The Next Frontier: Launching into Remote CDI

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Employees are requesting more flexibility and organizations are now finding that by offering remote capabilities, they are getting some of the best talent that may not reside in their same town or state. Remote capabilities have also reduced facility costs—which has also allowed organizations to offer attractive perks and benefits to promote employee satisfaction.

According to the 2018 AHIMA CDI Industry Survey, approximately 17 percent of clinical documentation improvement specialists (CDIS) work completely remotely, whereas about 42 percent have a hybrid model of remote and on-site. Of these hybrid models, approximately 37 percent of the respondents work remotely twice a week.[1] With the increased use of technology in the healthcare setting and providers documenting in the electronic health record remotely, remote clinical documentation improvement (CDI) is the next frontier for many organizations.

One Size Doesn't Fit All with Remote CDI

In recent years, CDI has expanded from the traditional setting of inpatient healthcare to other settings like outpatient and other non-acute care. With this expansion, qualified employees are harder to find and retain because there is so much competition and new opportunities for CDI professionals. This has caused many organizations to consider the possibility of implementing a remote CDI program so they can remain competitive in the industry while providing their employees with some flexibility to help promote work/life balance and increase job satisfaction.

While the concept of remote CDI seems attractive, it is important to know that there is no "one size fits all" approach. Various elements—query process, maturity of the program, level of physician engagement, equipment/internet access, and more—must be considered. A preliminary assessment of the current state is needed to determine the sustainability and amount of investment that will be required to implement a successful remote CDI program. For example, it is beneficial to evaluate all of the pros and cons, along with determining how the current CDI processes and provider engagement will be impacted if a remote program is implemented.

Pros of remote CDI include:

- It can lead to increased productivity
- Allows for flexibility and reduces the number of call outs
- Can lead to a reduction in high turnover, allowing for retention of skilled and experienced staff
- It saves cost by eliminating or reducing overhead costs
- Increases recruitment reach, not limited to a specific geographical location

Cons of remote CDI include:

- Loss of relationship with the providers and colleagues
- Privacy and security concerns
- Reduction in productivity
- Inability to properly track productivity and down time
- Hidden costs involved with creating a home office

Types of Remote Models

Before starting a remote CDI program, HIM professionals should decide which type of program to launch—full-time remote or hybrid.

Many will want to consider a full-time remote (100 percent) program. This type of CDI program has all CDI reviews done remotely. This model works best for mature CDI programs, where the physicians need little or no hand-holding to get queries answered or documentation done accurately. This gives the physicians the ability to focus on patient care and not be saddled with bumping into CDISs on the floor. It is also beneficial for programs that want to include weekend coverage. There could be quarterly on-site educational meetings for physicians, so that physicians can connect names with faces of CDISs. There also needs to be a designated physician educator/liaison, if possible, who fully engages with physicians on CDI education.

Another approach to consider is the hybrid remote/on-site program. This is a combination of on-site and remote CDISs and it can be structured in various ways. This model provides the ability to have face-to-face interactions with physicians, which some programs want to maintain, and also provides the flexibility to the CDI staff to work from home.

One common model that currently exists is where the CDI team works remotely at a minimum of two days and works onsite the other three days. In this format, not everyone is onsite or remote on the same days. Another common model is where half of the team works remotely for a period of time (example: six months) and then switch over with the other half of the team that was working on-site.

There must be a coordinated effort and plan to educate providers so that there won't be a lapse in provider education when the CDI team is not on site. Building and sustaining relationships with providers is vital to the success of a CDI program; it is important for the organization to implement a CDI program that allows the CDI team to continue to communicate effectively with the providers, including the ancillary team. Most hybrid CDI models will provide the flexibility that employees are seeking but continue to provide a consistent CDI presence as well.

Transitioning CDI teams to work completely remotely may limit the team's ability to meet directly with providers. It is vital for the CDI management team to monitor the provider's active participation and response to the CDI team when everyone is working remotely. Active participation and prompt responses are key to the success of all CDI initiatives.

Things to Consider

While the decision to implement a remote program appears relatively simple, many factors must be considered to build the program in a sustainable fashion. Remote CDI work requires managers to develop structured policies and agreements for the staff to follow. Prior to working remotely, CDI professionals should be expected to meet established productivity standards with the expectation that if metrics decrease the CDI professional may be directed to return to a site-based role. Managers have the responsibility of ensuring an individual has the proper work ethic to work remotely and can work without direct supervision. Therefore, it is important for every organization to perform their due diligence and determine whether their department will benefit from having the team work remotely.

The management team also needs to consider logistical issues that may arise from having remote capabilities. For example, strong internet connectivity will be required to ensure productivity doesn't decline. Confidentiality is a risk with remote work and remote employees must have a proper working environment and tools to protect the health record. It is crucial to work with the organization's information technology and human resources departments to ensure the success of remote CDI. Human Resources can help guide the CDI management team through the process of hiring and offer advice on current departments that have remote capabilities so that they do not have to recreate the wheel. IT can provide system requirements (i.e., VPN, virus scans, etc.) and help with other issues such as connectivity and ergonomic configurations.

While working remotely may help reduce overhead costs required to run the department, it is important to note that there may be other costs associated with a remote team, such as attending on-site meetings and education. The organization needs to evaluate who will bear these costs and address this topic in the policies and procedures. Policies and procedures also should address, but are not limited to, the following:

- Confidentiality/HIPAA Compliance

    - Confidentiality employee agreement
    - Telecommuting agreement

- Employee Telecommuting Expectations

- Productivity standards
- Schedule
- Down-time procedure
- Time off and/or call out procedure
- Directions and expectations with timesheets
- On-site requirements (if applicable, include reimbursement of expenses)
- Reasons for termination of the remote program
- Technology

  - How to access the system remotely
  - Hardware/software requirements

Creating policies and procedures that outline all requirements and expectations prior to implementing remote CDI will help the management team avoid any misunderstandings or abuse of the process.

As healthcare continues to evolve, telecommuting has become more desirable. And, in most cases, the benefits may outweigh the negatives. Remote capabilities have helped increase job satisfaction and employee performance as evidenced by increased productivity—when done right. Furthermore, remote CDI also offers the leadership team an ability to find more talent because they can now offer the desired work-life balance that everyone wants. It is vital for organizations to consider all associated pros and cons surrounding remote capabilities and to create appropriate safeguards to minimize any risks and abuse that may arise with work from home privileges. Remote CDI is truly the next frontier in CDI.

Note

1. Combs, Tammy. "The State of CDI." *Journal of AHIMA* 90, no. 4 (April 2019): 18-21.

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