the auditing and education of multiple clients throughout the United States across multiple specialties. Hylton has nearly 20 years' experience in the coding and auditing arena. Her career began at a small community hospital where she reviewed claims submission errors to reduce denials and increase reimbursement. She has spent several years in the varying administrative roles of physician practices across different specialties, including registration, preauthorization, claims submission, and denial review. She has performed reviews and education for many physicians both regionally at one of the largest healthcare organizations in the Southeast and nationwide.

## Program Agenda

### Day 1: Tuesday, December 6, 2022

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#### Welcome Remarks

11:55 a.m.

#### Keynote

12:00 p.m. – 1:00 p.m.

#### Fire Up So You Don't Burn Out: How to Prevent, Break Through, and Extinguish Burnout (and the Power of Resiliency)

*Jessica Rector, MBA*

Burnout is like a wildfire... spreading quickly and affecting everything in its path. Jessica Rector shares her Burnout Success Formula, the misconceptions with burnout, and easy-to-implement actionable steps to improve motivation, productivity, and mind wellness. She is not just talk; she demonstrates strategies, so you know exactly how to do them (and why they are important). The result: Using Rector's blueprint, you'll end this session feeling more energized, empowered, and resourceful to stifle stress, overcome overwhelm, and break through burnout, which improves performance, engagement, and focus greatly increasing health and wellness, resulting in people who are more productive, able to perform at a higher level, and stay at their organization longer.

#### Live Panel Discussion

1:10 p.m. – 2:00 p.m.

Join outpatient CDI experts *Kim Conner, RN, BSN, CCDS, CCDS-O, Tami McMasters-Gomez, MHL, BS-HIM, CCDS, CDIP*, and *Jessica Vaughn, DNP, RN, CCDS, CCDS-O, CRC*, for a lively discussion moderated by ACDIS Director of Programming Rebecca Hendren. Topics to be discussed include:

- Risk adjustment and problem diagnoses
- Queries and IT tools:
  - 2022 ACDIS/AHIMA Query Practice Brief update
  - What works and what doesn't
- Artificial intelligence (AI) in the outpatient CDI space

### Session

2:10 p.m. – 3:00 p.m.

#### **Ambulatory Adventures in CDI**

*Jennifer Boles, BS, CPC, CRC, CCDS-O*

Follow the five-year long adventure of developing and expanding an ambulatory CDI program, including how to choose staff and which certifications make for a good fit. Boles will cover varied ways to track productivity, examine focus areas, select projects, determine strategies, and identify specialties on which to focus resources.

3:00 p.m. – 3:15 p.m.

### Sponsored Session

### Session

3:30 p.m. – 4:20 p.m.

#### **What's the Risk? Understanding Risk Adjustment Across the Healthcare Continuum**

*Jessica M. Vaughn, DNP, RN, CCDS, CCDS-O, CRC*

Risk adjustment is becoming a popular theme in CDI. But few understand what it is and why it matters. This session will explore the elements and different models of risk adjustment and the importance of using HCC codes to accurately reflect patient care and improve value-based outcomes.

### Live Q&A

4:30 p.m. – 5:00 p.m.

Join the speakers for a live Q&A and submit all your questions from the day's sessions.

## Day 2: Wednesday, December 7, 2022

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### Session

12:00 p.m. – 1:00 p.m.

#### **A Team Approach to Outpatient Denials: CDI and Coding Working Together to Improve Documentation and Reduce Outpatient Denials**

*Kim Conner, RN, BSN, CCDS, CCDS-O, and Camille Ruiz, RHIA*

CDI's role in the outpatient setting has not traditionally included evaluation and management (E/M), but with the increased volume of outpatient denials, E/M leveling and professional billing regulation can no longer be siloed. Collaboration between CDI, professional coders, HIM, and the revenue cycle team is essential in reducing denials. This team approach can uncover:

- Root causes for denials
- Gaps in documentation
- Educational opportunities for providers
- Follow up with progress

This session will examine how collaborative denial prevention promotes accurate claim submission that will result in lower account receivable days and allow for proper payment for services provided.

### Session

1:10 p.m. – 1:55 p.m.

#### **Ambulatory Clinical Documentation Excellence: An Ongoing Process**

*Denice Hebert, RN, CCDS-O, Lisa Schmidt, BS, RN, and Hilary Walters, BSN, RN*

Ochsner's outpatient CDI program is one of the earliest in the country and this session will discuss the highs and lows of getting the program off the ground and where the program is headed in the future. The speakers will cover opportunities for record review, how they educate providers about documentation improvement opportunities related to their medical records, and how they made the case to hospital administrators for CDI program expansion into the outpatient arena and will touch on common problems and strategies for overcoming them.

### Session

2:05 p.m. – 2:55 p.m.

#### **Clinical Risk Adjustment: Ensuring Compliance Through Complete and Accurate Documentation and Coding**

*David Enevoldsen, CRCC, Reavis Eubanks, MD, and Wilson Gabbard, FACHE*

Many health systems are increasing the financial and quality impact of their CDI programs by expanding into outpatient and ambulatory, but CDI in these settings is challenging because it cannot simply replicate inpatient processes. During this session, the speakers will discuss critical success factors and program framework to leverage while developing an ambulatory CDI program—with an emphasis on clinical risk adjustment—while

reviewing case studies that have achieved outsized impacts. It will cover compliance and vulnerabilities that exist in Medicare Advantage, including high-risk and mis-keyed diagnoses as well as OIG targeted audits across the industry.

**3:10 p.m. – 3:20 p.m.**  
**Sponsored Session**

#### Session

**3:30 p.m. – 4:10 p.m.**

#### **Outpatient Query Creation and Compliance**

*Kenzi Brooks, CCDS-O, CCS, COC, CRC, CPC-A*

Join Kenzi Brooks for a look at compliant querying in the outpatient setting and how West Virginia Medicine created a process for writing and communicating compliant queries. Brooks will discuss the difficulties in getting queries to healthcare professionals in the outpatient setting, along with how West Virginia Medical is now able to communicate with providers and track their responses to queries.

#### Live Q&A

**4:20 p.m. – 4:50 p.m.**

Join the speakers for a live Q&A and submit all your questions from the day's sessions.

### **Day 3: Thursday, December 8, 2022**

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#### Session

**12:00 p.m. – 12:45 p.m.**

#### **Does Your Documentation MEET the M.E.A.T. Criteria**

*Leigh Poland, RHIA, CCS*

This case study presentation will walk you through scenarios and share best practices for documenting and coding for chronic conditions. *Coding Guidelines* state that a condition must be present at the time of the encounter, affect patient care or management, and be clearly documented to be coded as a diagnosis. Physicians must accurately document each patient diagnosis and the diagnosis **MUST** be based on clinical medical record documentation from a face-to-face encounter. This means that diagnoses cannot be wholly determined from test results and a patient's past medical history. A well-documented progress note should include the HPI, ROS, physical exam, and show the medical decision-making process. Poland covers how each diagnosis must be documented in an assessment and care plan and each diagnosis must show that the provider is Monitoring, Evaluating, Assessing/Addressing, or Treating the condition.

#### Session

**12:55 p.m. – 1:55 p.m.**

#### **A Physician Advisor Journey from Inpatient to Outpatient CDI: Learned and Advice to Grow Your CDI Physician Advisor Program**

*Yoon Sin Kim, DO, CCDS*

Listen to takeaways from a physician advisor regarding streamlining processes to grow your outpatient CDI program. Find out how Baylor Scott & White Healthcare System uses physician advisors to bridge gaps between various departments and committees in order to develop best practice recommendations for documentation, and the biggest lessons they learned during the process of creating education for key conditions including MIs, malnutrition, pressure injuries, and diabetes.

#### Session

**2:05 p.m. – 2:55 p.m.**

#### **Expanding the Reach of CDI: CDI in the Emergency Room**

*Autumn Reiter, MBA, BSN, RN, CCDS, CCDS-O, CDIP, CCS, and Elizabeth Hylton, CPC, CEMC*

Launching a successful documentation improvement initiative within an emergency department has its challenges, but also many rewards. CDI specialists are being tasked with obtaining clear and accurate documentation in the outpatient arena, including the emergency department. However, CDI programs in the outpatient settings carry a unique set of challenges for the CDI specialists, case managers, and physicians involved. This presentation will review how to build a program, areas of focus, education for CDIs and providers, and key program metrics, as well as overcoming obstacles.

#### Live Q&A

**3:05 p.m. – 3:35 p.m.**

Join the speakers for a live Q&A and submit all your questions from the day's sessions.

## **Credit Types**

### **AAPC**

This program has the prior approval of AAPC for 11 continuing education hours. Granting of prior approval in no way constitutes endorsement by AAPC of the program content or the program sponsor.

### **ACCME**

HCPPro is accredited by the Accreditation Council for Continuing Medical Education (ACCME) to provide continuing medical education for physicians.

HCPPro designates this educational activity for a maximum of 10.75 AMA PRA Category 1 Credits™. Physicians should only claim credit commensurate with the extent of their participation in the activity.

### **ACDIS**

This program has been approved for 10.75 continuing education units towards fulfilling the requirements of the Certified Clinical Documentation Specialist (CCDS and CCDS-O) certification, offered as a service of the Association of Clinical Documentation Integrity Specialists (ACDIS).

### **AHIMA**

This program has been approved for continuing education unit(s) (CEUs) for use in fulfilling the continuing education requirements of the American Health Information Management Association (AHIMA). Granting of Approved CEUs from AHIMA does not constitute endorsement of the program content or its program provider.

### **ANCC**

HCPPro is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation. 11 contact hours for nurses are available for this activity.

### **NAHRI**

This program has been approved for 10.75 continuing education units towards fulfilling the requirements of the Certification in Healthcare Revenue Integrity (CHRI), offered as a service of the National Association of Healthcare Revenue Integrity (NAHRI).

## **Disclosure Statement**

Please note the planners, presenter(s), and contributors to this activity have disclosed no relevant financial relationships with any commercial companies pertaining to this activity.

## How to receive your continuing education certificate

Credits for this program are available for live attendance only. To obtain a continuing education certificate for this program, you must participate in all of the sessions live as they are broadcast over the event dates, December 6-8, 2022, and complete the online evaluation. Partial credit will not be awarded for this program.

To obtain a continuing education certificate, complete the online evaluation by going to:

<https://events.simplifycompliance.com/ACDISOnlineVirtual>

### **Please note:**

The required evaluation will not be activated and available to complete until the entire event concludes on **Thursday, December 8, 2022 at 4:00 p.m. ET**, and you will have 14 days after the live program to complete it in order to receive your certificate. After that date, the evaluation for this activity will be closed.

A certificate will be emailed to you immediately following your evaluation submission. Please retain the email for future reference.

*Note: The automated certificates are sometimes mistaken for spam. We suggest you use a personal email address and check your junk mail folder after completing the evaluation.*

### **Customer Service Contact Information**

If you have questions regarding this product or activity, please contact customer service department for further assistance:

- **HCPPro:** Phone: 800-650-6787 • Email: [customerservice@hcpro.com](mailto:customerservice@hcpro.com)
- **DecisionHealth:** Phone: 855-CALL-DH1 (855-225-5341) • Email: [customer@decisionhealth.com](mailto:customer@decisionhealth.com)