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CDI IN BLOOM | **acdis 2023**

MAY 8–11, 2023



In a Post-Covid World: Growing a Clinical Documentation Team From the Ground Up

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Presented By



Johanne “Jo” Brautigam, BSN, RN, CCDS, is the manager of CDI at Ensemble Health Partners/Roper Saint Francis Healthcare in Charleston, South Carolina. She became a CDI manager in 2013 and currently manages 12 CDI specialists, covering four hospitals. She is a former president of the South Carolina ACDIS chapter, a member of the ACDIS CDI Leadership Council and the ACDIS Events Committee, and a past member of the Furthering Education Committee. She is co-author of *The CDI Director’s Cut: A Guide for Effective Program Management* and a subject matter expert for ACDIS.

Presented By



Robin McKenzie, RN, CRCR, is a CDI specialist at Ensemble Health Partners in Johns Island, South Carolina. A registered nurse with 22 years of experience, McKenzie has worked in the operating room, acute rehab, home health, case management, and quality. McKenzie recently trained 11 brand-new CDI specialists and enjoys the daily challenges and learning opportunities of the CDI world.

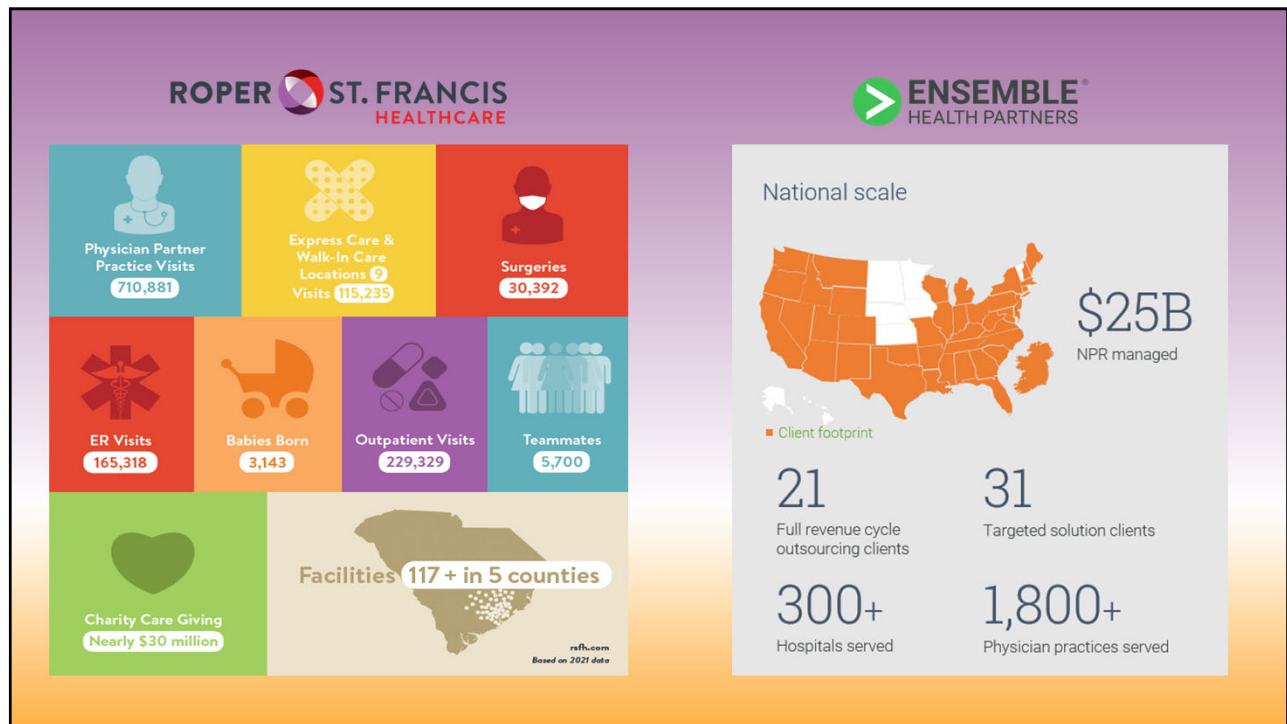
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Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
 - Identify the needs versus wants of the clinical documentation specialists and any structure change.
 - If change is inevitable, organize a plan to include all aspects of what is needed to build *YOUR* team.
 - Design a CDI team based on their work location, your healthcare system's principles, experiences learned.
 - List the best use of your resources for remote CDI training.
 - Keep looking forward.



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Last Year's Crop

Wants vs. Needs of the Team



Roper St Francis Healthcare CDI Team Structure

- July 2021
 - CDI Specialists: 6
 - 4 open positions (3 left in July)
 - Sr CDI Specialist: 1
 - Manager: 1
 - 4 Hospitals in this system
 - CDI Covered inpatient only
 - CDI was part of Revenue cycle and became outsourced in July
- January 2022
 - CDI Specialist: 1
 - 11 open positions
 - Manager: 1
 - Sr. Director 1
 - Working on transitioning to Ensemble Health Partners



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A High-Performing Team

- 100% mortality reviews
- Worked closely with Quality for PSI's, HAC's, ACR, ACD
- Preadmission reviews for TCAR & TAVR
- 2 CDI in the Dr Lounge for open DC queries
- Coding only did laterality, obesity and pathology queries
- 8 years as manager only had 4 CDIs leave for various reasons: Marriage, Retirement...
- RSFH CDI Team won 2021 3m CES CDI of the year award.
 - For turning around the mortality scores for the system in 6 months.

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What Happened?

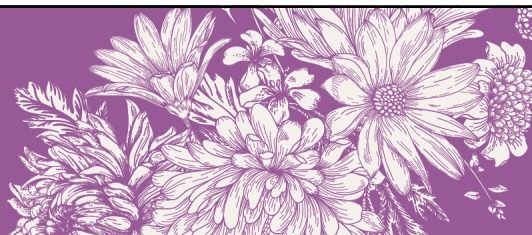
- The CDI fought coming back to the hospitals, could not see the value after being remote for COVID.
 - Never wanted to believe the providers now wanted the CDI back to help
- July 2021 the revenue cycle was absorbed by Ensemble Health Partners.
 - CDI was part of that.
 - Many of the team had 10 or more years tenure and were very hurt.
 - Many didn't trust the organization.
- By the end of January, 11 specialists left, joining another health system that offered remote work, better pay, etc.

This left one CDI (Robin) and myself.



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Change of Season

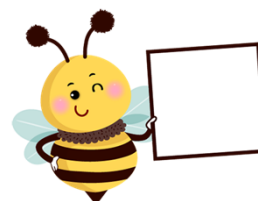
What Do We Do Now???

Holding It Together

- Being as there were only two CDI specialists left, coverage rate was going to be minimal, the manager was now going to become a reviewer
- Got the coders to query on all charts they coded
- Stopped all Quality assistance
- We spoke honestly and worked through many uncertainties and decided we would make the best of our future
- Prior to all the resignations, we had a couple open hybrid positions and no local applicants. We were limited to the locale, and a noncompete contract between Roper and Ensemble. Leadership made the decision to make the team 100% remote, thereby **opening the pool of applicants.**

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The Plan



- What did we want to hire?
- Hiring process—burned through 3 HR representatives
- First new hires (3) Feb 4th
- Next two, 2 weeks later
- Got a Floater CDI Specialist from Ensemble, to get used to our processes so Robin and I did the training, until she was up to speed.
- Ensemble hired 6 contract CDI to absorb some of the coverage reduction until we had a team.
- **In 8 months, we hired and onboarded 11 CDI Specialists—all new to CDI except one that was CCDS certified!**

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Time to Re-Plant

New Beginnings

Training

- A round-robin schedule, with start dates every few weeks.
- Started with basic principles, then built towards chart complexity
 - Medical, Cardiac, Ortho, and so on...
- **Hard coded** at first to learn the coding questions and pathways
- Leveraged every resource available.
- Support calls for
 - What did you learn this week? How did it go?
 - Hang in their calls for bootcamp

The Plan

	Week 2 (6/27- 7/1)				
	Monday	Tuesday	Wednesday	Thursday	Friday
	Day 5	Day 6	Day 7	Day 8	Day 9
7:00 AM					
8:00 AM					
8:30 AM					
9:00 AM					
10:00 AM					
10:30 AM				Dibs	
11:00 AM	Meet and Greet with CDI Manager / Team, any questions RCT. Agenda Introductions Rev Cycle orient questions Equip Workday/Teams PTO		Workday learnings, policytech document "read & Review"		Shadowing/ Case Review-- Medical Cases
12:00 PM		Workday learnings, policytech document "read & Review"			
1:00 PM				LUNCH	
2:00 PM	Workday learnings, policytech document "read & Review", WFM form completion		Group Call: Review any questions about learning/ policytech documents. Provide any additional education resources.	3M 360 Training See below	Group Call: Recap/ Q&A Complete Access Items (Onboarding Checklist) After which release to collect info, organize, read.
3:00 PM			EHR Review/ Training see below		
4:00 PM	Validate Client Access				



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The Plan

	Week 3 (7/4- 7/8)				
	Monday	Tuesday	Wednesday	Thursday	Friday
	Day 10	Day 11	Day 12	Day 13	Day 14
7:00 AM	Medical Cases				
8:00 AM					
8:30 AM					
9:00 AM	Shadowing/ Case Review	Dibs	Shadowing/ Case Review	Dibs	Shadowing/ Case Review
10:00 AM					
10:30 AM		Shadowing/ Case Review		Shadowing/ Case Review	
11:00 AM					
12:00 PM	LUNCH				
1:00 PM					
2:00 PM	Shadowing/ Case Review	Query Class	Shadowing/ Case Review	Shadowing/ Case Review	Group Call: Recap/ Q&A After which release to collect info, organize, read.
3:00 PM					
4:00 PM					



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The Plan



Week 4 (7/11- 7/15)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 15	Day 16	Day 17	Day 18	Day 19
MDC Class				
Week 5 (7/18-7/22)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 20	Day 21	Day 22	Day 23	Day 24
Medical Cases				
Week 6 (7/25-7/29)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 25	Day 26	Day 27	Day 28	Day 29
MDC Class				
Week 7 (8/1-8/5)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 30	Day 31	Day 32	Day 33	Day 34
Cardiac Cases				
Week 8 (8/8-8/12)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 35	Day 36	Day 37	Day 38	Day 39
Orthopedic Surgical Cases (THA TKA)				

Week 9 (8/15-8/19)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 40	Day 41	Day 42	Day 43	Day 44
Surgical Cases				
Week 10 (8/29-9/2)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 45	Day 46	Day 47	Day 48	Day 49
Oncology				
Week 11 (9/5-9/9)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 50	Day 51	Day 52	Day 53	Day 54
All Cases				
Week 12 (9/12-9/16)				
Monday	Tuesday	Wednesday	Thursday	Friday
Day 55	Day 56	Day 57	Day 58	Day 59
All Cases				

Save the Date for
Graduation !!

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11	12	13	14	15
Group 1 & 2 - Ortho week				
Group 3				
Meet and Greet Karen and Kelsey 0900	8:30 AM - 9:00 AM DIBs	Group 1&2 EIQ practice	8:30 AM - 9:00 AM DIBs	Team Recap--1300-1500
18	19	20	21	22
Group 1&2 Surgery				
Group 3				
Group 3 Query Class 1300-1530		8:30 AM - 9:00 AM DIBs		3M training- tips and tricks 1300-1430
8:30 AM - 9:00 AM DIBs				
25	26	27	28	29
Group 1&2 Oncology				
Group 3 CDI Class				
Group 3- LJ				
8:30 AM - 9:00 AM DIBs		Group 3 Check-in 1400-1500	8:30 AM - 9:00 AM DIBs	Team Recap 1300-1500
2	3	4	5	6
Group 1&2- Surgical				
Group 3 LJ Medical				
Group 3- CDI Class				
10:00 AM - 10:30 AM DIBs		PTO RM		

Trainer Meeting Notes 5/31/22

To regroup the trainers and Jo, to best utilize resources.

Group 3

- 6/1 Alison and LuAnn will start sending the group off and use a group chat to ask questions and put finished FINs for a trainer review. The CDI will ask for one on one assistance PRN.
- 7/13, All hands on deck for Oncology to teach! Including Robin??
- Starting 6/20 the group will be ready for all cases in which Jo will show them how to use the prioritizer and will let them make their assignments
- Jo will teach reconciliation during those last 2 weeks and allow the group to use CAC too.
- Group 3 will be done 7/1!

Group 4

- They will be in Bootcamp 6/6 through 6/17.
- 6/20 another week Ortho/Surgical
- 7/11 Group 4 will have Oncology
- They will have all cases starting 7/18, will be released to CAC and pick patients through the prioritizer.
- Reconciliation will be taught by Jo after she is back from PTO the week of 9/1.
- Officially, Group 4 will be done 7/29

Groups 3 & 4 graduation 9/5

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Trainer Meeting Notes 5/31/22

To regroup the trainers and Jo, to best utilize resources.

Group 5

- Deah will be with Jo the first week of orientation (6/27-7/1) because Alison will be finishing up with group 3.
- Going forward Alison will work with Deah.
- Her Boot Camp will be 7/11- 7/15 and 7/25 -7/29.
- Per schedule, Deah will be done 9/23.

Final Graduation will be 9/23!



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	9	10	11	12	13
	Group 1&2 All Cases				
	Group 3 Medical				
	Group 4 Medical				
	Meet Deborah, Lisa, Tami and Deb- 08	8:30 AM - 9:00 AM DIBs	Sophia with Jenny 11-12 Tyrene with Kelly 10-11	Geri with Samantha 11-12 Karla with Buffy 1130-1230 8:30 AM - 9:00 AM DIBs	Team Recap 1400-1500
	16	17	18	19	20
	Group 1&2				
	Group 3 Cardiac				
	Group 4 Medical				
	8:30 AM - 9:00 AM DIBs	Group 1&2 Reconciliation 1300-1530 Wallis PTO	8:30 AM - 9:00 AM DIBs	Reed 4 PTO pm Wallis PTO	
	23	24	25	26	27
	Group 3 Ortho				
	Group 4 Cardiac				
	8:30 AM - 9:00 AM DIBs	PTO RM	8:30 AM - 9:00 AM DIBs	Graduation Lunch Group 1&2 1230-14	
	30	31	1	2	3
	Group 3 Surgical				
	Group 4 Ortho				
	Memorial Day	8:30 AM - 9:00 AM DIBs	Query Class Group 4	Query Escalation- Robinson 8:30 AM - 9:00 AM DIBs	
	6	7	8	9	10
	3M training				
	Group 3				
	Group 4 Class				
	8:30 AM - 9:00 AM DIBs		8:30 AM - 9:00 AM DIBs		

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Watering and Feeding

Sustainability

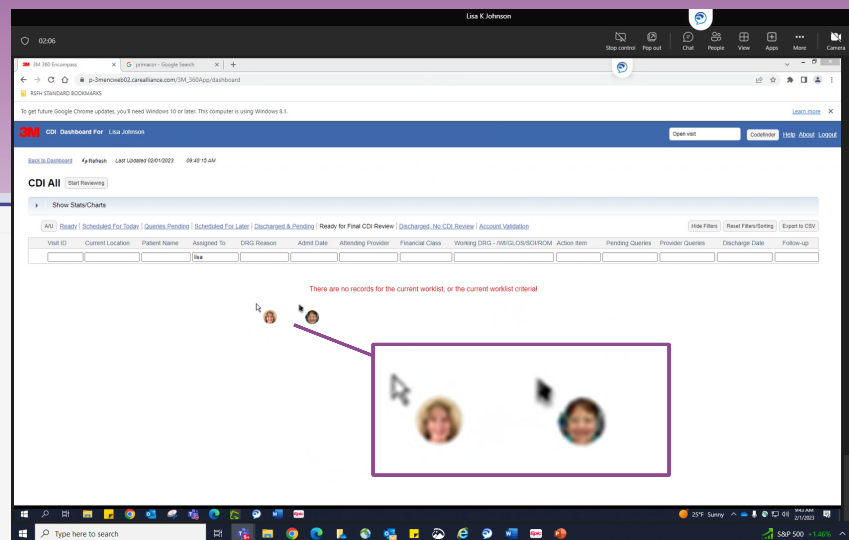
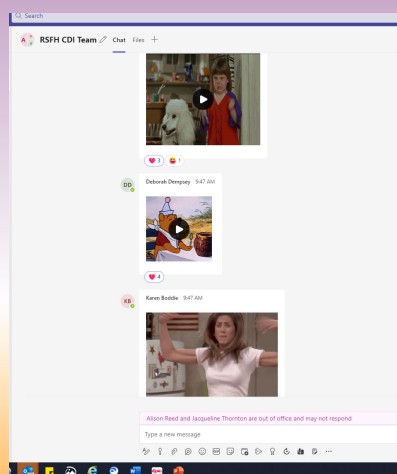
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Sustainability

- How to get/keep the remote team engaged
 - Graduations for each group
 - Lunches
 - Recognitions
 - Many, many online calls
- How to introduce the team to the Providers
 - 4 CDI are Local: brought them to the hospitals
 - Practiced with the team on mock phone calls
- How to maintain a relationship with the providers
 - Reintroduced the team
 - Working constantly on perfecting queries
- How to maintain productivity during the onboarding period
 - Broach the subject early and often
 - Explain productivity markers and expectations
 - Send frequent productivity reports, keep the individuals informed

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Leveraging Communication Platforms



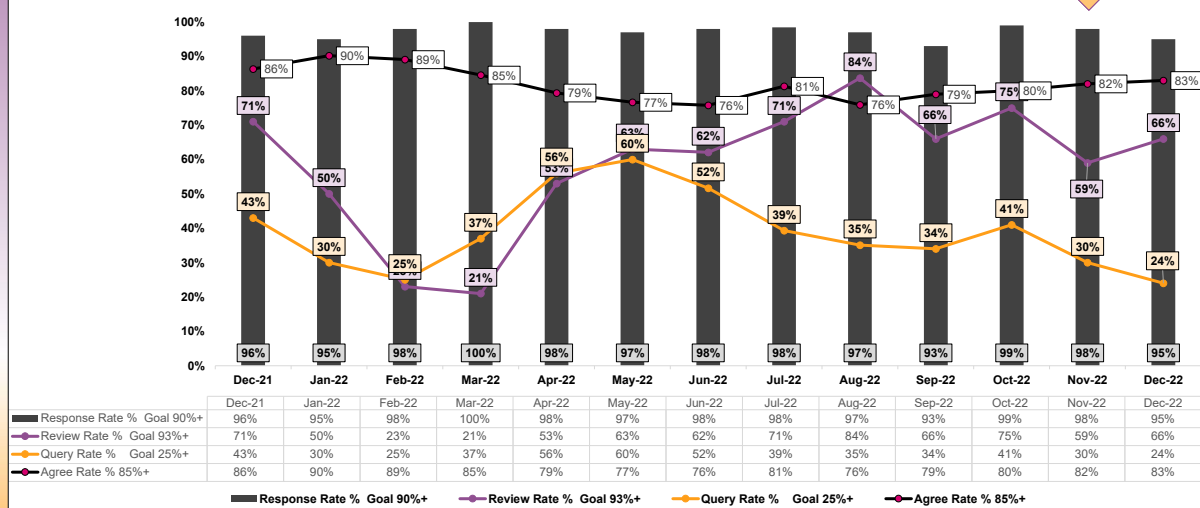
Post Onboarding: The Stretches

- Encourage production increases and goals
 - Help team with efficiencies, tricks to better reviews
- Audits to help improve individual performances
- Track hours: Why is someone always working overtime?
- Encouraging added responsibilities
 - Becoming specialty trained
 - Teaching
 - Getting involved in company or CDI activities



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Roper Clinical Documentation Metrics 2021-2022





Harvesting

Lessons Learned

Hard Lessons Learned

- As the Manager
 - **Stay positive!**
 - Start your new specialists early with data and expectations, let them get used to those
 - Celebrate the wins and give grace and support
 - **Don't be or do everything, how else can your team grow?**
 - You are hired to lead, you hired people to work with you
 - Communicate early and constantly
 - Support a team culture
- For the CDI Specialists
 - Give yourself grace
 - **Don't beat yourself up.**
 - This is a new journey, no matter if you were at the top of your game before
 - You are the owner of your career
 - Your employer is investing in you, but you are also investing in you



Lessons Learned for the Entire CDI Team

- Support each other—CDI takes many heads!
- Laugh a lot
- Leverage your chat platforms Microsoft Teams, Webex
- Be considerate of time zones



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Thank you. Questions?

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