



accdis
SYMPOSIUM
OUTPATIENT CDI
MAY 7–8, 2023

HYATT REGENCY CHICAGO
CHICAGO, IL

PROGRAM GUIDE

acdis.org

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.

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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.

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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 **2023 ACDIS Symposium: Outpatient CDI** Resource Hub:

<https://events.simplifycompliance.com/cdi05072023b-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

The *ACDIS Symposium: Outpatient CDI* is focused exclusively on CDI efforts in the outpatient and ambulatory setting and features innovative sessions and dynamic speakers you won't find anywhere else. Dedicated to the fastest-growing area of CDI, the next two days will include diverse sessions for both managers/leaders and clinical chart reviewers, including how to get started in the ambulatory setting, query techniques and nuances, metrics and analytics, staff training, and demonstrating return on investment. Plus, take advantage of the many networking opportunities to connect with and learn from your peers! Smaller and more intimate than the annual ACDIS conference, the *ACDIS Symposium: Outpatient CDI* is the perfect place to ask your questions about outpatient CDI, listen to case studies from organizations with successful programs, and equip yourself with practical resources and information that you can implement immediately.

Learning Outcomes

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

- Describe two strategies for starting or improving an outpatient CDI program
- Evaluate best practices for reviewing outpatient documentation
- Identify three compliance risks in the query process as well as practical steps for avoiding them
- Apply principles of outpatient CDI to physician education
- Describe important CDI data to track in order to demonstrate program progress and return on investment

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 click “Sign Up.” Review your profile information and click “Continue.”
5. **Join the event:** On the next page, you will see a listing of the app events you have access to. Click on **2023 ACDIS Symposium: Outpatient CDI** from the list to enter the app.



Use Your Computer

1. **Go to the website:** <https://app.socio.events/MjlyNTc%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 Symposium 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 at the link below within two weeks of the program:

<https://events.simplifycompliance.com/opcdi23>

Please note that the evaluation will not be activated and available to complete until the event concludes on **Monday, May 8 at 3:00 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.

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.

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 *11 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 11 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.

American Nurses Credentialing Center (ANCC)

HCPPro is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center's Commission on Accreditation.

This educational activity for 11 nursing contact hours is provided by HCPPro.

Association of Clinical Documentation Integrity Specialists (ACDIS)

This program has been approved for 11 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 11 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.

Keynote Speaker



Denise Ryan, MBA, CSP, is a Raleigh, North Carolina–based professional speaker and a motivational pyromaniac. Her infectious energy and enthusiasm will set a room ablaze. A magna cum laude graduate of the University of South Carolina with a master’s degree in business, what she really specializes in is lighting fires. After earning millions for clients in the corporate world, Denise realized she had a talent for firing people up. She parlayed this gift into FireStar, a company specializing in enthusiasm. Eleven years later, Denise motivates and energizes large corporations and small businesses across America at conferences, board retreats, and annual meetings. Her no-nonsense, direct delivery coupled with her astute business savvy and irreverent wit leave audiences not only laughing, but with actionable tips. Not your typical “motivational speaker,” Denise is genuine and real, but also highly skilled—she holds the title of Certified Speaking Professional (CSP), a designation awarded to fewer than 10% of professional speakers. Denise is an author, a keynote speaker, and most notably a firestarter extraordinaire. FireStar’s unique programs are relevant, uplifting, and informative. Denise’s trademark interactive programs address myriad workplace issues such as dealing with change, getting along with others, staying motivated, and the secrets of successful selling. She also offers customized training sessions. Denise’s infectious enthusiasm motivates the unmotivated and challenges the challenged. Consider yourself warned: FireStar programs are five-alarm scorchers.

Session Speakers



Charles R. (Reggie) Ahlfield, MBA-HA, BSHI, RN-BC, is a clinical documentation specialist for UC Davis Health in the outpatient clinical setting. He has over 20 years of experience in healthcare, informatics, and data analytics. He has worked in intensive care, emergency care, and other areas as a bedside nurse. In addition, he has worked as a clinical informaticist and program trainer for Lompoc Valley Medical Center, as a manager of informatics, and as a director of nursing in clinical excellence and informatics for Tenet Healthcare.



Jennifer A. Boles, BS, CPC, CRC, CCDS-O, is system manager of ambulatory CDI at Baptist Health System in Louisville, Kentucky, where she developed a program to serve the system’s more than 300 locations, nine hospitals, and over 1,500 employed providers. She provides education and training to support service line/quality measurements for risk adjustment and documentation improvement. Her coding experience includes primary care, orthopedics, and cardiology. Boles presented at Healthcare Business Insights and at the 2018 and 2019 ACDIS Symposium: Outpatient CDI events. She served on the 2019/2020 ACDIS Leadership Council and is a published writer for ACDIS’ *CDI Journal* and AHIMA. She has also been a guest instructor for physician assistants at Sullivan University.



Loretta Broadnax, MSW, has over 25 years of experience in health and human services, specifically in child welfare social work, working in administration and leadership management. She started in CDI/population health in 2018 and has been with UC Davis HIM since 2020. Currently, she supervises the outpatient CDI team.



Jared Brock, MBA, is the system director of CDI analytics at Baylor Scott & White Health in Dallas, Texas. He oversees the collection, aggregation, and reporting of all data related to the inpatient and outpatient CDI programs. The type of reporting produced by his team ranges from actionable data tailored for clinic managers all the way to executive reporting distributed to the C-suite. Prior to his current role, he spent time in supply chain analytics, perioperative analytics, and research finance.



Kim Conner, RN, BSN, CCDS, CCDS-O, is CDI director at South Shore Health in Weymouth, Massachusetts. She has over 17 years of bedside nursing experience and eight years of CDI experience. Under her leadership, South Shore Health has transformed its CDI program, improving collaboration with clinicians and coders, redesigning processes for greater efficiency, and instituting performance measures that demonstrate the value of CDI to South Shore's overall success.



Gregory L. Davis, MHIIM, RN-BC, CCDS, CCDS-O, RHIA, CCS, CDIP, CAHIMS, combines 26 years of healthcare knowledge in bedside nursing, healthcare informatics, and HIM in his role as manager of healthcare risk and compliance at Protiviti. He has previously served in leadership roles in nursing, inpatient coding, and CDI. He also works as an adjunct professor for the CAHIIM-accredited Bachelor of HIM program at William Carey University.



Wilson Gabbard, FACHE, is the vice president of clinical risk adjustment for Advocate Aurora Health in Barrington, Illinois. He received his Bachelor and Master of Business Administration degrees from Morehead State University and is a Fellow of the American College of Healthcare Executives (FACHE).



Colleen Gianatasio, MHS, CPC, CPCO, CRC, CDEO, CPC-P, CPMA, CPPM, CCS, CCDS-O, is director of CDI and coding compliance for Capital District Physician's Health Plan. She has 20 years of experience in the health insurance field. Her responsibilities are provider engagement and clinical documentation improvement for accurate coding and reimbursement. She specializes in developing innovative coding curricula and instruction to support compliance with federal guidelines and appropriate reimbursement processes. She serves as president of the AAPC National Advisory Board.



Sarah J. Hartley, MHA, RHIA, CDEO, CRC, is director of ambulatory risk adjustment and CDI at NorthShore University Health System in Evanston, Illinois. She has been in healthcare for 21 years and has spent 16 of those years in leadership positions. In her role as HIM director and director of CDI (both inpatient and ambulatory), she has forged successful relationships with providers at all levels, obtaining buy-in, support, and collaboration to make improvements.



Carrie Ann Horn, MSHA, BBA, RN, CCDS, CCDS-O, CRC, CPC, CHFP, CRCR, is director of outpatient CDI at Baylor Scott & White Health (BSWH) in Dallas, Texas. She has 25 years of nursing experience, 13 of those spent in CDI leading high-quality, cost-effective, standardized process improvements across inpatient and ambulatory operations. Prior to joining BSWH, she spent seven years building and transforming outpatient CDI and provider CDI education at a large integrated academic medical center. She has expertise in developing, monitoring, and auditing compliant inpatient and outpatient CDI infrastructure, risk adjustment, provider coding education, clinical denials, and post-payment audits.



Jason Jobes, BA, MSPA, is the senior vice president of consulting for Norwood, where he oversees all consulting partnerships and delivery for Norwood's healthcare partners. These partnerships focus on creating economic sustainability for the healthcare ecosystem through improved performance across the revenue cycle and value-based care terrains. Jobes holds a Bachelor of Arts from University of Hawai'i Hilo, where he graduated with a degree in economics with a minor in business administration. He also obtained his Master of Science in Predictive Analytics from Northwestern University in Evanston, Illinois.



Shannon E. McCall, RHIA, CCS, CCS-P, CPC, CPC-I, CEMC, CRC, CCDS, CCDS-O, is the director of coding and HIM for HCPro, a Simplify Compliance company, based in Brentwood, Tennessee. She is the developer of the Certified Coder Boot Camp®—Inpatient Version and the Evaluation and Management Boot Camp® and also collaborated with the CDI team to develop the Risk Adjustment Documentation and Coding Boot Camp®. As a consultant for HCPro, she works with all types of healthcare providers on a wide range of coding-related issues with a particular focus on education. McCall has extensive experience with coding for both physician and hospital services.



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. She is an AHIMA-certified ICD-10-CM/PCS trainer.



Kim Pardini-Kiely, RN, MS, is Protiviti's clinical and operational excellence lead and the Pacific Northwest healthcare practice lead. She has a track record of aligning services to achieve strategic goals. Focusing on results, she has implemented management systems that improve organizational performance by creating strategic road maps, setting concrete goals, putting efficient processes in place, and monitoring performance to sustain results. Pardini-Kiely develops transformational organizational strategies that are relevant, contemporary, innovative, and tailored to improve cost, quality, and service.



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 improving 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.



Jessica M. Vaughn, DNP, RN, CCDS, CCDS-O, CRC, is director of 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 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' Professional Achievement Award. Dr. Vaughn helped write the initial CCDS-O certification exam and the original *CCDS-O Exam Study Guide*.

Agenda

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

Day 1

Sunday, May 7, 2023

7:00 a.m.–8:00 a.m.

Registration (Plaza Ballroom Foyer) & Networking Continental Breakfast—Exhibit Hall Opens (Plaza Ballroom AB)

8:00 a.m.–8:10 a.m.

Opening Remarks (Michigan 1ABC)

Laurie L. Prescott, RN, MSN, CCDS, CCDS-O, CDIP, CRC, interim director, ACDIS

8:15 a.m.–9:15 a.m.

Keynote: Keeping the Flame: How to Stay Motivated No Matter What (Michigan 1ABC)

Denise Ryan, MBA, CSP

One of the greatest challenges we all face is keeping ourselves motivated. This is particularly difficult and extremely important with our fast-paced, high-responsibility jobs. It's easy to lose enthusiasm and get burned out, stressed out, and finally—checked out. This high-energy session will give attendees six steps for getting the fire back in their lives professionally and personally. It's not just a motivational speech; it's a method attendees can apply long after the speech.

9:25 a.m.–10:25 a.m.

Building a Successful Outpatient Program: Steps for Success (Michigan 1ABC)

Jennifer A. Boles, BS, CPC, CRC, CCDS-O

Follow the five-year 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.

10:25 a.m.–10:45 a.m.

Networking, Refreshments, & Exhibits Break (Plaza Ballroom AB)

10:45 a.m.–11:45 a.m.

The Art and the Science of Outpatient Query Compliance (Michigan 1ABC)

Kim Conner, RN, BSN, CCDS, CCDS-O

Compliant query writing in the outpatient setting is a learned skill that is both an art and a science. Join Kim Conner for a look at best practices for querying in the outpatient setting, including a review of the 2022 ACDIS/AHIMA *Guidelines for Achieving a Compliant Query Practice*.

11:45 a.m.–12:30 p.m.

Networking Lunch—Provided (BIG Bar Restaurant)

12:30 p.m.–1:00 p.m.

Networking Dessert & Exhibits (Plaza Ballroom AB)

1:00 p.m.–2:00 p.m.

The Importance of Risk Adjustment in Value-Based Care Contracts (Michigan 1ABC)

Jason Jobes, BA, MSPA

In this session, attendees will get a refresher on the risk- and value-based landscape while learning tactical things they can do to succeed in risk adjustment. In a world where information and patient complexity are communicated via codes, it is more important than ever to have an accurate depiction of the population. With continued shifts from volume- to value-based care, organizations are learning that they must control the cost of care while ensuring patient complexity is accurately shown. Failure to do this represents an imbalance in actual vs. expected cost of care and could jeopardize an organization's success in value-based contracts.

Agenda

Day 1

2:10 p.m.–3:10 p.m.

Sunday, May 7, 2023

How to Set Up a Successful Outpatient CDI Program (Michigan 1ABC)

Colleen Gianatasio, MHS, CPC, CPCO, CRC, CDEO, CPC-P, CPMA, CPPM, CCS, CCDS-O

This interactive session will discuss how to set up a successful outpatient CDI program, including how to staff your team, provider engagement strategies, and how to measure and report on the success of your program.

3:10 p.m.–3:30 p.m.

Networking, Refreshments, & Exhibits Break (Plaza Ballroom AB)

3:30 p.m.–4:30 p.m.

Effective and Compliant Hierarchical Condition Category Auditing (Michigan 1ABC)

Gregory L. Davis, MHIIM, RN-BC, CCDS, CCDS-O, RHIA, CCS, CDIP, CAHIMS, and Kim Pardini-Kiely, RN, MS

This session will define and help attendees understand risk adjustment and why accurate Hierarchical Condition Category (HCC) capture is important. By the end of the session, attendees should understand how to measure risk adjustment and HCC program performance.

4:30 p.m.–5:30 p.m.

Networking Reception (Plaza Ballroom AB)

5:30 p.m.

Day 1 Concludes

Day 2

7:00 a.m.–8:00 a.m.

Monday, May 8, 2023

Networking Continental Breakfast in the Exhibit Hall (Plaza Ballroom AB)

8:00 a.m.–9:00 a.m.

Risk Adjustment and CDI Through a Population Health Lens (Michigan 1ABC)

Wilson Gabbard, FACHE, and Jessica M. Vaughn, DNP, RN, CCDS, CCDS-O, CRC

At Advocate Aurora, risk adjustment is viewed as a core tenet of the population health strategy, where interdisciplinary teams work collaboratively to improve documentation integrity and patient engagement across the enterprise. During this session, population health leaders from Advocate Aurora will share how they developed a broad, multipronged approach to risk adjustment to address the critical needs of value-based care. This session will help participants understand and identify potential approaches for a layered design across a matrixed healthcare system.

Agenda

Day 2

Monday, May 8, 2023

9:10 a.m.–10:10 a.m.

Establishing a Gold Standard Outpatient CDI Program Through Analytics and AI/Technology (Michigan 1ABC)

Charles “Reggie” Ahlfield, MBA-HA, BSHI, RN-BC; Loretta Broadnax, MSW; and Tami L. McMasters-Gomez, MHL, BS-HIM, CCDS, CDIP

This session will discuss the evolution of outpatient CDI at the University of California Medical Center at Davis. The speakers will cover the adoption and implementation of Hierarchical Condition Category management, including AI-powered queries, on-demand provider notification, contextual awareness, and evidence-based reasoning.

10:10 a.m.–10:30 a.m.

Networking, Refreshments, & Exhibits Break (Plaza Ballroom AB)

10:30 a.m.–11:30 a.m.

Transforming Your Outpatient CDI Program Through an Evaluation of People, Process, and Technology (Michigan 1ABC)

Jared Brock, MBA, and Carrie Ann Horn, MSHA, BBA, RN, CCDS, CCDS-O, CRC, CPC, CHFP, CRCR

In this session, learn how Baylor Scott & White Health has transformed their outpatient CDI program through an evaluation of people, processes, and technology to support expansion beyond the primary care office, all while engaging key stakeholders to support system performance.

11:30 a.m.–12:15 p.m.

Networking Lunch—Provided (BIG Bar Restaurant)

12:15 p.m.–12:45 p.m.

Networking Dessert & Exhibit Hall Finale (Plaza Ballroom AB)

12:45 p.m.–1:45 p.m.

Assigning E/M Levels: MDM Straightforward or Highly Complex? (Michigan 1ABC)

Shannon E. McCall, RHIA, CCS, CCS-P, CPC, CPC-I, CEMC, CRC, CCDS, CCDS-O

During this session, Shannon McCall will help you understand how E/M services may be assigned based on complexity of medical decision-making (MDM) and cover all the most important E/M issues for outpatient CDI.

1:55 p.m.–2:55 p.m.

Tines on the Same Fork: Supporting Physician Engagement in Ambulatory CDI Through a Dyad Partnership (Michigan 1ABC)

Sarah J. Hartley, MHA, RHIA, CDEO, CRC, and Purvi K. Shah, MD

Hear how NorthShore University HealthSystem uses a dyad leadership structure for quality improvement efforts and how it has been successful in ambulatory CDI as the program develops and expands. The model allows for impactful engagement with physicians in the ambulatory risk adjustment space.

2:55 p.m.

Symposium Adjourns

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... and to Our Exhibitors



Notes

Notes

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