

# flourish

CDI IN BLOOM | **acdis 2023**

**MAY 8–11, 2023**



## Physician Educator Liaison: A Tool Used to Plant a Seed to Grow Physician Relationships and Enable Engagement to Blossom

**Jonathan “Brad” Gude, PA-C, MCMSc**

*Chief Quality Officer*  
Pioneer Medical Group  
Tampa, Florida

**Jamie Johnson, RN, BSN, CCDS**

*CDI Physician Educator Liaison*  
AdventHealth West Florida Division  
Tampa, Florida

**hcpro**

**acdis**

### Presented By



**Jonathan “Brad” Gude, PA-C, MCMSc**, is chief quality officer at Pioneer Medical Group in Landolakes, Florida. He joined Pioneer Medical Group in 2016, working in both the acute hospital setting and the post-acute program, and transitioned to full-time chief quality officer in 2018, where he redeveloped the quality program. He currently oversees all acute hospital performance and post-acute performance measures, and works with the medical directors to develop and implement improvement strategies.

## Presented By



**Jamie Lynne Johnson, RN, BSN, CCDS**, is a physician educator liaison at AdventHealth West Florida Division in Tampa, Florida. She oversees physician education and engagement at 13 facilities. Her goal is to expand physician perspectives with CDI and enhance professional relationships with providers. She has developed an orientation program for new providers and standardized physician education across the division.

3

## Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
  - Describe the role and expectations of a physician educator liaison
  - List the steps to build relationships and trust between providers
  - Define how to enhance provider engagement
  - Describe a provider's perspective

4



## Creating/Defining the CDI Physician Educator Liaison Role

### Identifying the “Gap”

- Providers lack of knowledge for CDI role
- Increase in “low-hanging fruit” clarifications
- Physician frustration
- Frontline frustration
- Delayed physician response times
- Poor identification of impacting risk adjusters for mortality observed to expected ratio (O/E)
- Inconsistent education presented to providers site to site
- Funding/budget barriers

## Position Structure

### Start with “why”

- Standardize through provider orientation with introduction to CDI and explain the “Why”

### Communicate

- Give providers a voice through establishing a communication pathway

### Educate

- Standardize consistent education each month and provide customized education for specialty departments

### Feedback

- Provide monthly feedback through metrics for growth and adjustments

### Recognize

- Recognize providers for their excellent documentation and collaboration

### Continue collaboration

- Continue collaboration with providers to enhance peer accountability and engagement



## Building Relationships and Trust Between Providers

## Laying the Foundation to Build Relationships

- Introduction
  - Introduce yourself and the role face to face
  - Handout business card and contact information
  - Create a “Get to Know Me” table in provider lounge
- Establish a presence
  - Make frequent in-person visits and follow ups
  - Visit sites weekly and attend MDR’s to be visible
  - Connect with site-based executive members for endorsement (CEO, CMO, CNO, medical directors) and make sure they know when you’re onsite
  - Meet with physician advisors for support and to strengthen relationships
  - Meet department directors, managers, clinical coordinators (chest pain, heart failure, sepsis)
  - Stop in to say hi to everyone and anyone



9

## Building Communication and Trust

- Explain the “why” and direct impact of clinical documentation
  - Purpose of CDI?
    - Improve understanding and compliance of Medicare rules and regulations
    - Improve understanding of the impact of clinical documentation
    - Provide support to translate clinical knowledge into codable terminology to accurately reflect clinical acuity, severity of illness (SOI), and risk of mortality (ROM)
  - Personal impact for provider
  - Regional impact for physician group



10

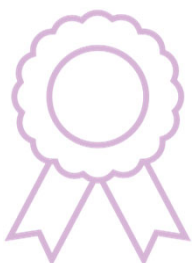
## Building Communication and Trust (cont.)



- Explain “how” clinical documentation provides support
  - Request for specific additional documentation based on the records’ current clinical findings, risk factors, and treatment
  - Request clarification of documentation
  - Face to face conversations with providers to discuss the provider’s intent and clinical process and help translate the results into an accurate depiction of the patient’s complex care
- Promote communication
  - “What can I help you with?”
  - “I am here to give you a voice.”
  - “If I don’t know the answer, I will help find someone who does.”
- Establish open-door environment
  - “Please call me anytime!”
  - Send messages that you’re onsite if anyone needs assistance or has questions

11

## CDI Physician Champions



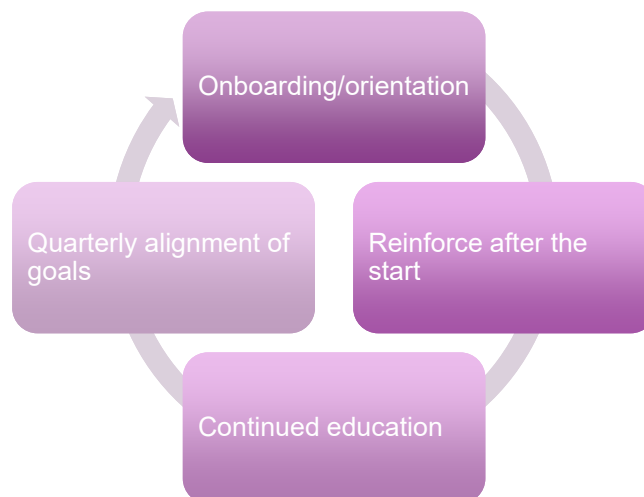
- Peers leading peers
- Help the providers “own” their process
- Select a representative for each site to help:
  - Peer-to-peer accountability
  - Peer-to-peer communication
  - Presentation of monthly education
  - Representation at each site for quality and patient outcome questions
  - Collaboration to co-present to other organizations and departments

12



## Education Enhancement

## Standardizing Education



## Standardizing Education

- Provider onboarding/orientation to CDI
  - One-on-one sessions (virtual or in-person)
  - Standardizing information given at onsite provider orientation
  - Customizing orientation to reflect direct position impact (admitting, attending, consultant)
  - Reviewing common clarification opportunities and CMS guidelines
    - Documentation of acuity and specificity
    - Specification of organisms
    - ASPEN criteria



15

## Standardizing Education

- Reinforcement on the floor
  - Providers receive a lot of information at onboarding
  - The importance of CDI to the provider may be overlooked
  - Close follow-up within a month of start is important to reinforce CDI education points
  - Review of the CDI process, completion of queries, and importance of query impact
  - Requesting feedback from the provider



16



## Standardizing Education

- Monthly education
  - Can combine with monthly provider meetings
  - Intentional focus with examples
  - Teach available resources to providers
  - Customize topics to sites and specialty groups

Working Review			Possible Review		
DX	DESCRIPTION	POA	DX	DESCRIPTION	POA
J15.6	Pneumonia due to other Gram-negative		J15.6	Pneumonia due to other Gram-negative	Y
Add New			Z68.41	Body mass index (BMI) 40.0-44.9, adult	E
			E66.01	Morbid (severe) obesity due to excess	Y
MS DRG: 179 - RESPIRATORY INFECTIONS & INFLAMMATIONS W/O CC/MCC			MS DRG: 178 - RESPIRATORY INFECTIONS & INFLAMMATIONS W CC		
MDC: 04 - DISEASES & DISORDERS OF THE RESPIRATORY SYSTEM			MDC: 04 - DISEASES & DISORDERS OF THE RESPIRATORY SYSTEM		
AMLOS: 3.8			AMLOS: 5.1		
GMLOS: 3.1			GMLOS: 4.2		

Case 1	Case 2	Case 3
Pneumonia	Gram negative PNA	Gram negative PNA
AMS	AMS	Metabolic encephalopathy
SOI/ROM: 1/1	SOI/ROM: 1/1	SOI/ROM: 2/2
GMLOS: 2.5	GMLOS: 3	GMLOS: 5.4

17

## Standardizing Education

- Quarterly alignment of goals
  - Performance trends
  - Targeted intervention strategies when needed
  - Bidirectional feedback
  - Education topic planning
  - Review of planned or new coding changes



18



## Giving Recognition

### Physician and APP Recognition

- Recognition at site-based level
  - Monthly selection by frontline teams
- Recognition at divisional level
  - Quarterly selection by CDI divisional leadership and chief clinical officer



## Creative Ways to Recognize Providers

- Certificate of Achievement
  - Marketing/logo approval
- Formal certificate frame
- Candy/individual snacks/donuts
- Card/balloons
- Donations from the foundation and marketing departments
  - Water bottles
  - Phone charges
  - Notebooks
  - Pens
  - Totes
  - Shirts



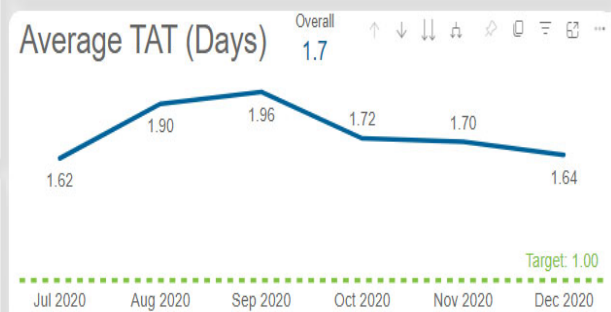
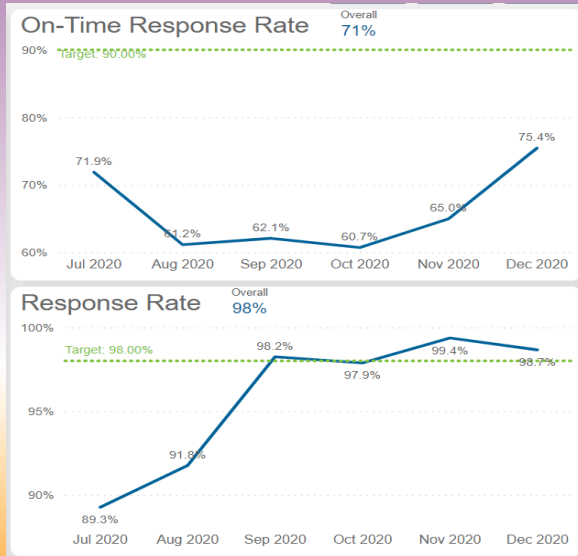
21

**flourish**  
 CDI IN BLOOM | **acdis 2023**

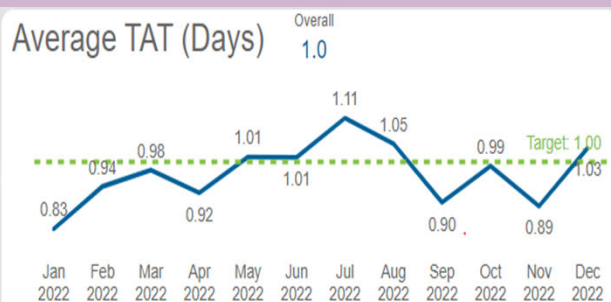
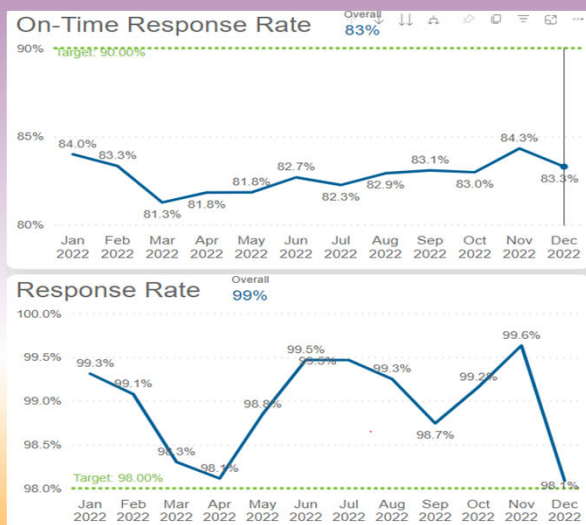


## Impacting Metrics and Unexpected Outcomes

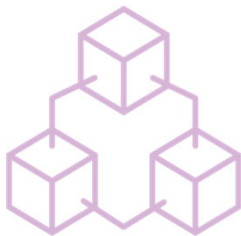
## Before Physician Educator Liaison Role ( )



## From Start to Present of Physician Educator Liaison Role (March 2021– December 2022)



## Unexpected Outcomes



- CDI education has led to increased presence both within the organization and with our organizational partners providing our CDI service with a greater reach and impact
  - Invitation to present monthly at divisional department meetings
  - Participate in executive steering meetings throughout the region
  - Invitation to collaborate and present at family and internal medicine residency programs
  - Invitation to present and audit case reviews for private specialty groups for mortality O/E impact
- Collaborate with providers for their CMEs
  - Physician leadership certification project
- Providers reaching out

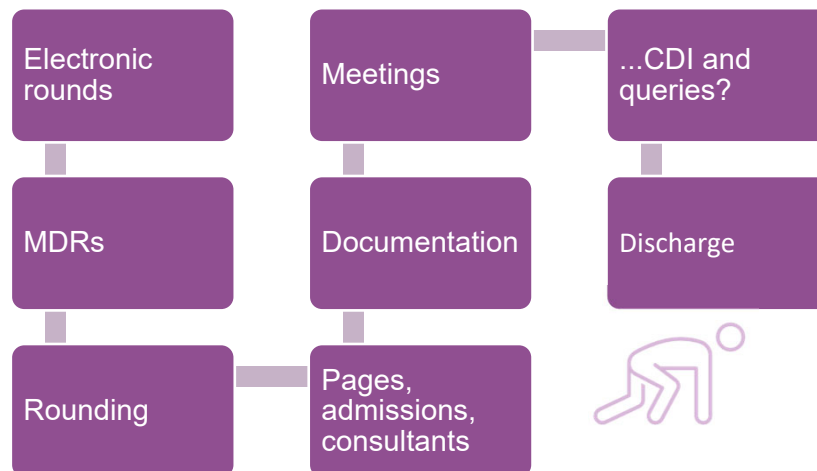
25

**flourish**  
 CDI IN BLOOM | accdis 2023



## Understanding a Provider's Perspective

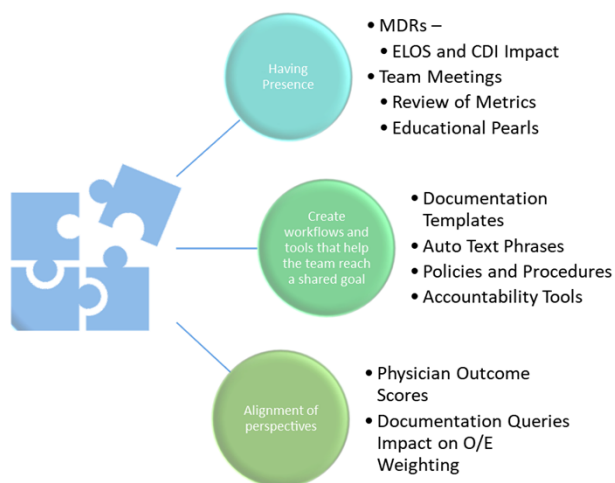
## Provider Daily Workflow



"Is CDI viewed as an interruption or an assistance?"

27

## Building a Relationship Between Providers and CDI



28

- Established policies and procedures agreed upon by both the physicians and the CDI team allow for smooth collaboration.
- These guidelines ensure that there are set expectations on when queries will be received and when they will be completed to limit interruptions.

29

- Tracking tools enable us to work collaboratively to determine areas of opportunity by campus, condition, or provider.
- This information is shared during team meetings with providers and helps us to target monthly education to our teams.

30



## How Documentation Impacts Providers

- Maintaining alignment with facility goals
  - CMS Star Rating, *Leapfrog* Safety Grade, etc.
- Physician/physician group performance
  - Third party risk adjusted quality outcomes
    - Readmissions, mortality, length of stay, cost per case, glycemic management
  - Risk adjustment factor (RAF) scoring, SOI, ROM
- Reinforcing physician group value
  - Documentation impacts calculated performance
  - Justifying subsidies
  - Reinforces partnership through performance awareness
  - Contract negotiations



31

**flourish**  
 CDI IN BLOOM | accdis 2023



## Thank you. Questions?

[Gude-jgude@pioneermedicalpl.com](mailto:Gude-jgude@pioneermedicalpl.com)  
[Jamie.Johnson@adventhealth.com](mailto:Jamie.Johnson@adventhealth.com)

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.