

flourish

CDI IN BLOOM | **acdis 2023**

May 7–8

📍 HYATT REGENCY, CHICAGO, IL

Pre-Conference Program Guide

The Physician Advisor's Role in CDI

Simplify Compliance Event Policies

By registering for and attending a Simplify Compliance event, you are agreeing to the following terms:

Content & Promotional Rights: I agree not to copy or distribute or permit to be copied or distributed, in any form or format, any of the contents of the event materials or attendee profiles without the express written permission of Simplify Compliance. I also agree not to use the event contents for any commercial, marketing, promotional, or political purposes. Simplify Compliance does not permit solicitation by anyone except exhibitors within the area of their booth.

Recording: I understand that Simplify Compliance prohibits me from recording any educational session content, including via social media feeds, unless I have obtained written permission in advance.

Photography: I understand that Simplify Compliance and its contractors record, photograph, and/or stream the various aspects and activities related to its events for both archival and promotional purposes. By attending this event, I give Simplify Compliance and its contractors permission to use my voice and image in any such archival or promotional recording, photograph, or streaming activity without any compensation or credit.

Communications: I provide permission to receive emails, mailings, and faxes related to the Simplify Compliance event. I understand that by choosing to attend the event, I consent to share my business contact information with event sponsors. I understand that sponsors may choose to follow up with me after the event and that I may choose to opt out of communications from each party individually at any time. I understand that both the Simplify Compliance privacy policy, and the privacy policies of the event's sponsors, govern the use of my business contact information.

Respectful Conduct: We expect event participants to behave responsibly and to treat each other—and treat the community—with respect, kindness, and compassion. Simplify Compliance reserves the right, without refund, to revoke the credentials of participants whose conduct is deemed inappropriate, disorderly, or offensive by Simplify Compliance, affiliated third parties, or the local authorities.

Event Programming

Speakers: Views expressed by speakers are their own. Simplify Compliance cannot accept liability for advice given, or views expressed, by any speaker at the event or in any material provided to attendees.

Curriculum: Simplify Compliance aims to provide accurate and up-to-date information, but please be aware that the event's agenda is subject to change. We may not alert registrants to changes in the schedule unless a change has an impact on continuing education units or event start/end times.

Competitors: Simplify Compliance reserves the right to deny event access to registrants who are employed by or represent a company we deem as competitive. In the case of a paid event, we will refund registrants and notify them of the termination of their registration.

Health & Safety

Simplify Compliance and ACDIS/HCPPro place the highest priority on the safety of our guests. To safeguard all those in attendance at our events, we ask that you stay in your room if you are feeling sick, have tested positive for COVID-19, are awaiting the results of a COVID-19 test, or are showing COVID-19 symptoms. Please contact our Customer Service department to talk through options or to move your registration to a future date. Simplify Compliance reserves the right, at its sole discretion, without refund, to expel and deactivate and/or revoke the attendance credentials of participants who violate safety provisions.

Badge Swapping: For security reasons, Simplify Compliance does not permit badge swapping. We will evict from the event, without a refund, anyone found wearing a badge that does not match their identification. In addition, we will cancel the badge/name.

Weapons: Simplify Compliance has a weapons-free policy. We prohibit attending participants from carrying weapons of any kind, including concealed or displayed firearms. We do not permit participants to bring weapons onto the premises of any Simplify Compliance events. Simplify Compliance reserves the right, at its sole discretion, without refund, to expel and deactivate and/or revoke the attendance credentials of participants who violate this weapons-free policy. Participants agree that this policy is in force, and agree to comply with the policy, regardless of whether the event they are attending has posted signs prohibiting weapons.

Agreement

I agree to all the terms and conditions set forth above. I understand that my attendance is voluntary and at my own risk, and I voluntarily accept any and all risks and hazards, including, without limitation, personal injury, illness, or other hazards. I hereby release Simplify Compliance and its officers, employees, partners, contractors, and vendors from any liability related to my attendance. I understand that noncompliance with these rules and policies may result in registration cancellation without refund. Simplify Compliance reserves the right to expel anyone in violation of these rules and policies from the event.

Customer Service Department

If you require additional assistance or have any questions, representatives are available Monday – Friday, 8:00 a.m. – 5:00 p.m. CT. Please call us at 800-650-6787 or email customerservice@hcpro.com.

WiFi Information

Enjoy free WiFi throughout the conference space!

Network name: **Hyatt_Conference**

Password: **ACDIS2023**

Resource Hub

The materials and resources can be found on **The Physician Advisor's Role in CDI** Pre-Conference Resource Hub:

<https://events.simplifycompliance.com/cdi05072023a-resources/>

You can also access all of the materials on our interactive event app. Please see the “Event App Instructions” section of this program guide for more information.

Program Overview

Welcome back to The Physician Advisor's Role in CDI, ACDIS' premier education offering for physician advisors. Choose from two tracks on Day 1. Track 1, Physician Advisor 101: Core Skills and Responsibilities, led by Trey La Charité, MD, FACP, SFHM, CCS, CCDS, breaks down the key responsibilities of the physician advisor, building a strong foundation for those new to the role. Track 2, Expanding and Innovating the Role of the Physician Advisor, is designed for those who have been in the role for some time, featuring intermediate and advanced-level presentations from physician advisors on the forefront of the profession.

The two tracks come together on Day 2 to cover topics such as mortality scores, Hierarchical Condition Categories, clinical validation denials, and more.

Learning Outcomes

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

- Explain the optimal role of the physician advisor in a CDI department
- List key physician advisor metrics that demonstrate return on investment and drive provider engagement
- Describe methods for identifying patients at high risk of mortality
- Explain how peer-to-peer processes reduce denials
- Identify strategies for decreasing DRG denials

Event App Instructions

Use Your Mobile Device

- 1. Download the app:** Access the “App Store” on iOS devices or the “Play Store” on Android.
- 2. Install the app:** Search for **Webex Events**. Once you’ve found the app, tap either “Get” or “Install.” After installing, a new icon will appear on the home screen.
- 3. Sign in:** Once downloaded, open the Webex Events app and enter the email address you used to register for the event.
- 4. Create a password:** Create your own password and tap “Sign Up.” Review your profile information and tap “Continue.”
- 5. Join the event:** On the next page, you will see a listing of the app events you have access to. Tap **2023 ACDIS Conference** from the list to enter the app.



Use Your Computer

- 1. Go to the website:**
<https://app.socio.events/MjIwNzI%3D>.
- 2. Enter your information:** Enter the email address used to register for the event, then click “Continue.” Create your own password and click “Sign Up.”
- 3. Join the event:** Review your profile information and click “Continue” to enter the web version of the app.

If you are experiencing any technical difficulties with the app, please email virtualappsupport@blr.com with the subject line **ACDIS Conference App Assistance** or contact customer service at **800-650-6787**.

If you are currently at the event, please visit the registration desk and ask a team member for assistance.



Continuing Education Information

Obtain your CEUs online

In order to receive your continuing education certificate for this program, you must complete the online evaluation below within two weeks of the event:

<https://events.simplifycompliance.com/physicianpre23/eval>

Please note that the evaluation will not be activated and available to complete until the event concludes on **Monday, May 8 at 4:00 p.m. CT.**

Your certificate will be emailed to you upon successful completion and submission of the evaluation. Please check your junk or spam mail folder if you do not receive your certificate soon after submission.

Accreditation Council for Continuing Medical Education (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 12.25 *AMA PRA Category 1 Credits*[™].

Physicians should only claim credit commensurate with the extent of their participation in the activity.

American Health Information Management Association (AHIMA)

This program has been approved for up to 12 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.

Association of Clinical Documentation Integrity Specialists (ACDIS)

This program has been approved for 12.25 continuing education units towards fulfilling the requirements of the Certified Clinical Documentation Specialist (CCDS) certification and CCDS-O (outpatient) certification, offered as a service of the Association of Clinical Documentation Integrity Specialists (ACDIS).

National Association of Healthcare Revenue Integrity (NAHRI)

This program has been approved for 12.25 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.

Speakers

Note: Speakers subject to change.



Carrie Alme, MD, is a physician advisor for Froedtert Hospital in Milwaukee and an assistant professor at the Medical College of Wisconsin. She has been a physician advisor for eight years, focusing on utilization review and denials. She continues her 15 years as a hospitalist specializing in advanced heart failure and enjoys advocating for patients.



Kory Anderson, MD, CHCQM, FACP, is the medical director for Intermountain Healthcare's physician advisor services (IPAS) and CDI team. He also functions as the interim quality medical director. His accountability in these roles includes physician utilization review, CDI, physician education, denials and appeals work, and quality oversight. Anderson has worked at Intermountain Healthcare for 14 years and continues to practice as a hospitalist at one of Intermountain's trauma facilities. He has been involved with the IPAS program since 2012, helping build the program to its current state of 30 physicians and 45 nurses.



Wendy Arafles, MD, FAAP, has been a practicing pediatric hospitalist at Phoenix Children's Hospital for over 15 years with a specific interest in children with medical complexity and technology dependence. She has also filled the role of medical director of the CDI program since 2018. In her dual roles, she intertwines skills in medical education, innovations in quality improvement for children with medical complexity, and foundational understanding of hospital finance. Her goals are to optimize the institution's ability to describe the complexity of the patient population and develop high-value programs in patient and family service. Arafles has presented on CDI and medical complexity topics at several national conferences, and she is an active member of the Pediatric Documentation Research Collaborative, a research group that focuses on documentation-related issues in pediatric hospitals.



Julie Kolinski, MD, is a physician advisor for Froedtert Hospital in Milwaukee and an associate professor at the Medical College of Wisconsin. She practices as an internal medicine and pediatric hospitalist. As a physician advisor, she helps oversee utilization management, denials, and CDI. In 2021, she became the enterprise associate chief quality and patient safety officer, focusing on patient safety and the mortality review process, clinical standardization/stewardship, and transitions of care.



Trey La Charité, MD, FACP, SFHM, CCS, CCDS, is the medical director for CDI and coding at the University of Tennessee Medical Center (UTMC) in Knoxville, Tennessee. He has written four books in the field of CDI that address physician advisor training, program management, and Recovery Auditor appeals. He is a practicing hospitalist, a clinical assistant professor in the department of medicine, and the curriculum director of the residency program's hospitalist rotation. He also has responsibilities in performance improvement, quality, utilization review, case management, compliance, and payer contract negotiation. He is a past ACDIS Advisory Board member and a regular presenter at the ACDIS physician advisor pre-conference and the annual ACDIS national conference.



Takiko May, MD, CHCQM, FACP, is a practicing hospitalist with 20 years' experience and is currently a part-time nocturnist at Logan Regional Hospital in Logan, Utah. She joined the Intermountain physician advisor services team as a CDI physician educator in 2015 and currently leads the education team of 10 physicians in the Canyons region of Intermountain Healthcare, supporting documentation education needs for physicians and APPs in 24 hospitals. This work dovetails with her concurrent work in appeals and denials, as accurate documentation is critical in reducing medical necessity denials. She is passionate about creating an accurate patient record that reflects the acuity of the individual's health.



Purvi K. Shah, MD, is a primary care internist and medical director of population health—complexity capture and post-acute care at NorthShore University Health System in Evanston, Illinois. Her focus is on attaining complete and accurate documentation in the ambulatory setting and improving transitions across the continuum of patient care. She is passionate about improving quality without increasing clinician workload. She is a member of the ACPA CDI Committee and ACDIS Leadership Council. She attended Vanderbilt University School of Medicine and completed her internal medicine residency at Northwestern University prior to joining the professional staff at NorthShore University Health System in 2009.



Deepa Velayadikot, MD, CHCQM-PHYADV, is the medical director of care coordination and the medical director of hospital medicine for Cooper University Hospital, which is the leading academic health system and only Level I trauma center in South Jersey. She is also an assistant professor of clinical medicine at Cooper Medical School of Rowan University and director of educational programs including the Care Coordination Clerkship and Utilization Management and Observation Services elective. Velayadikot is board-certified in internal medicine and is a hospitalist and physician advisor. She oversees the Cooper Physician Advisor Program, which she both developed and expanded.

Agenda and speakers subject to change. All times listed per event location.

Agenda | Day 1

Sunday, May 7, 2023

7:00 a.m.–
8:00 a.m.

REGISTRATION (*Randolph Meeting Room Foyer*) and
NETWORKING CONTINENTAL BREAKFAST (*Randolph Pre-Function*)

CHOOSE YOUR TRACK FOR THE DURATION OF DAY 1

■ **Track 1 / Physician Advisor 101: Core Skills and Responsibilities**

■ **Track 2 / Expanding and Innovating the Role of the Physician Advisor**

8:00 a.m.–
9:10 a.m.

MEDICAL STAFF BUY-IN (*Randolph 1AB*)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- How to explain the goals of your CDI program
- What your providers don't know about their documentation and their publicly reported performance data
- What your providers don't know about your facility
- How to explain why CDI is crucial for your providers' future and their facility

FROM NAY TO YAY: WINNING DENIALS AND INCREASING REVENUE USING CUSTOM CDI AND PEER-TO-PEER PROCESS (*Randolph 2*)

Kory Anderson, MD, CHCQM-PHYADV, FACP, and Takiko May, MD, CHCQM, FACP

- Who is denying you, how often, and why?
- Build a foundation of success through relationships and payer contracting involvement
- Set up a multifunctional team to close the loop on all reviews, and use technology to automate portions of the process

9:20 a.m.–
10:25 a.m.

READY, SET, INTERVENE! MANAGING PROBLEMS, PITFALLS, AND PERSONALITY DISORDERS (*Randolph 1AB*)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- Understanding the obstacles that you and your program will face
- 10 rules for ensuring CDI program success
- Strategies to improve medical staff compliance
- Practical suggestions for that difficult provider conversation

PHYSICIAN ADVISOR PROGRAM: DASHBOARD, METRICS, AND WORKFLOWS

(*Randolph 2*)

Deepa Velayadikot, MD, CHCQM-PHYADV

- Develop a formal structured physician advisor program
- Define and create a physician advisor dashboard and metrics
- Optimize physician advisor workflows in EHR

10:25 a.m.–
10:45 a.m.

NETWORKING AND REFRESHMENTS BREAK (*Randolph Pre-Function*)

10:45 a.m.–
11:45 a.m.

WHAT SHOULD I BE PUTTING IN THE CHART? (Randolph 1A)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- Review the basic documentation practices every provider should routinely employ
- Review best practices for operative note construction
- Helpful documentation practices to ensure medical necessity and correct hospital status determinations
- Learn strategies to encourage provider adoption of new documentation habits

PSQ & HRC: ALIGNING PATIENT SAFETY AND QUALITY WITH THE HOSPITAL REVENUE CYCLE (Randolph 2)

Wendy Arafiles, MD, FAAP

- Understand how siloed processes can lead to mixed messaging to providers, as goals of the patient safety and quality (PSQ) and hospital revenue cycle (HRC) departments can sometimes be contradictory
- Combine knowledge of hospital finance with experience in day-to-day operations of patient care to create shared strategies that may meet PSQ and HRC goals more efficiently

11:45 a.m.–
1:00 p.m.

NETWORKING LUNCH—PROVIDED (Randolph 3)

1:00 p.m.–
2:00 p.m.

STAY WITHIN THE LINES! HOW TO CONDUCT A COMPLIANT CDI PROGRAM

(Randolph 1A)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- Understand CMS' "Double Jeopardy" for hospitals
- 10 rules to stay on the straight and narrow
- Review acceptable CDI query construction practices
- Review when provider queries are needed

CATCH THEM YOUNG AND WATCH THEM GROW! (Randolph 2)

Deepa Velayadikot, MD, CHCQM-PHYADV

- Innovative strategies for provider education
- The power of early education to engage our new generation (medical students, residents, and fellows)
- Understand the "why"

2:10 p.m.–
3:10 p.m.

STOP, DROP, AND ROLL! MANAGING THE UNEXPECTED FIRES (Randolph 1A)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- The impact of your CDI program on other hospital departments and how to manage those issues
- Review EMR-specific risks for your CDI program
- Understand why your facility is a Recovery Auditor target
- Learn specific Recovery Auditor tactics employed to issue denials to your facility
- Handling other unanticipated problems in CDI

DRIVE OUTCOMES AND DOLLAR CAPTURE WITH AN EFFECTIVE IN-HOUSE CDI PHYSICIAN AND APP EDUCATION PROGRAM (Randolph 2)

Kory Anderson, MD, CHCQM-PHYADV, FACP, and Takiko May, MD, CHCQM, FACP

- Determine what data tells us about quality, safety, and financial outcomes
- Identify key stakeholders to partner with and leverage physician-to-physician relationships to foster buy-in and engagement
- Lay the foundation with who, what, why, and how clinicians impact critical metrics
- Measure the financial and quality impact and close the loop with leaders and physicians/APPs

3:10 p.m.–
3:30 p.m.

NETWORKING & REFRESHMENTS BREAK (*Randolph Pre-Function*)

3:30 p.m.–
4:30 p.m.

PRACTICAL CONSIDERATIONS: CDI TEAM STRUCTURE AND PA POSITION DEVELOPMENT (*Randolph 1AB*)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

- Suggestions for getting a CDI team assembled, organized, and up to speed
- Review successful CDI physician advisor characteristics
- Who should be your CDI program’s physician advisor?
- The other roles of the active and involved CDI physician advisor
- Review potential physician advisor time requirements and how to get paid

THE PHYSICIAN ADVISOR PERSPECTIVE: GUIDING CDI TO EXPAND IMPACT

(*Randolph 2*)

Julie Kolinski, MD

- Develop clear goals for a CDI program that are not limited to financial capture
- Master strategies for prioritizing cases to review and developing a quality query metric
- Empower a group of decision-makers when conflicts arise between CDI, coding, and physician advisor perspectives

4:30 p.m.–
5:00 p.m.

Q&A SESSION (*Randolph 1AB*)

Trey La Charité, MD, FACP, SFHM, CCS, CCDS

TRACK 2 ADJOURNS AT 4:30 P.M.

5:00 p.m.

DAY 1 CONCLUDES

Agenda | Day 2

Monday, May 8, 2023

7:00 a.m.–
8:00 a.m.

NETWORKING CONTINENTAL BREAKFAST (*Randolph Pre-Function*)

SESSIONS FOR DAY 2 ARE ALL JOINT, GENERAL SESSIONS.

8:00 a.m.–
9:00 a.m.

LEVERAGE TECHNOLOGY TO IMPROVE MORTALITY SCORES AND PROVIDE BEST-IN-CLASS END-OF-LIFE CARE (*Randolph 1AB*)

Kory Anderson, MD, CHCQM-PHYADV, FACP, and Takiko May, MD, CHCQM, FACP

- Review relevant data and describe an algorithm to identify where opportunities lie in the observed vs. expected
- Share data findings and tactics for improvement with key stakeholders
- Lay the foundation for improvement through physician and APP education and engagement
- Use NLU/NLP technology to improve clinical documentation and identify patients who may be at end of life

<p>9:10 a.m.– 10:10 a.m.</p>	<p>THE 123s OF HCCs (<i>Randolph 1AB</i>) <i>Purvi K. Shah, MD</i></p> <ul style="list-style-type: none"> • Define Hierarchical Condition Categories (HCC) and provide examples of common HCC diagnoses • Describe the role of HCCs and the risk adjustment factor (RAF) in risk-based contracting and value-based care as well as their impact on fee-for-service payers • Understand how to compliantly capture an HCC through MEAT criteria • Articulate the impact of complete and accurate HCC documentation on reimbursement
<p>10:10 a.m.– 10:30 a.m.</p>	<p>NETWORKING & REFRESHMENTS BREAK (<i>Randolph Pre-Function</i>)</p>
<p>10:30 a.m.– 11:30 a.m.</p>	<p>CLINICAL VALIDATION DENIALS: HOW TO PLAY AND WIN THE GAME (<i>Randolph 1AB</i>) <i>Carrie Alme, MD</i></p> <ul style="list-style-type: none"> • Explore how clinical validation denials are an increasing foe for physician advisors and hospital systems • Discuss strategies for short-term and long-term success using both common and novel approaches
<p>11:30 a.m.– 12:45 p.m.</p>	<p>NETWORKING LUNCH—PROVIDED (<i>Randolph 3</i>)</p>
<p>12:45 p.m.– 2:45 p.m.</p>	<p>OPTIMIZING HOSPITAL PERFORMANCE DATA: SMALL GROUP EXERCISE IN MORTALITY REVIEWS (<i>Randolph 1AB</i>) <i>Trey La Charité, MD, FACP, SFHM, CCS, CCDS</i></p> <ul style="list-style-type: none"> • How to successfully implement a mortality review process at your organization • Understand the expected and unexpected results of creating a mortality review process • Engage in small group reviews of actual mortality cases for improved diagnosis capture and documentation revision opportunities • Understand when discovered documentation opportunities should or should not be added to a mortality record
<p>2:45 p.m.– 3:00 p.m.</p>	<p>NETWORKING & REFRESHMENTS BREAK (<i>Randolph Pre-Function</i>)</p>
<p>3:00 p.m.– 4:00 p.m.</p>	<p>HOW TO GET THE C-SUITE TO WORK FOR YOU (<i>Randolph 1AB</i>) <i>Carrie Alme, MD, and Julie Kolinski, MD</i></p> <ul style="list-style-type: none"> • Display how to meaningfully translate the work of utilization review to leadership to guide focus • Highlight how to create business proposals that allow for CDI expansion over time • Aim high! Discuss how, through internal processes and data tracking, you can work on the ultimate goal of contract improvements
<p>4:00 p.m.</p>	<p>PRE-CONFERENCE CONCLUDES</p>

Please note that if you are attending the ACDIS conference, the exhibit hall grand opening and welcome reception begins at 4:00 p.m. in the Riverside Center.

Putting **knowledge** to work



HCPro, a division of Simplify Compliance LLC, has over 35 years of experience providing specialized solutions for every stage of the revenue cycle from clinical documentation, coding, and compliance to reimbursement, billing, denials, and more. Our publications, continuing education, online coding platforms, instructor-led training, events, consulting services, and more help organizations deliver consistent training, achieve compliance, and maximize workflow efficiencies, resulting in measurable performance and financial improvements.

Visit: hcpro.com **Online store:** hcmarketplace.com

Affiliated Associations: acdis.org | nahri.org



DecisionHealth is the industry's leading source for home health agencies and medical practice facilities to receive the latest news, analysis, and regulatory guidance on Medicare coding and reimbursement, benchmarks, payments, and HIPAA compliance.

Visit: decisionhealth.com

Online store: store.decisionhealth.com | codingbooks.com

Affiliated Association: ahcc.decisionhealth.com



HealthLeaders is a multi-platform media company dedicated to meeting the business information and leadership needs of healthcare executives and professionals. We offer over a dozen topical e-newsletters, a magazine, events, and more. **Visit:** healthleadersmedia.com

Other Markets We Serve:

HR, EHS, and Legal

blr.com

hci.org

Telecommunications

ccmi.com

datacenterhawk.com

Leadership Development

bluepointleadership.com

Professional Development

events.simplifycompliance.com

Solutions we offer include:



Books & Publications



Webinars & eLearning



Conferences & Roundtables



Newsletters & Subscriptions



Continuing Education & Certifications



Custom Training



Boot Camps



Leadership Development

5511 Virginia Way, Suite 150, Brentwood, TN 37027

Phone: 800-650-6787 **Email:** customerservice@hcpro.com