How to Set Up a Successful Outpatient CDI Program

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Presented By

- **Colleen Gianatasio, CPC, CPC-P, CPMA, CRC,CPCO,CDEO, CPPM, CCS, CCDS-O, AAPC-Approved Instructor,** is the director of CDI and coding compliance at Capital District Physician's Health Plan in Albany, New York. She has more than 20 years of experience in the health insurance field, and has experience in customer service, claims, quality, and coding. In her current role, Gianatasio's primary responsibilities are provider engagement and CDI for accurate coding and reimbursement. She specializes in developing innovative coding curriculum and instruction to support compliance with federal guidelines and appropriate reimbursement processes. She is a certified AAPC instructor and enjoys teaching a variety of coding, documentation, and auditing classes. Gianatasio serves as president of the AAPC National Advisory Board for the 2022-2025 term.

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Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
  - Create an assessment for an outpatient CDI program
  - List the challenges of the outpatient setting
  - Determine staffing and training needs
  - Describe possible barriers to provider engagement and success
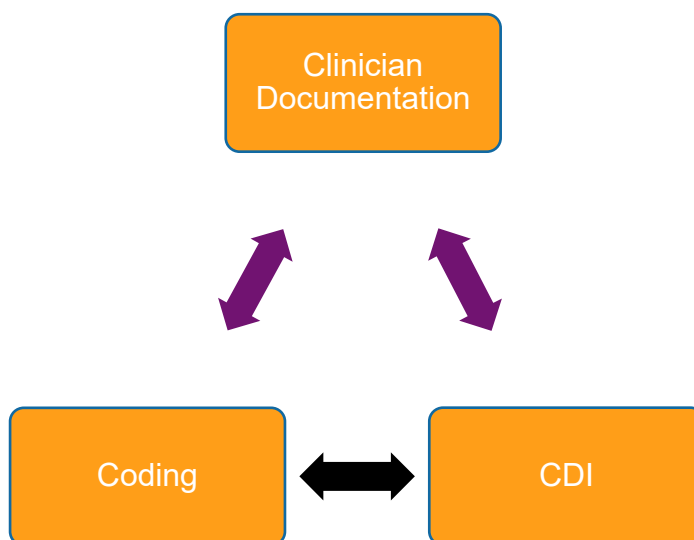 - Evaluate the success of their program

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Who is here today?

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Assess the Need for an Outpatient CDI Program

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What Made Us Consider an Outpatient CDI Program?

Clinician Documentation

Coding

CDI

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What Made Us Consider an Outpatient CDI Program?

- Reduced audit risk
- More actionable data
- Less administrative burden
- Improved physician engagement
- Better patient experience/outcomes

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Understand the Challenges of the Outpatient Setting

What Are the Challenges?

- Volume of outpatient visits
- Doctors don't have time
- Shifting reimbursement methodologies
- Changing guidelines and regulations

What Are the Challenges?

- New or established program
- Organization size and direction
- Experience of team

Determine Staffing and Training Needs

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Clinical? Coder? Both?

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What Skills Are Needed?

- Knowledge of coding concepts and guidelines
- Clinical knowledge
- Payment methodology knowledge
- Excellent communication skills
- Soft skills

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How Did We Train Our Team?

- Building relationships
- Organizing information
  - Patient identifiers
  - Date of query
  - Query
  - Relevant clinical indicators
  - CDI specialist name and contact information
- Query opportunities
- Query format
  - Open-ended
  - Multiple choice
  - Yes/No
  - Verbal

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How Did We Train Our Team?

1. Review documentation for any active conditions.
2. Be careful to review for possible conflict, e.g., provider documenting an active condition as a "history of."
3. Review active problem list for chronic conditions. Ensure there is evidence that these conditions are relevant to the current encounter.
4. Review medications list. Ensure it is current. Ensure that there is an indication listed somewhere in the current encounter for why the medication is prescribed.
5. Ensure that all relevant conditions have a clear plan and that the correct code is submitted on the claim.

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How Did We Train Our Team?

- Come prepared
- Know your audience
- Research additionally when needed
- Establish an agreed upon escalation policy
- Continually educate and use multiple approaches

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What Did We Look for When Selecting Our Team?

- Knowledge of coding concepts and guidelines
- Clinical knowledge
- Payment methodology knowledge
- Excellent communication skills
- Soft skills

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Possible Barriers to Provider Engagement and Success

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What Were the Barriers?

- People
- Process
- Technology

Evaluate the Success of the Program

What Are We Trying to Accomplish?

- We are responsible to ensure that the patient's record clearly reflects the patient's conditions and care provided.

- Legible
- Complete
- Clear
- Consistent
- Reliable
- Timely

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How Do We Measure Success?

Query date	CDI specialist	Provider	Focus area	Provider response/ date	Provider agreement Y/N	Financial impact	Notes

Total number of encounters	Total number of patients	Total number of queries	Total number of agreed	Financial impact

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What Oversight Is Needed/Are We Trying to Accomplish?

- Was the query necessary?
- Was the query compliant? If not, why?
- Were there missed opportunities for queries?

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Discussion

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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.

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