

# flourish

CDI IN BLOOM | **acdis 2023**

**MAY 8–11, 2023**



## **Flourishing by Design: Building Organizational Structure and Partnerships for a Flourishing CDI Department**

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### **Presented By**



**Jessica Risner, BSN, RN, CCDS**, is the senior director of CDI and clinical denials at Banner Health based in Phoenix. With oversight of 29 hospitals in six states, she leads a dedicated team of 135 professionals in the pursuit of concise documentation that appropriately reflects patient acuity, risk of mortality, and resource utilization. She is an active member of the ACDIS Leadership Council and has been published in both *CDI Leadership Insider* and the *CDI Journal*, as well as appearing on the *ACDIS Podcast*, conferences, and webinars.

## Presented By



**Beth Simms, BSN, RN, CCDS**, is the CDI and acute care coding program manager at Banner Health in Mesa, Arizona. She supports the CDI and acute coding department with data analytics, basic IT support, coordination of projects with the internal IT team and vendor support, development of workflows, and staff education related to workflows and IT solutions.

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## Learning Outcomes

- At the completion of this educational activity, the learner will be able to:
  - Discuss the healthcare and industry changes that affect CDI
  - Describe how an expanding healthcare system affects CDI
  - Explain how to design organizational structure to flourish during change

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**CDI departments are subject to many forces of change:  
CMS, internal stakeholders, technology, and staff.**

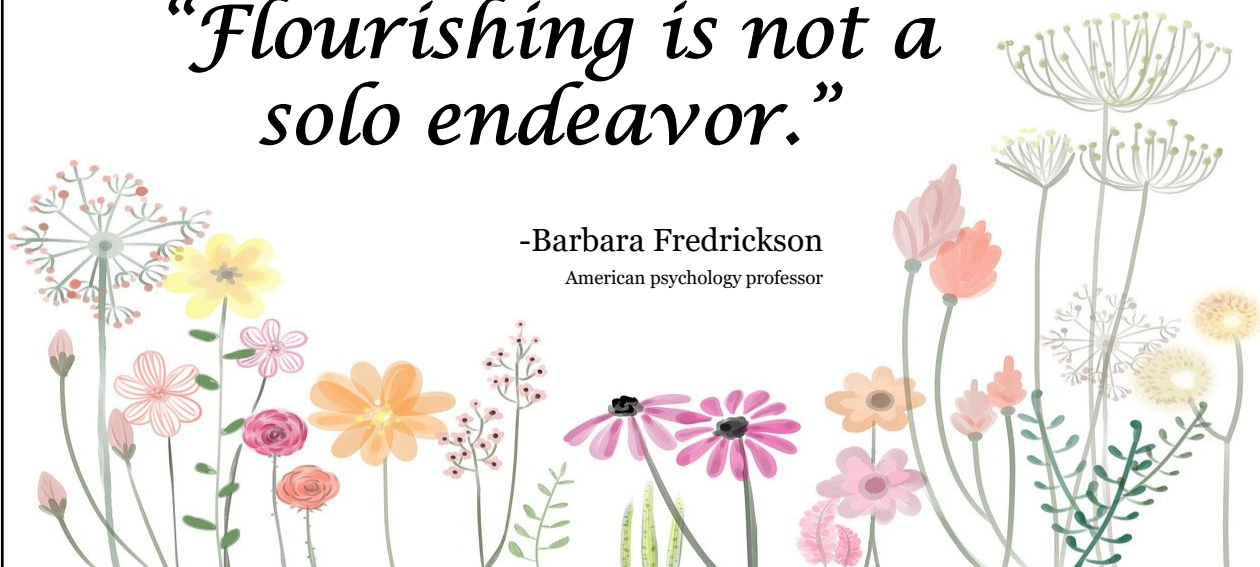
**How do you keep up with the pressures  
of regulations and change to position your  
department to  
*flourish?***



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*“Flourishing is not a  
solo endeavor.”*

-Barbara Fredrickson  
American psychology professor





## Banner Health at a Glance

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- One of the largest nonprofit hospital systems in the country.
- With more than 50,000 employees we are the largest private employer in Arizona and third largest employer in Northern Colorado.



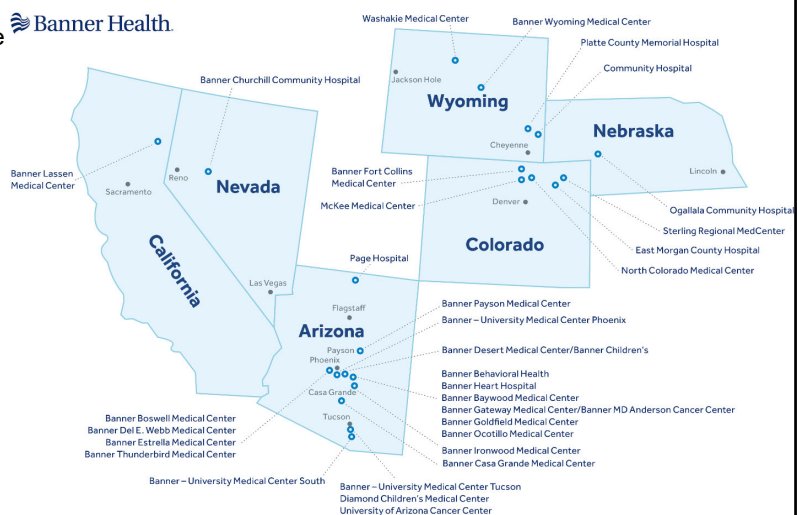
### Acute

- Academic Medical Centers
- Urban Hospitals
- Rural Hospitals
- Children's Medical Center
- Behavior Health Hospital
- Heart Hospital



### Post-Acute

- Inpatient/Outpatient Rehabilitation
- Skilled Nursing Facility
- Home Health
- Hospice and Palliative Care
- Home Infusion
- Home Medical Equipment



## Mission Statement



Making health care easier,  
so life can be better.

## CDI Department

Facilitate concise clinical documentation to appropriately reflect patient acuity, risk of mortality, and resource utilization in order to properly reflect patient care given and optimize organizational goals.

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## Raise-Your-Hand Question

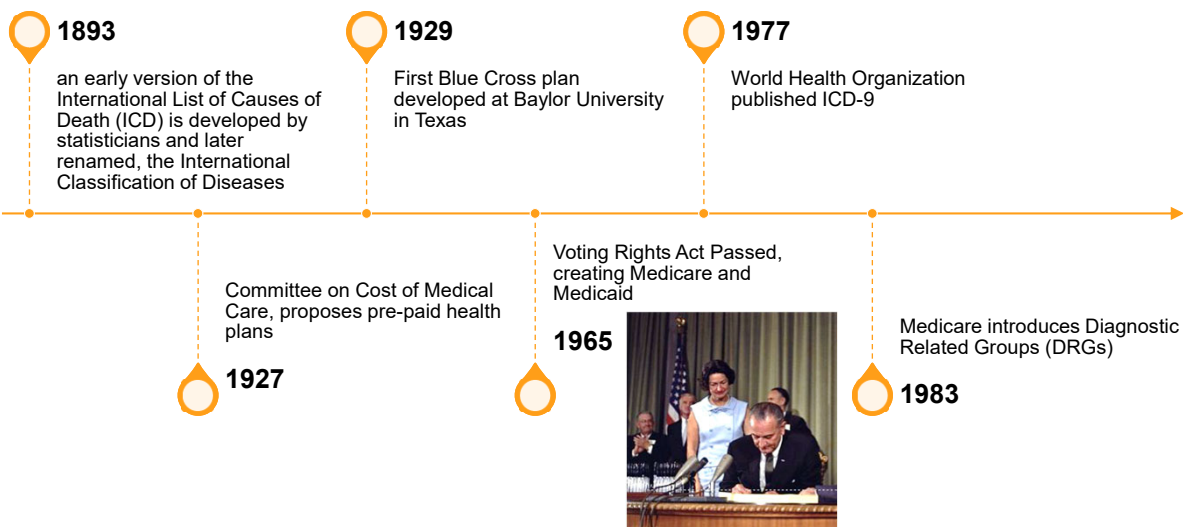
What type of changes impact the CDI world?

- A. Development of EMR
- B. Analytic software (Excel, Tableau, PowerBI)
- C. ICD and DRG development
- D. All of the above

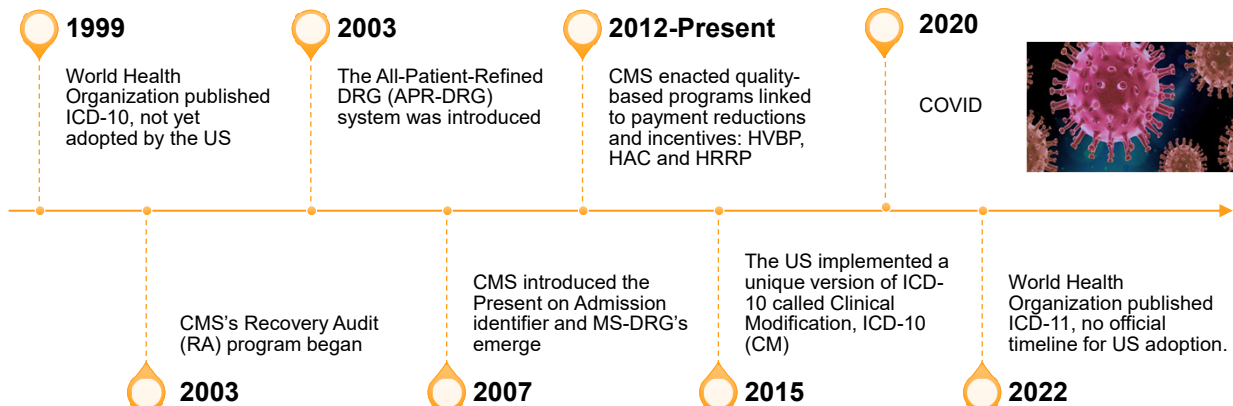


## Healthcare and Industry Changes That Affect CDI

### A Brief History of Insurance and Coding in the United States

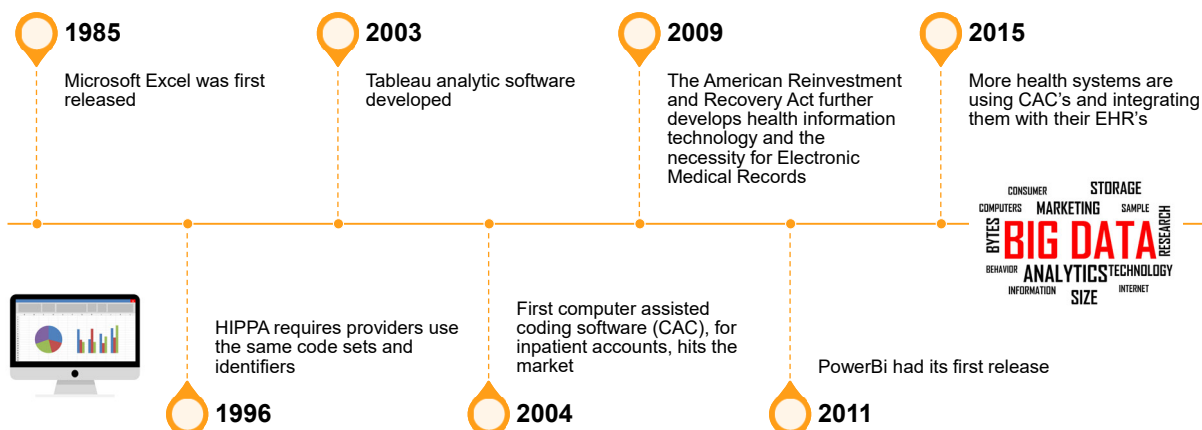


## A Brief History of Insurance and Coding in the United States (cont.)



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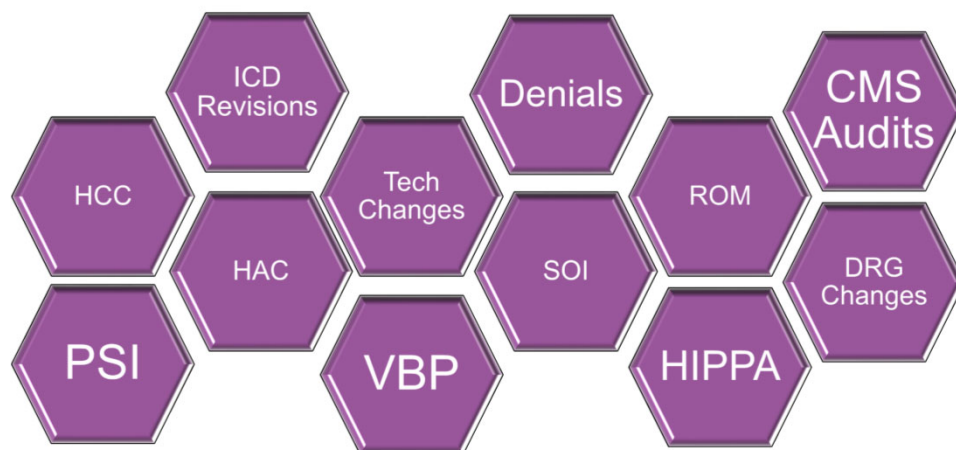
## Healthcare Technology and Analytic Changes



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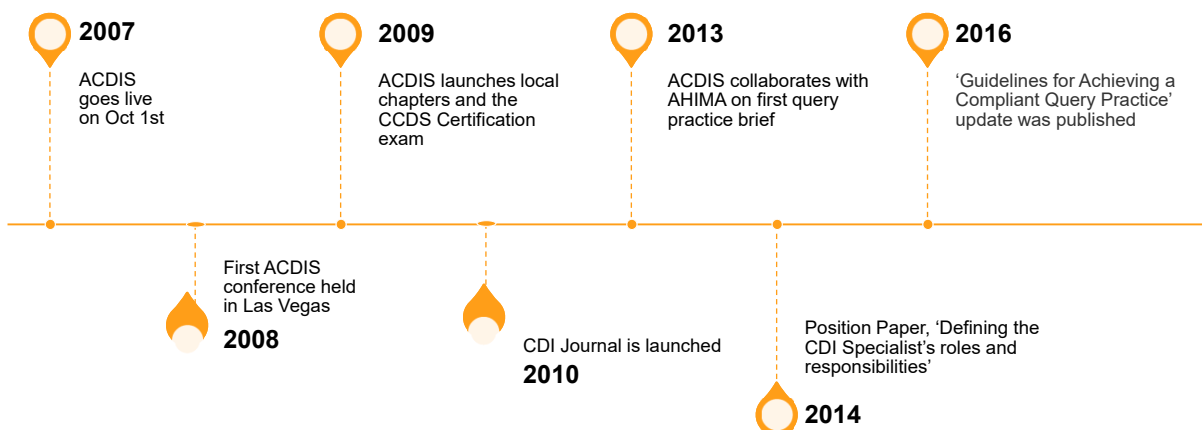


## With So Many Rules, Who Offers Guidance and Ensures Compliance...



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## An Emerging Industry: A Brief History of ACDIS and Best Practice Resources



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## An Emerging Industry: A Brief History of ACDIS and Best Practice Resources

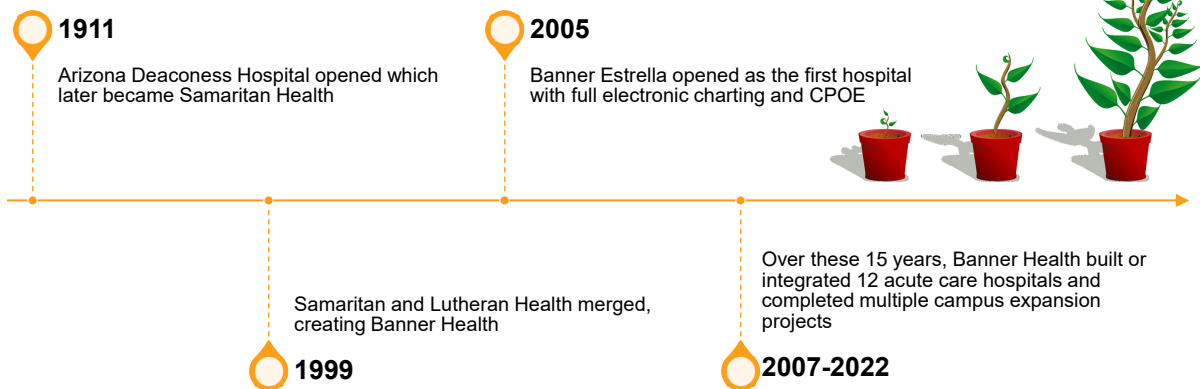


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## How an Expanding Healthcare System Affects CDI

## CDI Department Changes

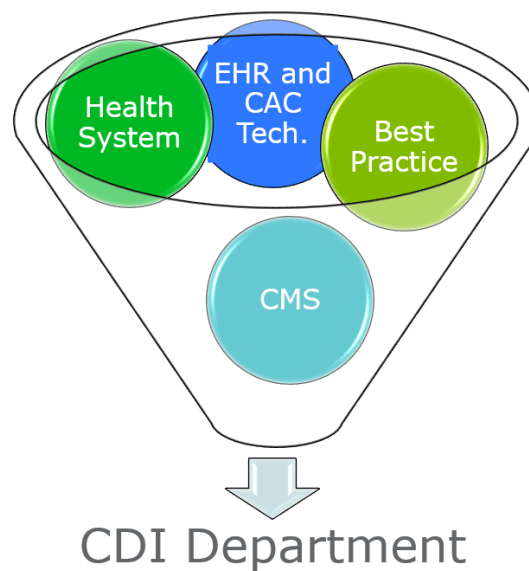


**That's an approximate growth rate of 42% and a current state of 5,500+ acute care beds...that all need a CDI review!!!**

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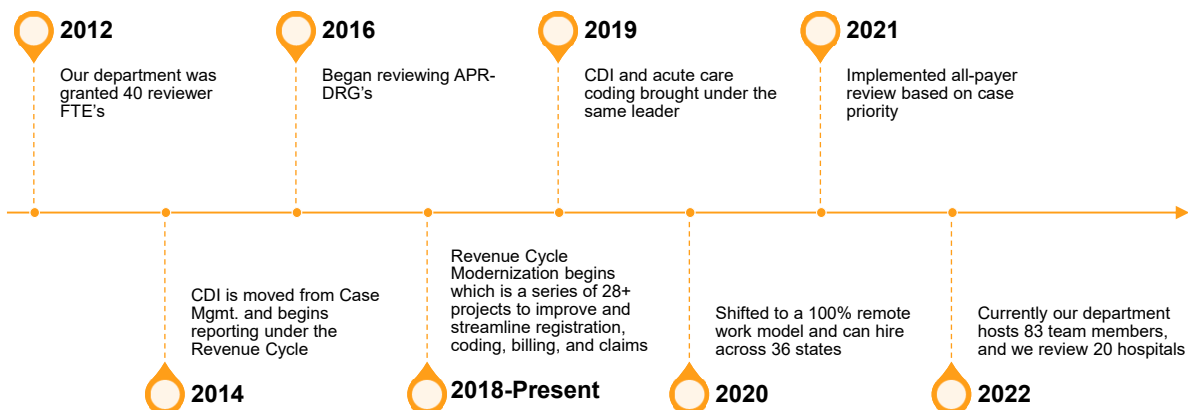
## Now What?

How does a CDI Department flourish against so much change and role expectation?



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## CDI Department Changes



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## How to Design Organizational Structure to Flourish

## Evolution of Our Department

### 2014

- Director: 1
- Operation Leaders: 2
- CDI Reviewers: 60
- Reports to: Case Mgmt.

### 2019

- Director: 1
- Operation Leaders: 3
- Educators: 2
- CDI Reviewers: 66
- Reports to: Rev. Cycle

### 2022

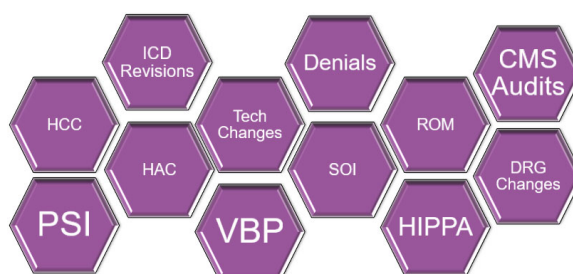
- Senior Director: 1
- Operation Leaders: 4
- Quality and Ed. Leader: 1
- Educators: 3
- Auditors: 3
- CDI/ACC Program Mgr: 1
- CDI Reviewers: 70
- Reports to: Rev. Cycle

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## Evolution of Our Department

- We partnered with HR and executive leadership on each step of our evolution.
- We used our companies' values, government healthcare changes and regulations, along with industry best practice and technology advances, as guides and evidence to show how our proposed department design and roles were needed.

Courageously Innovate  
Relentless Improvement  
Disciplined Focus  
Foster Accountability  
Customer Obsessed  
Continuously Earn Trust



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## Operational Leadership: Associate Directors (4)

**Each leader is assigned 'home' hospitals. They have oversight of the covering CDI team and work directly with hospital stakeholders, practice managers, and physicians.**

- Each leader has 17-19 direct reports
- Specialized reviews (PSI, mortality, or LOS) in coordination with Quality and Coding
- Coordinates provider education with physician leadership
- Monitors and reports team and provider metrics

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## Associate Director of Quality and Education (1)

**Oversees all aspects of quality and education, ensuring we remain aligned with compliance and industry best practice.**

- Manages our audit and education teams
  - 3 Educators
  - 3 Auditors
- Attends system level meetings to provide education and support
- Collaborates on department and company policy and procedure
- Partners with Coding and Quality departments
- Owner of our provider education library and CDI education resources

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## Auditors and Educators

### CDI Auditor (3)

- Completes monthly and quarterly quality audits to ensure queries and workflow carried out by staff are within compliance
- Assists with focused chart audits from stakeholders
- Reviews post bill documentation recommendations from safety net vendor
- Helps with onboarding and training new reviewers as needed

### CDI Educator (3)

- Creates and maintains all educational materials and query templates for staff and physicians
- Replies to questions sent to the education email address
- Hosts frequent education meetings for both staff and physicians
- Provides quarterly coding clinic education and administers our yearly core competency model and exam
- Virtually onboards and trains new reviewers

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## CDI and Acute Care Coding Program Manager (1)

### History of Role Development:

- Supported by the modernization initiative within the Rev Cycle
  - Increasing technology complexity, types, and uses
- Needing a dedicated liaison between CDI, IT, and vendors
  - Allowing leaders to focus on core duties
- Increasing demand for reports and data analytics

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## CDI and Acute Care Coding Program Manager (1)

### Core Functions:

- Close collaboration with CDI and Coding leaders, IT, and vendors
- Assists with transition, building, and maintenance of CAC, EHR interfaces, registration, and billing programs
- Tests and monitors IT updates
- Collaborates with leaders to develop CAC workflows for staff
- SPS maintenance of non-education areas
- Builds, runs, and maintains data reports and assists in analytics
- Ability to troubleshoot minor IT issues, without contacting the IT department
- Manages IT equipment ordering and return

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## CDI and Acute Care Coding Program Manager

During network events, we often get asked the following question:

### What do you see as qualifications and desired traits for this role?

Experience working in CDI or Coding

- Background or strong interest in IT
- Working knowledge of software programs and self-driven to fill in knowledge gaps
- Additional skills:
  - Project management
  - Problem analysis
  - Ability to partner with diverse stakeholders and teams
  - Conflict resolution
  - Communication: written and verbal
  - Data analytics/analysis

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## CDI Reviewer (70)

**Registered nurses and trained physicians that complete concurrent and retrospective review of adult inpatient admissions at acute care hospitals.**

- 100% remote and can live in 30 plus states
- Formal provider education is not a part of this role
- 12 hours of CEU time a year
- Daily productivity metrics:
  - 8 initial reviews
  - 12 subsequent reviews
  - Discharge reviews encouraged but no target
  - 26% query rate, achieved avg. is 37%
  - Focus of review includes:
    - reason for admission, severity of illness, mortality, PSI/HAC, HCC, and denials prevention

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## CDI Reviewer (70)

To help our staff align with industry best practice and updates:

- We provide ACDIS membership for all staff
- We encourage staff to include the below goal in their performance evaluations:

During the next year, (*name*) will continue to focus on professional development. To better align with industry updates, best practices, and the Revenue Cycle strategic goals, the CDI professional will pursue educational opportunities obtained through ACDIS, AHIMA, or CAC vendor sources.

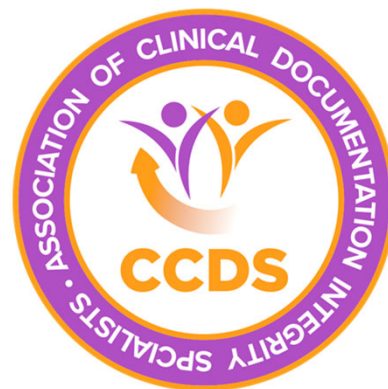
- ☐ **Meets:** To achieve a 'Meets', one must obtain **4 CEUs**. To be achieved by December 31st.
- ☐ **Exceeds:** To achieve an 'Exceeds', one must obtain **6 CEUs** by December 31<sup>st</sup> and present via Power Point in a Team, Department or Education meeting on a CEU topic.
- ☐ **Extraordinary:** To achieve an 'Extraordinary', one must accomplish the Exceeds goal along with one of the following to be achieved by December 31st:
  - ❖ **Speak** at a local or national industry related meeting/conference . Presentation must be approved by manager prior to submitting for the event.
  - ❖ **Submit to be published** in an industry related journal. Article must be approved by manager prior to submission.
  - ❖ **Submit to present at ACDIS/AHIMA conference**, either a poster or talk. Must be submitted by August and have approval prior by manager

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## CCDS Certification

We also host CCDS study groups and pay for the CCDS examination fee


- Our current CCDS credential rate:
  - Our senior director (1)
  - All associate directors (5)
  - All auditors (3)
  - All educators (3)
  - Our program manager (1)
  - And 22 CDI reviewers with more scheduled to test this year!



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## Building Partnerships and Other Tools for Long-Term Success

Banner Connect > Health Information Management Services > Clinical Documentation Improvement (CDI)


## Clinical Documentation Improvement (CDI)

### CDI Department

**Mission Statement:** Facilitate concise clinical documentation to appropriately reflect patient acuity, risk of mortality, and resource utilization in order to properly reflect patient care given and optimize organizational goals.


**Who we are and what we do:**  
Our centralized department is comprised of registered nurses and trained physicians who review adult inpatient cases to facilitate the accurate representation of patient clinical status and care provided.

The convergence of clinical care, documentation, and coding processes is vital for accurate Provider and Hospital profiling, severity of illness/risk of mortality, length of stay, medical necessity, denials prevention, and informed decision-making to support high-quality patient care.

Documentation clarifications (queries) are sent to Providers via Cerner and are part of the legal medical record.

**Best practice documentation tips:**

1. Specify acute vs chronic
2. Relate diagnoses to a cause
3. State if the diagnosis was present on admission
4. Document all diagnoses suspected, treated and monitored; when/if they resolve
5. Include supporting clinical indicators




## Our Intranet Page

Our Banner Connect intranet page highlights our mission and offers links too:

- Provider education library
- Data reports
- Contact information

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## CDI Department SharePoint Site

**Main CDI Department SPS:**

- Resources: workflows, policies, facility information, IT tip sheets
- Staff and physician performance data
- Department/Facility KPI
- Provider education: presentations, tip sheets, and handouts
- Query Templates: 120+

**CDI Team Education SPS:**

- CDI specific education materials
- Orientation and classroom materials
- Links to industry sites such as CMS and AHRQ

**Joint SPS:**

- Shared site between CDI and ACC
- Tracks joint projects, data, and policies

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## Partnerships

As in any hero movie, it takes the team to win.  
So, get out there and find your partners outside of your department!

Coding, Quality, Physician Leadership, Informatics,  
PAS/PFS, IT, HR, Growth and Strategy, Compliance,  
Practice Mgt, Case Mgt, the list is endless...

but the more partners you have the more  
your department can

*flourish.*



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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.

## References in Brief

- [Health Care Timeline – Health Over Profit](#)
- [Untitled Document \(kff.org\)](#)
- [ACDIS |](#)
- [Computer Assisted Coding | EMscribe® | CAC | NLP \(artificialmed.com\)](#)
- CDI Complete Training Guide from ACDIS
- CCDS Exam Study Guide