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CDI IN BLOOM | **acdis 2023**
MAY 8–11, 2023



Utilization Review and CDI: Collaboration Is the Key to Success

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Presented By



Teri Rice, RN, MSN, MBA, MHA, CHC, is a regulatory instructor for HCPro, which is based in Brentwood, Tennessee. She is the lead instructor for HCPro's Medicare Boot Camp®—Critical Access Hospital Version and Rural Health Clinic Version and an instructor for the Medicare Boot Camp®—Utilization Review Version. She serves as a regulatory specialist for HCPro's PROPEL Medicare advisory services, providing regulatory guidance on coverage, billing, and reimbursement, and is a subject matter expert for the National Association of Healthcare Revenue Integrity (NAHRI). She has extensive knowledge of Medicare billing and compliance issues in addition to CDI, appeals, denials, and audits.

Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
 - Identify barriers to effective communication and listening
 - Describe how to break down the walls of communication to be successful in improving patient status.
 - Describe best practices in building a collaborative relationship between Utilization Review and Clinical Documentation Integrity to improve reimbursement outcomes.
 - Recognize the importance of team building to be successful

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Get to Know You...

What is your license/certification?

- Nurse?
- Coder?
- Other?

Who do you report to?

- Case management?
- Finance?
- Medical Records?
- Other?

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Communication and Listening

Five Types of Communication



Intrapersonal



Interpersonal



Small group



Public Speaking



Mass Communication

Barriers to Effective Communication

Process Barriers – Perception of what is being communicated

Personal Barriers – Individual communication competence and interpersonal dynamics

Physical Barriers – Distance between people, environment, noise

Semantic Barriers – Understanding and interpretation of what is being communicated

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Listening Styles



Results – Interested in the result of the message



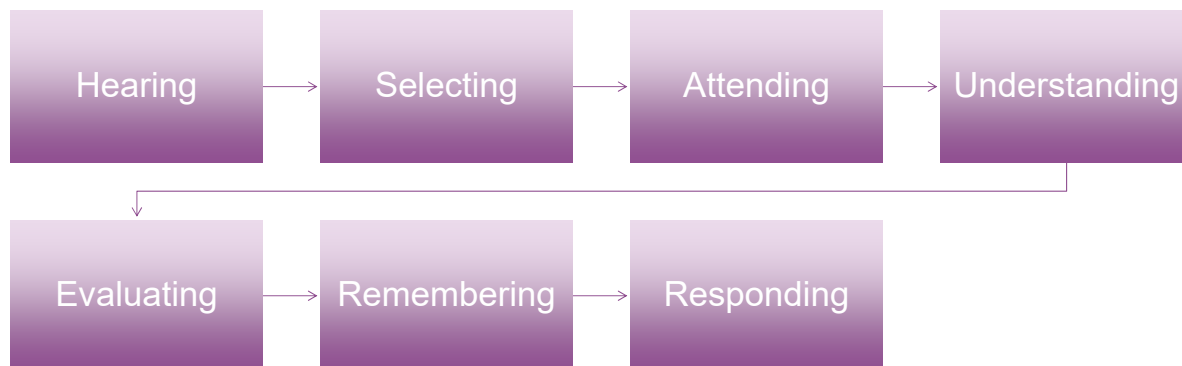
Reasons – Want to hear the rationale of the message



Process – Discuss the issues in detail

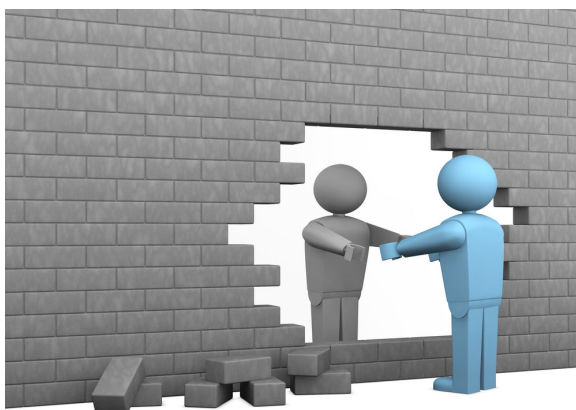
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Stages of Listening



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Breakdown the Walls



- Build new bridges – Create teams by bringing in staff from other departments
- Improve transparency – Allow staff to communicate what they are seeing (trends)
- Recognize the need for better communication – The us-versus-them mentality
- Stop judging – Do not criticize. We do not need to agree with the other person but we should listen to their ideas
- Be an effective role model – Anyone can be a leader and others will follow the leader; set the standard

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Building the Team

Role Identification

Clinical Documentation Specialist

- Perform advanced chart review
- Query the provider for additional information for coding accuracy
- Documentation guidelines to accurately represent the severity of illness and complexity of care

Utilization Review Nurse

- Review medical record for level of care and medical necessity
- Offer documentation information to the provider to fill in the gaps of incomplete medical records
- Use national guidelines to confirm the need for acute hospitalization

Goals of Working as a Team

- Prevent medical necessity denials
- Improve coding accuracy
- Improve documentation integrity
- Improve quality metrics
- DRG assignment to increase reimbursement
- Meet value-based care goals

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How to Meet Those Goals



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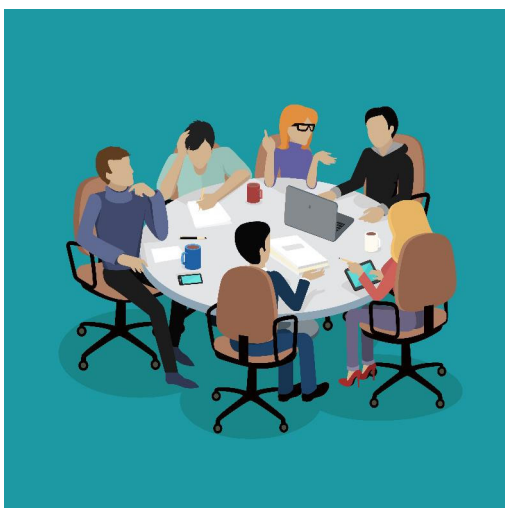
Teamwork in the Workplace

- Build a diverse team
- Clear roles for team members
- Trust
- Clear and frequent communication
- Team meetings
- Encourage brainstorming
- Use each team members strengths



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Who Should Be at the Table?



Utilization Review Nurses

Clinical Documentation Specialists

Coders

Physician Advisor

Registration Staff

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What Does This Look Like?



Provide educational sessions together (i.e., lunch and learn)

This gets everyone on the same page
Promotes healthy conversations with physicians and each other
Share feedback on what we are seeing in the medical record
Great opportunity to have a huddle



Have face to face conversations



Pick up the phone and call each other or use secure texting

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Celebrate the Small Successes



Learning from others –
you don't know what you
don't know



Helping others with the
work – offer to finish a
project or task



Receiving or giving praise
– everyone likes to be
recognized



Being asked for advice –
your opinion matters

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Thank you. Questions?

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In order to receive your continuing education certificate(s) for this program, you must complete the online evaluation. The link can be found in the continuing education section of the program guide.