Revive Your CDI Program in Five Steps

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By Mary Butler

The pressure healthcare providers—especially physicians—are currently facing with healthcare reforms and reimbursement changes should be cause for reflection, from the durable medical equipment supply chain to clinical documentation improvement (CDI). With the state of healthcare reform in flux and payment programs like MACRA looming, health information management (HIM) departments would be remiss if they didn't re-evaluate what's working in CDI.

At this year's Clinical Documentation Improvement Summit: Advancing the Documentation Journey, taking place July 31 to August 1 in Washington, DC, SCL Health's CDI and data governance director Sandra Pearson, MHA, RHIA, CHDA, CPEHR, will be discussing how her organization re-energized its well-established CDI program after a third-party assessment.

Prior to undergoing an outside assessment, Pearson says the CDI program her organization had in place was humming along. CDI specialists were comfortable—they were able to respond to chart reviews for things like core measures, and mortality—and they were meeting targets.

"But we hadn't really focused on our goals. We started to accommodate everyone else and lost sight of certain parts of a program," Pearson says. "I really think that by stepping back and getting refocused, we have accomplished far more with greater success."

For those who can't attend her presentation in person, Pearson has shared five key tips for reinvigorating an established CDI program that anyone can replicate.

Tip #1: Reassess Your Current CDI Program

It's easy to get stuck in the day-to-day tasks and responsibilities of any job, including CDI. To reinvigorate a CDI program, leadership should look at the existing program to see what is and isn't working well, and survey internal stakeholders as well as outside stakeholders to identify trends and review metrics. One way to do this is by conducting a SWOT analysis that looks at Strengths, Weaknesses, Opportunities, and Threats. To build renewed enthusiasm, consider a leadership retreat. Always celebrate small wins—whether meeting query goals or even having a positive interaction with a difficult physician.

Tip #2: Get or Reestablish Leadership Engagement

Getting attention and support from a health system's leadership might seem like an obvious step, but it's an important one. They will be more interested if CDI managers emphasize the importance of documentation in areas such as: value-based purchasing, accountable care organizations, patient safety indicators, and hospital-acquired conditions/infections. Managing any of these initiatives is difficult without trustworthy documentation. For sustained success, leaders will be more engaged if they are updated on progress or participate in weekly or monthly strategy sessions.

Tip #3: Focus on Physician Engagement

With physicians feeling pulled in every direction—from new quality initiatives to documenting in electronic health record (EHR) systems—they might be less than enthusiastic about CDI. However, re-energizing CDI is impossible without their interest. To do this, try to meet physicians where they are based by providing customized training at each care site; send out newsletters on improving documentation in specific problem areas; become a presence in physician lounges; and encourage interdisciplinary rounding. If all else fails, promise to provide meals or snacks during training, or host "lunch and learn" sessions.

Tip #4: Focus on Staff

Having the right, properly trained people on staff can make all the difference in a CDI program. First, get feedback on current workflows and management from existing employees to find out where improvement and more education is still needed. Some strategies enhancing training for employees include: hosting onsite bootcamps and weekly education sessions; hold monthly staff meetings; and standardize onboarding of new associates. To fill vacancies and improve turnover, consider using contractors, letting CDI staff work remotely, discuss sign on and relocation bonuses, and develop a career ladder.

Tip #5: Use Metrics and Data as Evidence of Success

Gathering and presenting data and metrics can tell a story about how well a CDI program is doing—it can drive change and reinforce accountability. One way to do this is to give CDI specialists a monthly report card. When CDI specialists see their own statistics displayed graphically they can see immediately what needs improvement. This can also help them find out if they are meeting standards that reflect their experience level.

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