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CDI IN BLOOM | **acdis 2023**

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Grow Your Own Leaders: How CDI Career Ladders Help Your Staff Flourish

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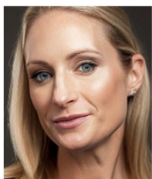
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Presented By



Dawn Diven, BSN, RN, CCDS, CCDS-O, CDIP, is system enterprise director of inpatient and outpatient CDI at West Virginia University Medicine in Morgantown, West Virginia. She has been an ACDIS Leadership Council member since 2019. She has 17 years of CDI experience, including speaking engagements at the national level, and has been a guest on the ACDIS Podcast.

Presented By



Aimee Van Balen, RN, BSN, CCDS, is a CDI specialist at Brigham and Women's Faulkner Hospital (Mass General Brigham) in Massachusetts. She has clinical experience in medical, surgical, and cardiac care. Van Balen has 14 years of experience in CDI and serves as a mentor for her peers within her department and the Massachusetts ACDIS local chapter. She reviews concurrent and retrospective charts and provides ongoing physician education. Van Balen is an active member of the Chapter Advisory Committee. She was selected for the ACDIS Advisory Board in 2020 and was published with her colleague in the *Journal of Interprofessional Workforce Research and Development*.



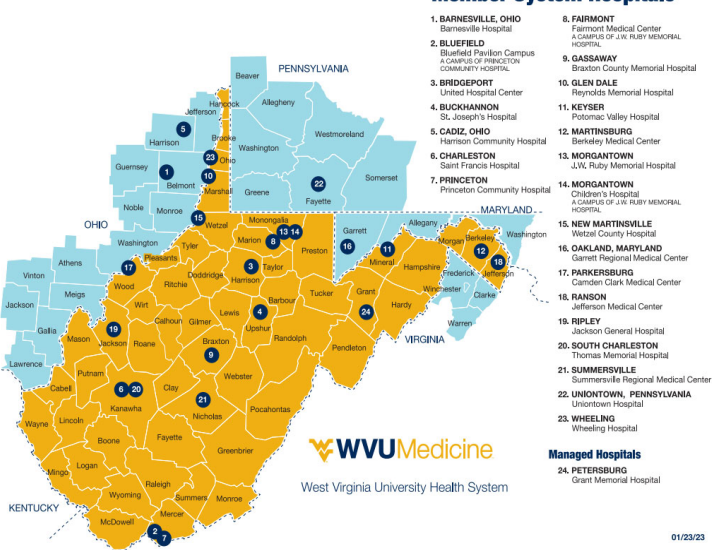
Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
 - Define: A career ladder as it relates to their Clinical Documentation Integrity Program
 - Identify: Potential areas of focused responsibility, professional and program growth
 - Identify: What goes into a business case supporting a career ladder ask
 - Verbalize: The return on investment of a CDI career ladder: recruitment, retention, and organizational success
 - Identify: Ways to stay motivated if a career ladder is not available

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West Virginia University Medicine Current Structure

Member System Hospitals



- 1 - 700 bed Academic Facility
- 7 - 100-200 Bed Acute Care Community Hospitals
- A 150 bed Children's Hospital
- Numerous Ambulatory Family Medicine Clinics
- We do not review 100% of cases
- We do not cover critical access hospitals
- We are 100% remote pre-pandemic
- 26 inpatient CDI
 - 11 Total Level 3's
- 2 Outpatient CDI
 - 1 level 2
- 2 Inpatient Managers
- 1 Outpatient Manager
- 2 Educators
- 1 Director

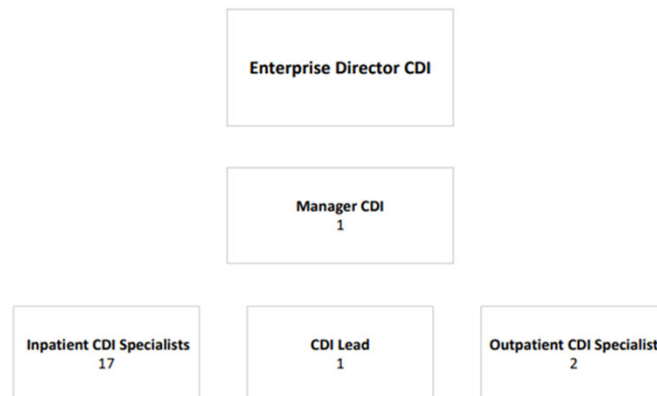
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Initial Org Structure 2019



CDI Division 2-538



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How Do You Distinguish Levels?

They All Do the Same Thing

Career Ladder Levels Defined

- Level 1
 - May be at an introductory level with 0-2 years experience
 - May have many years of experience with no interest in career growth
 - Some choose to take on projects but have no intention of sitting for exam
- Level 2
 - CDI credential required
 - 3 to 4 years CDI experience
 - Semi-independent minimal guidance
 - Capable of assisting level 1
 - May attend collaborative committee
 - Other assignments depend on individual interests and program needs
- Level 3
 - CDI credential required
 - 5 years or more experience CDI
 - Functions independently
 - Capable of advanced project responsibilities
 - Contributes to strategic management
 - Mentors level 1-2 and new hires/merged staff
 - Developing as thought leadership



Our Criteria for Professional Development

- Voluntary move
- Everyone must meet productivity and quality measures
- Minimum of 6 initial reviews and 6 follow-up reviews per day
- Minimum 15% query rate
- Quality score minimum 95%
- Everyone must obtain a CDI credential to advance (not reimbursed)
- There is no demotion only coaching and next steps
- There is a salary increase with each successive rung of the ladder
- Everyone must have an assignment and/or committee/greater responsibility
- Internal Leadership Council rotation
- Participate in interviews
- Presentation of projects to team
- Industry presentations encouraged
- Online leadership classes



What Gets a Yes From the C-Suite?

AKA the Sell

Your Knowledge and Data

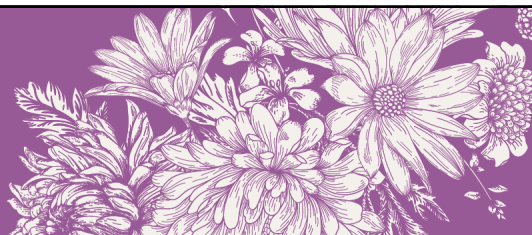
- Know your organizational goals and how you can impact them.
- Know who you report to and the value of your program for them.
- Finance – what speaks to them? Quality – what speaks to them?
 - What is the return on investment for your reporting structure?
 - How have you and can you impact their bottom line?
- Know the cost of your program: salaries + benefits, education, supplies.
- How will your career ladder offset the cost of your program?

What We Presented

- Reduction of turnover: time, energy, and dollars spent on hiring and training
- Opportunity boosts morale
- We mapped the potential revenue value associated with query results that were placed by our top performers who would qualify for advancement if given the opportunity.
- Based on our data we projected that our level 3 qualified staff could bring in a minimum of 300-400K each.
- We showed year over year success in terms of coverage rate and dollars.
- We showed the current \$ value and the \$ value of expanding upon our current limited projects. Do the math.
- In the end our C-Suite was willing to take a chance on our model.

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Next Steps

Choosing Projects and Making Assignments
But Won't Productivity Take a Hit?

Career Ladder Projects Incorporated Into Productivity

- Focused concurrent DRGs
 - Targeted areas: Simple pneumonia, sepsis, Vizient trends, cases w/out CC/MCC
- Focused concurrent diagnoses
 - Through software priority scoring
- Signature service lines
 - Heart and Vascular Institute
 - Neurosciences
 - Oncology
 - Pediatric hospital
- Mortality reviews/risk adjusting/retro reviews count
- Quality focus: PSIs, readmissions
- Second level reviews
- Denial reviews and appeals

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With Maturity Come Career Ladder Projects Outside of Productivity

- We have a time tracker
- Hours outside of production are deducted from the total
- Escalations and resolutions
- Software superuser
- Clinical definitions
- Leadership council
- Mentorship with mergers, acquisitions, onboarding
- Communication avenues for those choosing not to advance
- Report building for product and program ROI
- Report building and data collection for future business cases
- Policies and procedures
- Workflow design

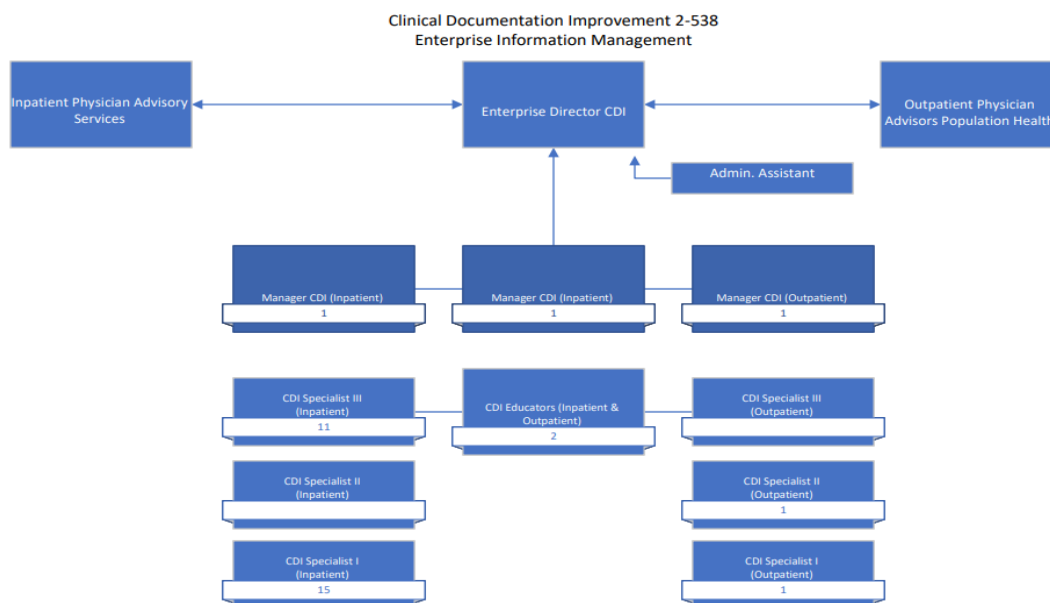
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Our Program Has Flourished

*Investment in the team has brought the greatest return for our program.
Staff in turn, are invested in and proud of their program no matter their level.*

- At the end of 2022, our dashboard reflected the highest overall potential revenue impact EVER!
- Established a successful query escalation process rescuing over \$200K in 2022.
- The program now has an infrastructure with greater bandwidth for scope of practice.
- Siloes have been broken down because we have the ability to collaborate.
- Denials team contributed to appeal success + bonus: prevention education
- Our coverage rate from 2021-2022 increased by 15%
- Our sepsis initiative had a 1.6-million-dollar impact over 2 years
- Our simple pneumonia initiative in 2 focus facilities had a \$200K impact over 2 years
- Signature Service Line Impact is over 2 million per year
- We made good on our ROI projection too: Hired 2 level 3 qualified staff who's query value in one year totaled 1 million dollars

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How Our Team Has Flourished

- Those with years of experience, a wealth of knowledge, and a desire for challenge have been rewarded with opportunity.
- Staff have input into their program - they have a voice, and we listen.
- They help develop policies and procedures.
- Staff has greater engagement with involvement.
- Some have expressed interest in strategic data analysis
- Subject matter experts (SMEs) emerged
- Everyone has an opportunity to promote and take on expanded roles.
- Leaders will be identified: Thinking Succession Planning
- We have promoted 6 internal staff to level 3 and 1 to level 2
- One internal staff member recently applied for and promoted to an educator role
- Ability to hire experienced staff members/minimal training or downtime
 - We have hired 5 level 3 qualified staff members
- Interview question: What interested you in applying for this position: “The opportunity for professional growth”



Lifespan Corporation, Providence Rhode Island

- CDI program: originated April 2009
- Facilities:
 - Rhode Island Hospital: Acute care Level 1 trauma teaching hospital – 719 beds
 - Hasbro Children's: Acute care Level 1 trauma teaching hospital – 116 Pedi beds
 - The Miriam Hospital: Acute care teaching hospital – 235 beds
 - Newport Hospital: Community acute care hospital – 129 beds
- About Us:
 - Reports to Finance
 - Management: Director, Manager, Data Coordinator, Administrative Assistant
 - CDI Specialists: 26 full time
 - Fully electronic medical record: EPIC and 3M 360
 - Fully remote with an open option to come on site when needed/wanted



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Lifespan: Our Clinical Ladder



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Climbing the Ladder in Summary:

Step 1: Novice to 3 years of CDI experience

Step 2: 3 years+ as a CDI; current CCDS certification

Step 3: 5-7 years as a CDI; current CCDS certification; seen as a resource to other staff and able to orient novice CDIs

Step 4: 5-7 years as a CDI; holds current CCDS Certification; expert level of Coding guidelines and CDI best practice. Ability to audit and provide feedback to other staff

- Each step comes with an increase in salary
- CCDS and other certifications are not reimbursed by the department

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Lifespan CDI Clinical Ladder: Step 1

Clinical Documentation Specialist

Is responsible for concurrent auditing of medical record documentation to assist with evaluating and improving the quality of clinical documentation of services to accurately reflect severity of illness, expected risk of mortality, and complexity of care of the patient.

Lifespan CDI Clinical Ladder: Step 2

• Senior Level Clinical Documentation Specialist

- Requires minimum 3 years CDI experience
- Requires a certification in Clinical Documentation Integrity

- Demonstrates expert knowledge of ICD 10 codes and MS-DRG/APR DRG assignment.
- Assists precepting and education of new staff.
- Identifies and develops educational materials for providers.
- Accurately performs concurrent and retrospective reviews utilizing risk adjusted methodology per departmental policy for Mortality and HAC/PSI reviews.
- Assists with audits.
- Assists with developing, reviewing, and updating of query templates.
- Demonstrates advanced technical ability with current software used by department.
- Has ability to independently develop complex queries.

Lifespan CDI Clinical Ladder: Step 3

- **Lead Clinical Documentation Specialist**
 - Requires 5-7 years of CDI experience
 - Requires holding a certification in Clinical Documentation Integrity
- Onboards and precepts new staff.
- Assists with audits.
- Accurately performs concurrent and retrospective HAC/PSI, or Mortality reviews utilizing risk adjusted methodology and AHRQ specifications serving as a role model and departmental resource for this.
- Active in knowledge of HAC/PSI, Mortality benchmarking Risk adjustment opportunities.
- Assists in individual providers or departments audits.
- Demonstrates expert technical ability with software programs.
- Assists with development and revision of internal policies and procedures.

Lifespan CDI Clinical Ladder: Step 4

- **Second Level Reviewer Clinical Documentation Specialist**
 - Requires 5-7 years of CDI experience
 - Requires holding a certification in Clinical Documentation Integrity
 - Requires expert ability in Coding guidelines, MS-DRG/APR-DRG's, IPPS including new CMS guidelines, CDI practices, and medical knowledge.
 - Requires strong auditing skills, systems-thinking, project management, and facilitation skills aimed at performance improvement of our CDI staff and providers.
- Oversees network-wide formal CDI auditing
- Ability to write appeal letters to insurers
- Demonstrate enhanced knowledge of anatomy and pathophysiology
- Provides feedback and data on all auditing completed to CDI management
- Designs and delivers presentations to CDI, coding and providers
- Proactively evaluates and identifies educational opportunities

Lifespan CDI Clinical Ladder: Step 4

- **Clinical Documentation Specialist System Educator**
 - Requires 5-7 years of CDI experience
 - Requires holding a certification in Clinical Documentation Integrity
 - Requires expert ability in coding guidelines
 - Aware of CMS guidelines
 - Ability to identify educational opportunities for staff and providers
- Oversees and develops network-wide formal CDI orientation program for new staff
- Coordinates with CDI data analyst for reporting and identifying educational opportunities
- Expert knowledge of Coding Guidelines/Clinics, CDI best practice and medical advancement
- Provides education for all members of the patient care team
- Acts as a resource to the clinical providers
- Proactively evaluates educational products for relevancy

Benefits of a Clinical Ladder From a CDI Staff Perspective:

- Provides opportunity for upward growth within the department
- Allows the ability for staff to set personal goals and achievements; gives CDIs something to strive for
- Financial incentive with salary increases with each step
- Encourages staff to stay current in knowledge of coding, CDI and medical/surgical trends
- Encourages CDI's to stay ENGAGED!
 - It is well known that engaged employees are more likely to stay committed to staying at the organization

Benefits of a Clinical Ladder From a CDI Staff Perspective:

- **Encourages staff to obtain Clinical Documentation Integrity Certification before they have the ability to climb the ladder**
 - With this also comes new thoughts, ideas and concepts
 - CEU obtainment to recertify per guidelines
- **Allows CDI staff the autonomy to build concrete and trusting relationships with the providers as senior level CDIs are assigned to specific departments**
- **Fosters development of advanced ability through HACS/PSI and mortality reviews**
- **Encourages staff to be self-determined and autonomous in their individual roles**
- **Provides opportunity for advanced level CDIs to take ownership**
 - Query creation; creating smart phrases; educational opportunities for themselves; identifying trends in the industry and to be seen as a leader within their department – orienting new staff and contract staff as needed

Benefits of a Clinical Ladder From a CDI Staff Perspective:

- **Staff ability to dive into new roles quicker**
 - They already know the culture of the organization/department
 - Familiar with the policies, procedures and expectations
 - This saves the organization and the department both time and revenue which has a rolling positive impact throughout the revenue cycle. It also alleviates stress and loss of productivity on the seasoned staff with less training and orienting.
- **Create and maintain provider tools, tips, education on a regular basis**
 - Utilizes their creative sides!
 - Initiate a CDI newsletter, create dept specific information sheets for provider work areas in their assigned departments
 - Consider starting a department twitter account with documentation tips; other social media initiatives as approved by facility
 - Create mnemonics or other tips
 - Explore creative ways to increase virtual education and provider engagement
 - Think outside the box and encourage other staff to do the same – the possibilities are endless!

Most importantly it's great for departmental morale when employees can see an opportunity to grow within their organization. That ripple effect can be overwhelmingly positive!

How Promoting From Within Could Benefit Your Department:

Internal promotions not only boost staff morale, but there are concrete benefits to the organization as well! It is a win-win scenario!

1. Promoting from within can save time and money

- Average cost to a company to hire a new salaried position (vs keeping the current) is 6-9 months salary
- Marketing, Interviewing, HR and benefits, training and loss of productivity

2. Internal mobility can help with retention and motivation

- Employees are interested in career opportunities within their own company. Lack of career growth is one of the top reason workers report for leaving current positions.
- Retention and promotion from within provides a huge moral boost throughout the entire department.
- Loss of engagement can also lead to a loss of productivity. CDI productivity = financial impact; HAC/PSI and risk adjustment impacts; MCC/CC capture rate impact, possible DNFB impact.

3. There's less risk involved with internal promotions

- It is estimated that upwards of 30% of job applicants leave new positions within the first 3 months on a new job.
- Hiring from within helps assure that you have a well-suited candidate for the position that is familiar with the department as well as the expectations for the role.

These are just some the reasons that many organizations post on internal job boards for a certain number of days prior to posting externally/publicly.

<https://www.umassglobal.edu/news-and-events/blog/promoting-from-within>

What to Do if Your Department Does Not Have a Clinical Ladder: Set Yourself Up for Future Promotion Through Self-promotion!

- Unfortunately, many CDI departments do not have a clinical ladder, or the model does not fit into the organization's plan or budget
- If this is the case in your current situation you can still set yourself up for future success
 - **Do NOT get discouraged!**
 - **Do NOT be afraid to step outside of your comfort zone!**
 - **Promote yourself and your career in other creative and innovative ways**
 - Join an organization such as ACDIS or AHIMA
 - Local and national chapters are available to the CDI/coding community
 - Network with others on LinkedIn
 - Attend vendor supported networking opportunities
 - Get active in industry specific social media sites

Set Yourself Up for Future Promotion Through Self-promotion

Within your department:

- Stay motivated, educated and current in industry standards
- Offer to serve as a mentor or orientate new staff
- Consider joining a steering committee at your organization
- Get advanced knowledge on HACS/PSI, risk adjustment and CMS guidelines
- Get involved in denials management, trends and denial prevention
- Present updates/coding clinics on a scheduled basis at staff meetings
- Present difficult case studies and learning opportunities at staff meetings
- Get actively involved in a CDI and Coding collaborative

Set Yourself Up for Future Promotion Through Self-promotion

On a state or national level:

- Join a state ACDIS chapter – often free or minimal fees
- Consider volunteering for committees
- Network within the industry
- Submit a proposal to speak and present at conferences
- Submit to be on the ACDIS Member spotlight for the CDI Journal
- Offer to facilitate, plan or speak at a meeting
 - Presenting helps promote your organizations partnerships and successes as well as introducing your name to your regional or nationwide colleagues
- Embrace virtual opportunities outside your geographical area
- Contribute to industry related journal, white papers, social media and podcasts
- Serve as a mentor to others with less experience/expertise

Set Yourself Up for Future Promotion Through Self-promotion!

These are all great ways to get your name known in the industry and serves as a great way to build your resume to stand out in future opportunities both in and outside your organization!

Remember that we all build our own resumes; opportunities are available if you take advantage and step outside your comfort zone

“Unless you go out of your comfort zone, unless you challenge yourself, you cannot grow. Leadership is the art of growing by pushing yourself past your own physical, mental, emotional, and spiritual limits.”

— Amit Ray, [Mindfulness Meditation for Corporate Leadership and Management](#)



Thank you. Questions?

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