



ACDIS Pre-Conference: May 19-20, 2019

CDI Management Essentials

Effective management of a CDI department is not for the faint of heart. It requires knowledge of audit and compliance initiatives, metrics, and the revenue cycle, balanced with the hard to learn “soft skills” of staff management, including onboarding and training, developing career ladders, and change management. It also requires knowledge of how to build a business case for smart expansion into new service lines.

The CDI Management Essentials pre-conference event will help you learn the skills to become a better manager, improve hospital and department performance, and increase the satisfaction and retention of your valuable CDI staff reviewers.

CDI Management Essentials includes a blend of instruction by CDI Boot Camp educators who have managed successful CDI departments in the past, and bring best practices coalesced from organizations around the nation. You’ll also hear from two case studies from the trenches, straight from the directors of two high-performing CDI programs at Novant Health and OhioHealth.

Learning objectives

At the conclusion of this program, participants will be able to:

- Describe the function and focus of audit and compliance initiatives impacting CDI
- Identify critical metrics needed to measure department, CDI staff, and physician performance
- Apply best practices for effectively managing CDI staff
- Describe and apply best practices for department management employed at Novant Health
- Describe and apply best practices for department management employed at OhioHealth

Agenda

Day 1: Sunday, May 19, 2019

Laurie Prescott, Allen Frady

7:00 A.M.—8:00 A.M.: Registration and Breakfast

8:00 A.M.—10 A.M.: **Introduction, revenue cycle, and audit initiatives**

- Discussion of the challenges of managing CDI functions
- Describe the function and focus of the following audit initiatives
 - Comprehensive Error Rate Testing
 - Recovery Auditors
 - Program Safeguard Contractors and Zone Program Integrity Contractor
 - Office of Inspector General
 - Medicare Administrative Contractor

- Quality Improvement Organization
- Supplemental Medical Review Contractor
- Commercial Audit
- Risk Adjustment Data Validation

10:00 A.M.—10:15 A.M.: Break

10:15 A.M.—11:00 A.M.: **CDI metrics**

- Discuss key CDI metrics that support success and/or progress of a CDI department, individual CDI specialists, and participating physicians.
- Identify how metrics can be used to evaluate:
 - CDI productivity and effectiveness
 - Provider engagement
 - Educational needs
 - Staffing needs
- Identify measures to evaluate CDI organizational impact
- Demonstrate ability to interpret graphs and data related to CDI practice

11:00 A.M.—12:00 P.M.: **Managing your staff**

- Discuss the skill sets and personality traits of desirable CDI specialists
- Identify items to be included within a CDI specialist job description
- Discuss the planning and implementation of an interview
- Identify steps needed to develop a thorough and complete training plan
- Apply the concept of career ladders to CDI specialists
- Identify methods of competency assessment/employee performance assessment
- Discuss the pros and cons related to remote CDI practice
- Identify policy considerations related to the management of remote staff

12:00 P.M.—1:30 P.M.: Lunch (provided)

1:30 P.M.—3:00 P.M.: **Directing your department**

- Identify key departmental policies related to CDI
- Discuss specific job roles related to CDI and their responsibilities
- Discuss CDI reporting structures and communications within an organization
- Discuss opportunities and methods related to provider engagement
- Identify considerations applied to managing across several facilities

3:00 P.M.—3:15 P.M.: Break

3:15—4:45 P.M.: **CDI expansion: Managing change**

- Discuss the many possible foci of a CDI program
- State the importance of a clear, defined departmental mission
- Discuss the negative impact of “doing it all”
- Demonstrate how to use a mission statement to evaluate needs related to growth and expansion of the CDI department
- Discuss how to communicate your concerns related to expansion of your present responsibilities

4:45 P.M.—5:00 P.M.: **Open Q&A**

5:00 P.M.—Adjourn

5:00 P.M. —6:00 P.M.: **Leadership and Management Reception** (Sponsored by Optum360)

Day 2: Monday, May 20, 2019

Abby Steelhammer, Novant Health; Tonya Motsinger, OhioHealth

7:00 A.M.—8:00 A.M.: Registration and Breakfast

8:00 A.M.—9:00 A.M.: **Management across multiple facilities**

- Structure, methodology and approach
- Quality collaboration as it relates to establishing priorities

9:00 A.M.—10:00 A.M.: **CDI educator role**

- Development of educational pathway to facilitate individual, team, and provider education across a system

10:00 A.M.—10:15 A.M.: Break

10:15 A.M.—11:00 A.M.: **Supporting CDI program growth and development**

- Spotlight on women's services assessment: implementation and impact of CDI expansion into OB-GYN

11:00 A.M.—12:00 P.M.: **Life beyond consulting: Steps to a self-sustaining CDI program**

- Development of meaningful metrics aligned with organizational goals
- CDI involvement in EHR integration
- Change management and resilience strategies

12:00 P.M.—1:30 P.M.: Lunch (provided)

1:30 P.M.—3:00 P.M.: **OhioHealth CDI program: Managing expectations and growth**

1. Facility-based to system-based approach
 - a. CDI competencies
 - b. Standard work
 - c. Internal team development
 - d. Professional growth
 - e. CDI role expansion
 - f. Provider engagement
2. CDI informatics role
 - a. Process improvement
 - b. Expansion
 - c. Reporting
 - d. Analytics and validation
 - e. Interdepartmental collaboration

3:00 P.M.—3:15 P.M.: Break

3:15—4:45 P.M.: **OhioHealth CDI program (cont.)**

3. System collaboration
 - a. Education through project work

- b. Associate satisfaction
- c. System team development
- d. Leadership engagement
- e. Vendor alignment
- f. Upward management

4:45 P.M.—5:00 P.M.: Open Q&A

5:00 P.M.—Adjourn

Speakers



Allen Frady, RN, BSN, CCDS, CCS, is a CDI Education Specialist for ACDIS and HCPro in Middleton, MA. Frady teaches clinical documentation improvement boot camps and serves as a subject matter expert. He is an accomplished consultant with a background in coding and documentation. His experience includes 12 years as a coding consultant, two years as a coding director and six years as a CDI consultant. His nursing experience includes work as a case manager and in cardiovascular care in ICU and telemetry.



Tonya Motsinger, MBA, BSN, RN, is the system director of CDI for OhioHealth in Columbus, OH. Motsinger began her nursing career in 1985 after graduating from Bowling Green State University. Her nursing clinical background includes med/surg, critical care, and ED. She earned her MBA from Capital University in 1994. Motsinger has held multiple administrative roles and spent four years in quality, where she led several system initiatives. She entered the CDI sphere in 2011. OhioHealth currently reviews patients at eight facilities and is expanding to all payer, ambulatory, outpatient, observation, and ED areas.



Laurie Prescott, RN, MSN, CCDS, CDIP, CRC, is the CDI education director for ACDIS and HCPro in Middleton, Massachusetts, an instructor for the CDI suite of boot camps, and a subject matter expert for ACDIS. She serves on the ACDIS Advisory Board and the CCDS and CCDS-O certification committees. A frequent speaker for webinars and the author of *The CDI Specialist's Complete Training Guide*, Prescott has been in the nursing field since 1985 and developed a CDI program at her facility prior to joining HCPro in 2013. Her experience also includes specialization in the role of compliance officer.



Abby Steelhammer, MBA, MHA, RN, is director of clinical documentation excellence at Novant Health, a multi-facility system based in Winston-Salem and Charlotte, North Carolina. She's dedicated over 20 years to the healthcare industry, working in settings including trauma, critical care, rehabilitation, and case management. She became involved with clinical documentation at Novant Health 10 years ago, when asked to co-chair a committee that was standardizing acute care nursing documentation in preparation for EHR integration. Through this experience, she developed an interest and enthusiasm for the work, which led to her role in clinical improvement, implementing CDI in 2008. During Steelhammer's tenure, the program has grown to encompass a systemwide team of dedicated, certified, and quality-motivated specialists that embrace a service line approach and strong provider relationships.



Sharne Brodie, RN, CCDS, is a clinical documentation improvement (CDI) education specialist for ACDIS, a Simplify Compliance brand, in Middleton, MA. Brodie serves as a full-time instructor for CDI Boot Camps and a subject matter expert for ACDIS. She has more than 35 years' experience in the healthcare industry, including multiple areas of nursing, serving in a variety of roles at both large academic and small community hospitals. Prior to joining ACDIS, Brodie worked as a consultant providing program audits, implementation advice, and continuing education for CDI departments—including physician education—in various healthcare facilities across the country. She has been responsible for the successful implementation and oversight of a CDI department and the revitalization of a CDI department at a small community hospital.

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