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CDI IN BLOOM | **acdis 2023**

MAY 8–11, 2023



Orienting From Afar: Virtual Orientation and Education

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hcpro

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Presented By



Autumn Reiter, MBA, BSN, RN, CCDS, CCDS-O, CDIP, CCS, is vice president of CDI and tech enablement at CorroHealth in Omro, Wisconsin, where she serves clients' staffing and auditing needs for both the inpatient and outpatient settings, as well as providing education to physicians, nurses, and coders. After beginning her nursing career in the ICU, she served as a CDI specialist and clinical coordinator before joining CorroHealth (TrustHCS) in 2015. Reiter has authored articles for AHIMA and spoken at state conventions. She is an ACDIS Advisory Board member and contributed to the 2021 and 2022 *ACDIS Outpatient Pocket Guide*.

Presented By



Laura J. Werner, DC, MSN, RN, BA, BSN, CDIP, CRCR, CCS, is system director of CDI for Adventist Health in Roseville, California, overseeing California, Oregon, and Hawaii. That oversight includes 16 acute care hospitals, five critical access hospitals, and more than 300 clinics for inpatient and outpatient programs. She has over 30 years of clinical experience, including a dozen in CDI where she has assisted in the design and implementation of acute care and critical access CDI departments, working both on-site and remote.

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Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
 - Design a remote, robust onboarding program to facilitate learning
 - Construct an educational program and structure clinical concepts virtually
 - Develop an online CDI community that supports the orientee and builds relationships
 - Demonstrate how to use technology in the remote onboarding process
 - Create a plan for ongoing education, compliance, and quality program from afar

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With a Show of Hands...

- How is your CDI team currently conducting orientation and education?
 - 100% Remote
 - 50% Remote and 50% Onsite
 - 100% Onsite
 - Other



Getting Started

Creating the Bond



Preboarding

- During the interview
 - Make a real connection
 - Record individual information
 - Ask how and where they would like to receive information
 - Use checklists:
 - Level of expertise
 - Essentials for the first day

Interesting answers to remember

Useful bonding responses

- Personal stories they shared
- Family and pet names
- Hobbies or sport interests

Why they choose this vocation and facility?

- Close to home
- Pay
- Spiritual affiliation

How did they end up here, doing this, right now?

- Referral
- Read about the duties

Have they ever worked remotely?

- What do they know or anticipate will be the greatest challenge?

Assess their values

- Family
- Education
- Achievement
- Money

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Preboarding

Interview checklists

Microsoft suite	Meeting platforms	Tools	Other
<input type="checkbox"/> Excel <input type="checkbox"/> Word <input type="checkbox"/> PowerPoint <input type="checkbox"/> Access <input type="checkbox"/> Visio	<input type="checkbox"/> Teams <input type="checkbox"/> Zoom <input type="checkbox"/> GoToMeeting <input type="checkbox"/> Google Meets <input type="checkbox"/> Skype <input type="checkbox"/> Webex	<input type="checkbox"/> 3M <input type="checkbox"/> Cerner/Epic <input type="checkbox"/> Medcloud <input type="checkbox"/> SharePoint <input type="checkbox"/> Google Docs <input type="checkbox"/> Vizient	<input type="checkbox"/> Design and development of queries <input type="checkbox"/> HCCs versus DRGs <input type="checkbox"/> Reconciliation <input type="checkbox"/> Auditing <input type="checkbox"/> Creation and delivery of educational materials <input type="checkbox"/> Mortality and denial reviews <input type="checkbox"/> Quality PSI/HACs-POA

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Preboarding

During the preboarding phase:

- Make sure you have the correct email address or mailing address to send information
- Send a welcome letter with important contacts
 - IT
 - Trainer
 - Assigned buddy
 - Team members
 - Your contact
 - HP
 - Onboarding schedule

Include:

- How and where they will receive their computer with a list of all equipment they will receive
- If they are to pick it up:
 - Location with detailed directions
 - Person and contact information for that person
- If being shipped include:
 - Shipping date
 - Expected date of arrival
 - Ask for confirmation when received

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First Day Meet and Greet

- Start-time celebration
 - Set up a virtual meeting with a back-up phone number with the trainer
 - Introduce the employee to the equipment and how to access different programs
 - Set up a meet and greet over lunch with the team and identify their buddy; if budget allows, have a lunch delivered to the new employee's home. Other suggestions:
 - A company mug...
 - A bouquet of balloons or flowers
- Present a slide of introduction including some of the things you learned during the interview about hobbies and interests
- Have team members not only introduce themselves but talk about who they are and to bring up areas that they have in common with the new team member
- This is a time of accepting the new member into the team, a time to rejoice and share

Make sure they are given a schedule for their training with a list of competencies. Let them know that they will only be signed-off on each competency when both the trainer and the employee feel the task has been completely accomplished.

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Building a Remote Support Team

Trainer

- Works off the competency list
- Assigns daily tasks
- Tracks progress
- Reviews cases on a case-by-case basis
- Audits all work
- Sets up future audit schedule
- Assess additional training needs as they arise

Buddy

- Buddy reaches out at the beginning and end of each day
 - What do you have scheduled for today?
 - Are you worried about anything that I can help you with?
 - What was the best part and worst part of your day?
 - What do you have planned for the weekend?

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Communicating and Support



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Bonding Activity

- One of the most effective ways to form a bond is through finding commonalities amongst team members, which can be difficult in the remote environment
- We wanted to demonstrate on easy this process can be to start with a simply activity

Let's try an activity!

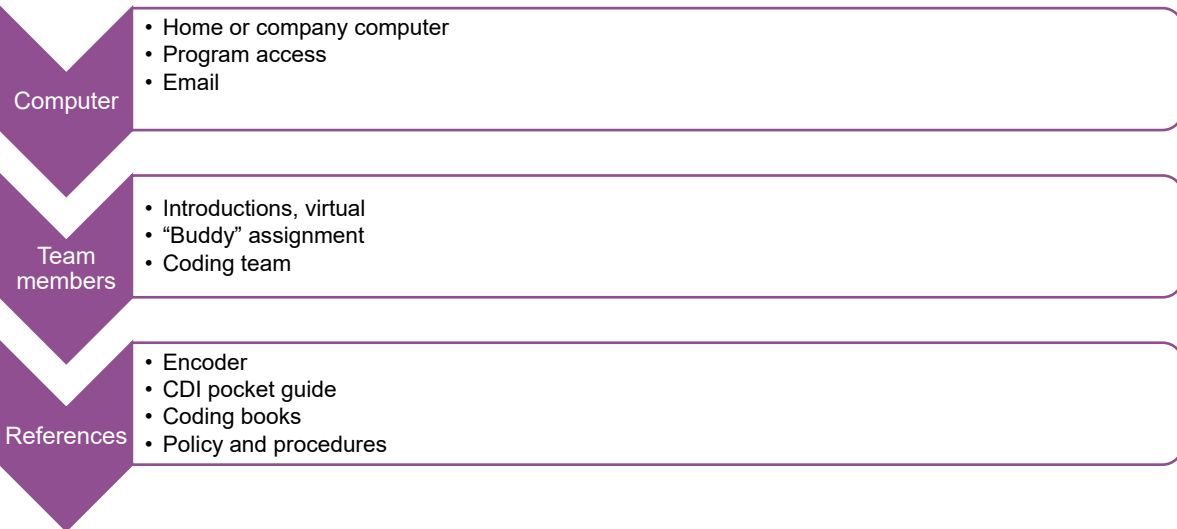
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Taking Control of Technology

Success Depends on the Right Equipment



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Communication



- Written or verbal
 - Effective options
- Email
 - Etiquette
 - Signature line
- Calls
 - Voice
 - Internet
- Team members
 - Other CDI
 - Coding
 - Providers
 - Other departments

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Virtual Meetings

Etiquette

- Private space
- Limited distractions
- Scheduled hours

Platform

- Accessibility
- Facility friendly options
- Back-up plan

Tips to hosting

- Test access
- Know the platform
- Be prepared

Tips to participating

- Limit movement
- Avoid multi-tasking
- Be camera-ready
- Avoid eating and drinking



Educating from a Distance

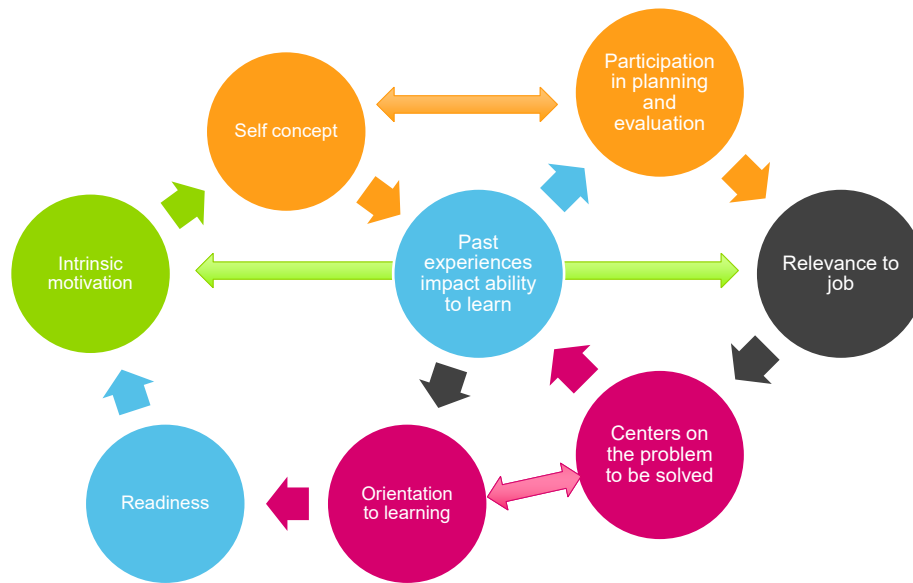
Key Factors

- Understanding Adult Learning Theory
- Organization
- Method of Delivery

Adult Learning Theory

Five Pillars

Four Principles



Your Complete Guide to Adult Learning Theory | NEIT

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Organization



Time / Attendance:	Completion Date:	CDS / Trainer Initials:	Getting Started:	Completion Date:	CDS / Trainer Initials:
Clocking In/Out	10/10/22		User ID (611) and Password	10/10/22	
Reporting Time	10/10/22		System Access Training	10/10/22	
Requesting PTO	10/10/22		Policies & Procedures (Lucidoc)	10/10/22	
Calling in Sick	10/10/22		Email / Outlook Account	10/10/22	
Breaks / Lunch	10/10/22		Telephone	10/10/22	
Holidays	10/10/22		(No) Keys / (Yes) Badges	10/10/22	
Overtime	10/10/22		Hospital Org. Chart	10/10/22	
Pay Days	10/10/22		CDI Organizational Chart	10/10/22	
Expense Reimb. / Oracle	10/10/22		CDI Goals/KPIs	10/10/22	

Department Guidelines:	Completion Date:	CDS / Trainer Initials:	Process:	Completion Date:	CDS / Trainer Initials:
Personal Calls	10/10/22		Customer Service Standards	10/10/22	
Personal Copies	10/10/22		Telephone Etiquette	10/10/22	
Internet Usage	10/10/22		Voicemail Standards	10/10/22	
Cell Phone Pictures	10/10/22		Email Standards	10/10/22	
Desk	10/10/22		Email Response Time	10/10/22	
Storing Personal Items	10/10/22		Dress Code	10/10/22	
Job Description	10/10/22		Obtaining Supplies	10/10/22	

Safety:	Completion Date:	CDS / Trainer Initials:	Physician Education:	Completion Date:	CDS / Trainer Initials:
Fire Safety N/A	10/10/22		WMH CDI education	10/10/22	
Emergency Exits N/A	10/10/22		Weekly Education	10/10/22	
Overhead Notifications N/A	10/10/22		Monthly Education – 3M	10/10/22	

Healthstream Modules:	Completion Date:	CDI/Preceptor Initials:
New Hire Pre-Assessment 19 Modules Post-Assessment 30 Days to complete System Modules (x)		

Quality:	Completion Date:	CDI/Preceptor Initials:
Present on Admission (POA)		
Hospital Acquired Conditions (HAC)		
Patient Safety Indicators (PSI)		

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Method of Delivery for Education

Voice over
PowerPoints

Video
instruction

HealthStream,
with quizzes

Trainer covering
the same cases

End of day case
review

Assign specific
3M webinars

Assign them the
development of
education

Require they
attend ACDIS
courses

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On-Going Education



Weekly updates



Monthly training



Quarterly *Coding Clinic*
education



Yearly updates

Education



Homegrown



Purchased

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Ongoing Monitoring

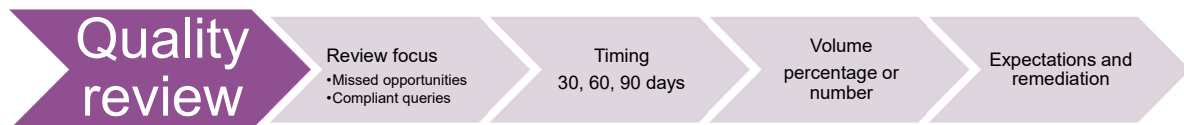
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Program Goals



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Quality Assurance and Compliance



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Mentoring Checklists

Workflow and Chart Review	Assessment
Productivity	
Management of pending queries	
Chart Review Completeness	
Identifying query opportunities that affect DRG	
Most frequent Query opportunities identified:	
Missed opportunities identified:	
Follow up on Subsequent Reviews. -Timely follow up on subsequent reviews and potential query opportunities	
Query Composition	Assessment
Query Validity	
Query Timing	
Introduction/HPI Section	
Clinical Findings/Indicators Section	
Treatment section	
Question and Choices Section	
Accuracy	
Conciseness	
Overall Query Compliance	

Codeset and Query Impacts	Assessment
Codeset: Capturing Correct DRG, PDX	
Capturing MCC, CC, SOI/ROM	
Codeset: POA	
Query Impact: Baseline DRG	
Query Impact: Updated DRG	
Physician Response	

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Query Tracking and Performance

Specific Query Performance:	Date	Date
Query Type		
KEY:		
Highlighted =most common.		
Blank = Unable to evaluate (No data available)		
S = Generally Satisfactory		
Is Needs Improvement/Guidance		
Abnormal lab finding		
Abnormal clinical finding		
Abnormal pathology finding		
Abnormal radiology finding		
Acute kidney injury		
Acute tubular necrosis		
Altered mental status		
Anemia and/or specificity		
Atrial Fibrillation Specificity		
Bacteremia/SIRS		
Bipolar specificity		
BMI-associated diagnosis		
Cause and effect		
Cardiopulmonary arrest underlying etiology		
Cerebral edema or brain compression		
CHF acuity		
CHF type		
CKD stage		
Complication CAUTI		
Complication Central line		
Complication PD catheter		
Complication (Surgical - Intra or Postop)		
Concur with documentation		
Conflicting documentation		
COVID-19		
Debridement		
Depression specificity		
Diabetes Specificity		
Drug/ETOH use, abuse, dependence, withdrawal		
Encephalopathy specificity		
Functional quadriplegia		
Hemorrhagic disorder due to extrinsic circulating anticoagulant		
HIV clarification		

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Quality Assurance Tracking

Missed opportunity review

CDS	Date of QA	QA Type	Account #	Missed Query Opportunity	Missed Opportunity				
					Admission dates	Review dates	Query Subject	Educational query opportunity	Risk factors, Clinical Indicators & Treatments
Enter name									
Enter name									
Enter name									
Enter name									

Compliance reviews

CDS	Date of QA	QA Type	Account #	Query Composition				Comments
				Query Date	Query Subject	Query Response	Suggested additional Risk factors, Clinical Indicators & Treatments for future queries	
Enter name								
Enter name								
Enter name								
Enter name								

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Putting It All in Motion

You Have the Tools...



Appropriate equipment



Team support



Technology know-how



Virtual education



Ongoing support and monitoring

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In Closing.....

- After this discussion, by a show of hands, if you were not performing orientation remotely before, would you feel equipped to attempt it now?
 - I would feel comfortable attempting a remote orientation.
 - I would consider remote orientation for my team.
 - Although remote orientation is possible, I prefer to perform orientation in person.



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.