CALIFORNIA ASSOCIATION of PUBLIC HOSPITALS AND HEALTH SYSTEMS

CALIFORNIA HEALTH CARE SAFETY NET INSTITUTE

# Deep Dive into Inpatient and Outpatient Clinical Documentation Improvement (CDI)

Wednesday, November 20, 2019, 11:00-12:00pm

Recording Link

# Agenda

| Time | Topic | Lead(s) |
|---|---|---|
| 3 min | Welcome & Roll-Call | Kristina Mody |
| 45 min | Deep Dive into Inpatient and Outpatient Clinical Documentation Improvement (CDI) | Tammy Combs |
| 10 min | Q&A | ALL |
| 2 min | Wrap Up | Kristina |

# Housekeeping

Join via "audio streaming;" there is no phone

Lines are muted throughout

Please use Q&A to submit questions

Webinar will be recorded and saved on

SNI Link/Data

# Intros

**Kristina Mody**

*Sr. Program Associate*, SNI

kmody@caph.org

**Tammy Combs**

*Director and Lead Nurse Planner*

HIM Practice Excellence for AHIMA

Tammy.Combs@ahima.org

# Webinar series:
# Clinical Documentation Improvement

This fall, SNI is partnering with the American Health Information Management Association (AHIMA) to present three webinars on improving clinical documentation. Click each webinar to read a description and register, or find full information here. Webinars will be available on SNI Link/Data.

**Webinar 1: Essential Elements of a Successful Clinical Documentation Improvement (CDI) Program**
Webinar Materials & Recording Link

you are here

**Webinar 2: Deep Dive into Inpatient and Outpatient CDI** Wednesday 11/20 11-12 PST

**Webinar 3: Key Takeaways for Continual CDI Success** Thursday 12/12 1-2pm PST; Registration Link

# Take-A-Ways from Webinar 1

- The essential elements of a successful CDI program include:
  - Clearly established organization structure
  - Detailed policies and procedures
  - Defined record review process
  - Compliant query process
  - Physician engagement

- Key performance indicators used to measure CDI success include:
  - Organization
    - Case Mix Index
    - Risk Adjustment Factor (RAF)
    - Denial rate
    - Patient Safety Indicators (PSIs)
    - Hospital Acquired Conditions (HACs)
  - CDI Program
    - Review Rate
    - Query Rate
    - Response Rate
    - Agreement Rate
    - Quality Audits
    - Productivity Goals

- The effective components of a CDI program include:
  - Effective Communication
  - Leadership Skills
  - Technology
  - Ongoing Training
  - Ongoing Audits

# Deep Dive into Inpatient and Outpatient CDI

Tammy Combs RN, MSN, CDIP, CCS, CCDS

AHIMA

ahima.org

AHIMA
American Health Information Management Association®

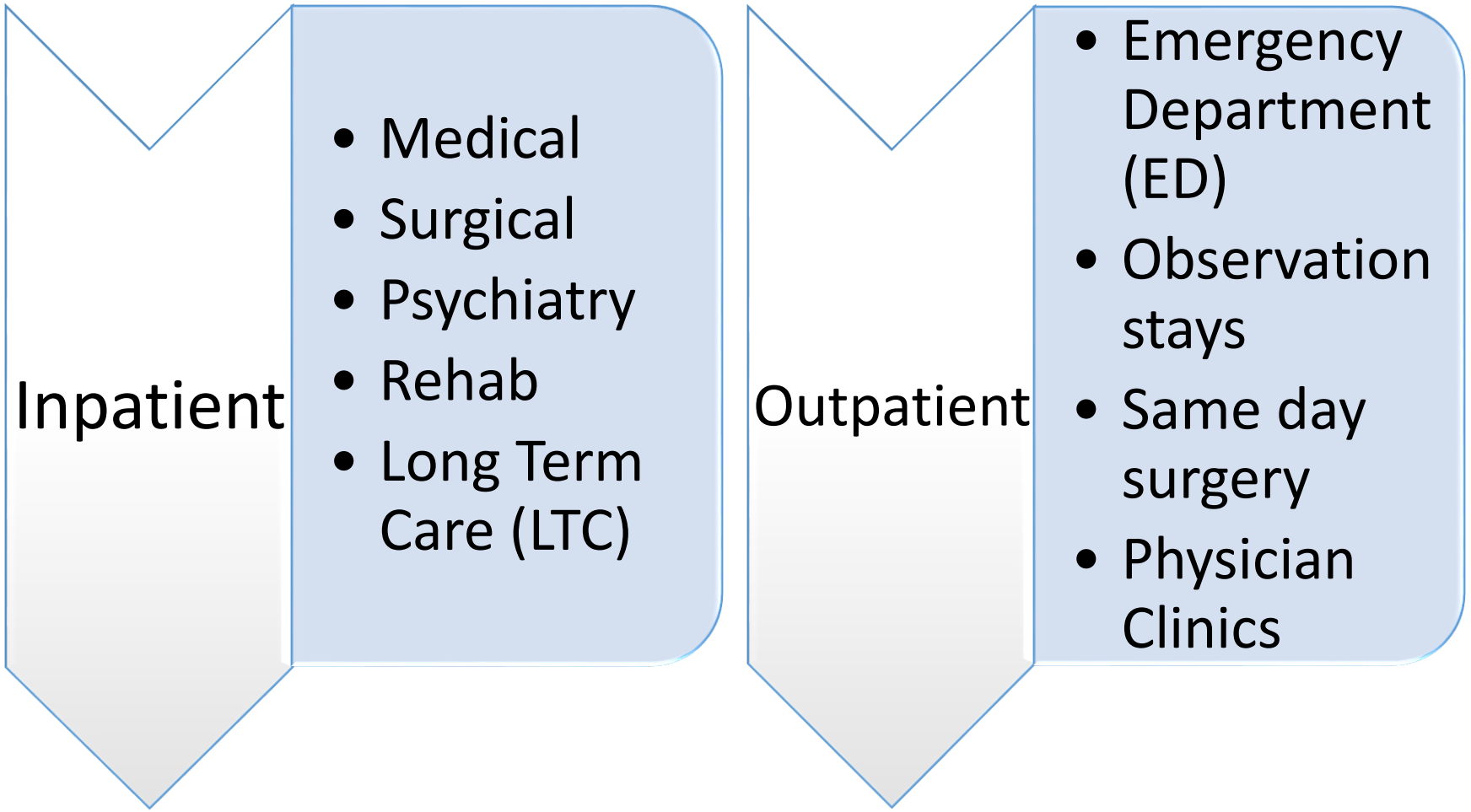
# Objectives

- Analyze the high-quality components of inpatient documentation and outpatient documentation
- Analyze the documentation components needed to support care across the healthcare continuum
- Recap steps health systems can take to improve inpatient and outpatient clinical documentation integrity (CDI)

# Coding and Clinical Documentation Integrity (CDI) Comparisons

| CDI | Coding |
| --- | --- |
| Documentation Focused | Coding Focused |
| Concurrent review (when possible) | Retrospective review |
| Assign working codes | Assign file codes |
| Communicates with physician on regular bases and provides education | Communicates with physician as needed |

# Healthcare Setting



# Polling Question

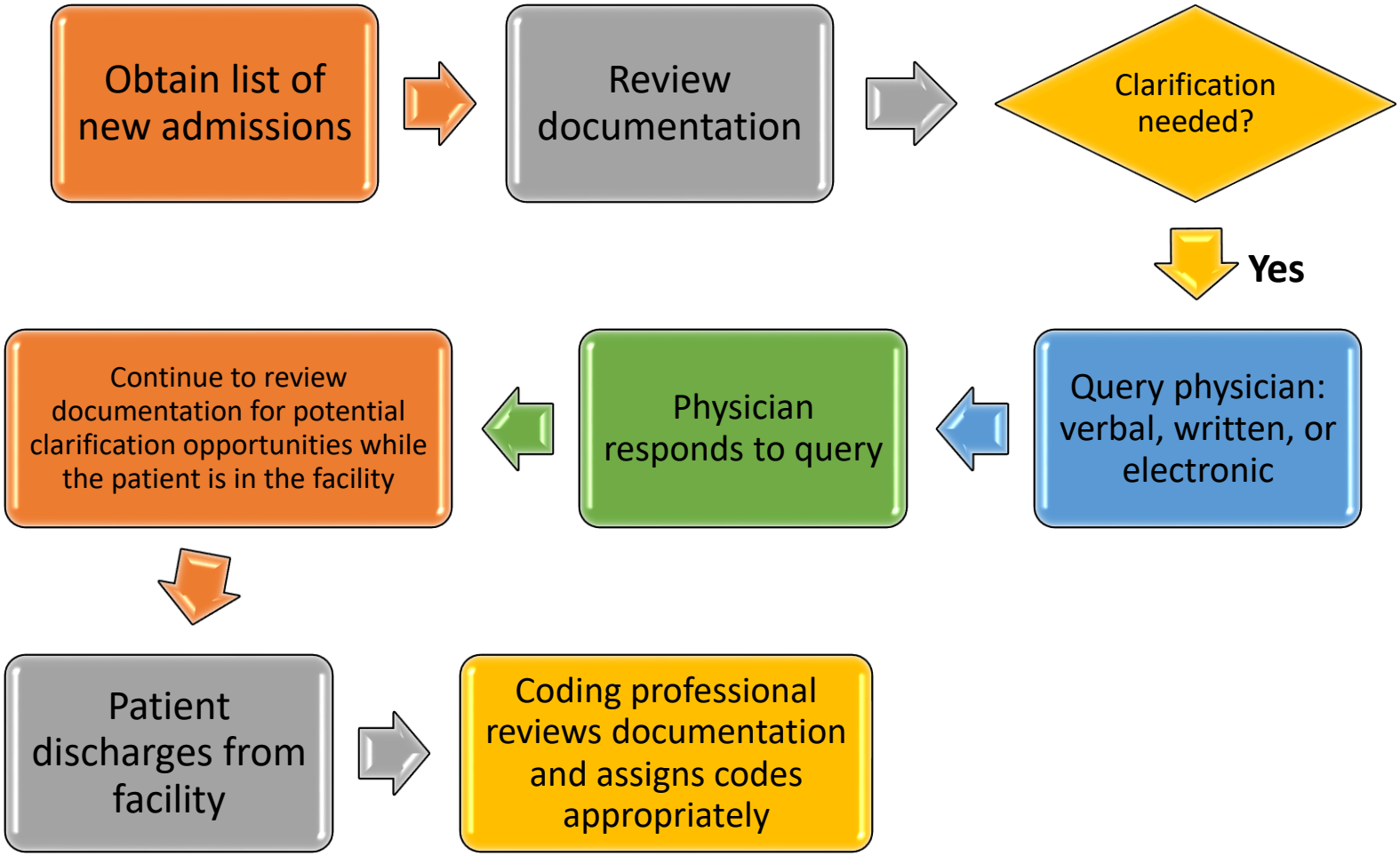
- What healthcare setting do you currently work in?
  - Inpatient
  - Outpatient
  - Both

*Select one*

# The CDI Record Review Process

- Provider Notes
- Nursing Notes
- Nutrition
- Wound Care
- Respiratory Therapy
- Physical/Occupational Therapy
- Discharge Summary

# Day in the Life of an Inpatient CDI Professional



# Seven Characteristics of High Quality Clinical Documentation

## Complete

- Maximum content
- Thorough
- All concerns addressed
- Example:

  Patient presents to ED with a severe muscle cramps and tachycardia. Lab findings reveal a potassium level of 2.4 and potassium replacement is started.

  Diagnosis: ⇓K

# Consistent

- No contradictions
- Example: Patient admitted to observation with syncope and altered mental status. The attending physician documents TIA, orders a neuro consult. Neuro note indicates diagnosis as CVA. Attending note the following day, stable to discharge home.

# Timely

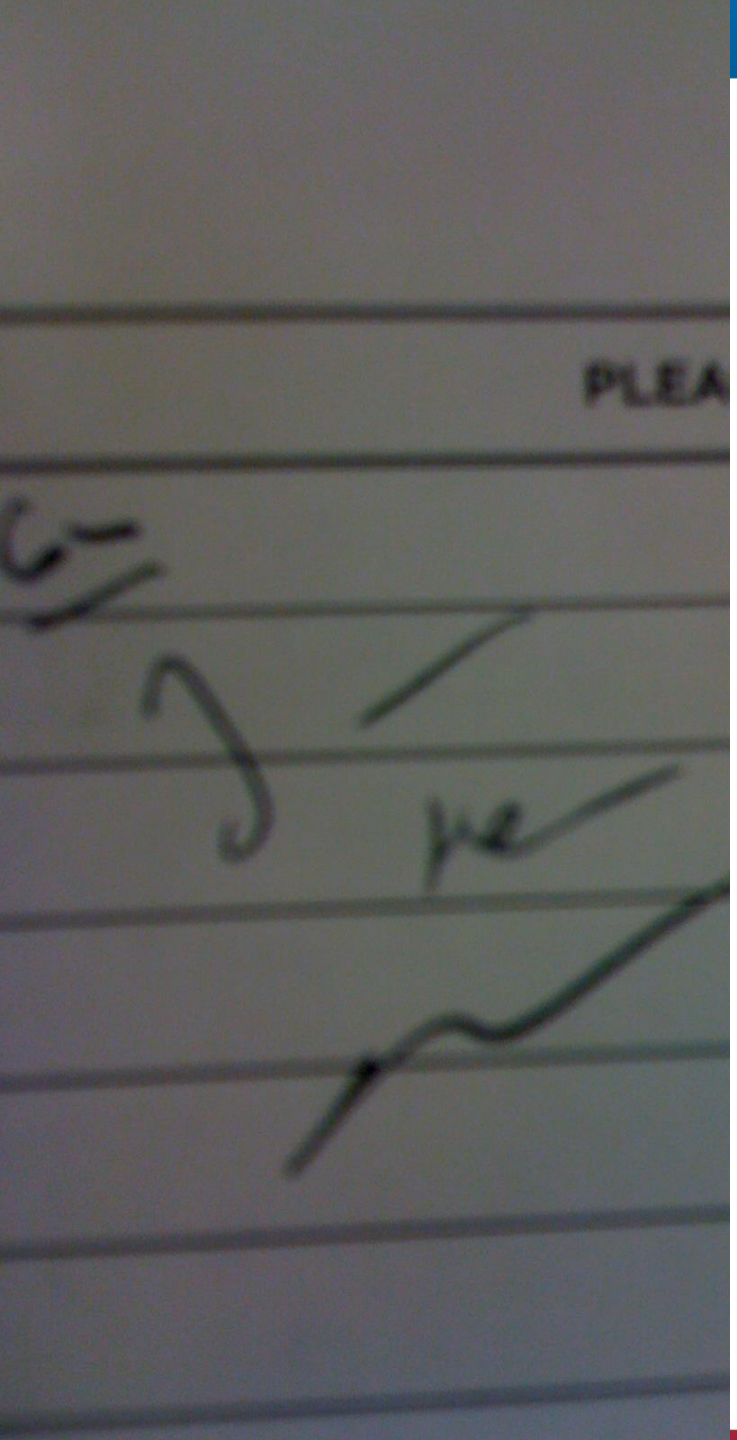
- Information is available at or near point of care
- Example: Patient admitted with pneumonia from a skilled nursing facility and is bedridden. On day 3 the provider documents stage 4 pressure ulcer on coccyx.

# Clear

- No ambiguity
- Example: Patient with a Respiratory Rate (RR) 32, PCO2 60, PO2 55, unable to complete a full sentence and was placed on mechanical ventilation.
- Diagnosis: Shortness of breath

# Precise

- Accurate
- Exact
- Strictly defined
- Example: Patient admitted with a CVA with left sided weakness. Nursing documents patient coughing when drinking liquids. Dietary consult recommends thickened liquids and swallowing evaluation. Swallowing evaluation reveals aspiration when drinking thin liquids On day 3 patient spikes a fever, physician documents pneumonia.



# Legible

- Easy to decipher and comprehend
- Example: H&P notes patient has possible sepsis and this is copied forward throughout the health record until discharge. However, the patient does not have any clinical evidence of sepsis.

# Reliable

- Trustworthy
- Safe
- Diagnosis and treatment are not consistent.
- Example: Patient admitted with shortness of breath. O2 saturation levels on 1liter of O2 via nasal canula 95-97%. Diagnosis: Acute respiratory failure.

# Polling Question

- Have you heard of the seven characteristics of high-quality documentation before today?
  - Yes
  - No

*Select one*

# CDI Tools

**Code book**

- Hard copy
- Electronic

**Coding Clinic™**

**CPT® Assistant**

**Policies and procedures**

- Record Review
- Compliant Query Process
- Escalation process
- Communication Process



AHIMA

# Electronic Health Record Access

- Daily census
- Notes to be reviewed
  - Provider Notes
  - Nursing Notes
  - Nutrition
  - Wound Care
  - Respiratory Therapy
  - Physical/Occupational Therapy
  - Discharge Summary
- Encoder
- Communication tools

# Inpatient versus Outpatient Comparisons

| Inpatient | Outpatient |
|---|---|
| Admissions typically 2 days or greater | Admissions typically less than 2 days or shorter<br>Single encounter visits |
| CDI professionals with coding or clinical knowledge base | CDI professional with coding or clinical knowledge base |
| Return on Investment:<br>• Case mix index (CMI)<br>  • MCC & CC capture<br>• Quality measures<br>• Denial rates | Return on Investment:<br>• Risk Adjustment Factor<br>  • HCC capture<br>• Quality measures<br>• Denial rates |

# Provider Education

ONE-ON-ONE CONVERSATIONS

QUERIES

STAFF MEETINGS

ROUNDING

FLYERS

BLOGS

NEWSLETTERS

# Care Teams and Coding

FOCUS ON HIGH-QUALITY DOCUMENTATION

RESPOND TO QUERIES

UTILIZED THE EXPERTISE OF CDI AND CODING PROFESSIONALS

ASSESS DENIED CLAIMS

ATTEND CDI EDUCATION SESSIONS

# Recap steps health systems can take to improve inpatient and outpatient CDI

- Create a steering committee
- The timing of the record review should be defined in the policies and procedures
- The notes to be reviewed should be included in the policy and procedure
- The seven characteristics of high-quality clinical documentation should be defined in the policy and procedure
- The elements of documentation that support care across the healthcare continuum should be included in the policy and procedures
- CDI team will need access to a code book
- A compliant query process should be defined in the policies and procedures

# Polling Question

- Do you have any of the following elements in your current policies and procedures?
  - Steering committee
  - Record review policy and procedure
  - The notes to be reviewed are included in the policy and procedure
  - The seven characteristics of high-quality clinical documentation are defined in the policy and procedure
  - The elements of documentation that support care across the healthcare continuum are included in the policy and procedures
  - CDI team has access to a code book
  - A compliant query process is defined in the policies and procedures

*Select all that apply*

# Take-A-Ways

Analyze the high-quality components of inpatient documentation and outpatient documentation

- Documentation that is:
  - Complete
  - Consistent
  - Timely
  - Clear
  - Precise
  - Legible
  - Reliable

Analyze the documentation components needed to support care across the healthcare continuum

- CDI Tools
- EHR Access
- Provider Education
- Setting specific expectations
- Care Team Support

Recap steps health systems can take to improve inpatient and outpatient clinical documentation integrity (CDI)

- Create a steering committee
- The timing of the record review should be defined in the policies and procedures.
- The notes to be reviewed should be included in the policy and procedure.
- The seven characteristics of high-quality clinical documentation should be defined in the policy and procedure
- The elements of documentation that support care across the healthcare continuum should be included in the policy and procedures
- CDI team will need access to a code book
- A compliant query process should be defined in the policies and procedures

# References


- AHIMA Body of Knowledge (2019). **Clinical Validation: The Next Level of CDI (January 2019 Update)** http://bok.ahima.org/doc?oid=302679#.XO7sJvZFyUk
- AHIMA Body of Knowledge (2019). Guidelines for Achieving a Compliant Query Practice (2019 Update) http://bok.ahima.org/doc?oid=302674#.XO7r9PZFyUk
- Hess, P.C. (2015). Clinical Documentation Improvement Principles and Practice. Chicago, IL: American Health Information Management Association.
- Hess, Pamela. *Clinical Documentation Improvement for Outpatient Care.* AHIMA Press: 2018

# Questions

# WRAP UP

# Webinar series:
# Clinical Documentation Improvement

This fall, SNI is partnering with the American Health Information Management Association (AHIMA) to present three webinars on improving clinical documentation. Click each webinar to read a description and register, or find full information here. Webinars will be available on SNI Link/Data.

**Webinar 3: Key Takeaways for Continual CDI Success** Thursday 12/12 1-2pm PST; Registration Link

# In Case You Missed It….


## PRIME Disparity Reduction Webinar

Hear about PRIME DY14 progress in disparity reduction

Learn from ZSFGH on their equity strategy deployment and learnings

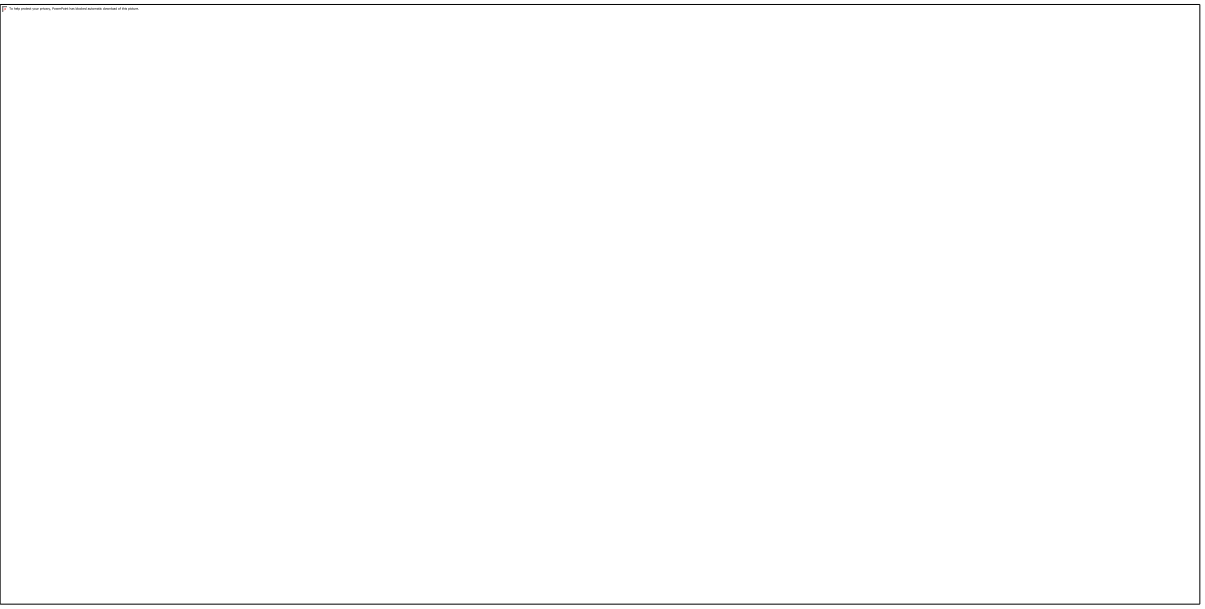
## Chlamydia Screening: Best Practices and Implementation Strategies for Primary Care Settings

Understand evidence-based implementation strategies for increasing chlamydia screening

Access a wealth of resources to support primary care settings in increasing screenings

# PRIME External Webinar

- CAPH/SNI to share PRIME performance data and implementation trends for year four of the program.
- Los Angeles County Department of Health Services and University of California, San Diego, will share their experiences



**Share with your partners and stakeholders!**

Register now

An archived version of the webinar will be available here

# See you soon!


Registration open now!

**Nadine Burke Harris,** MD
Surgeon General of California

**Adam Schickedanz**
Pediatrician & researcher, UCLA

**Michelle Rhone-Collins**
Founding LIFT-Los Angeles Executive Director

**Len Nichols**
Policy professor, George Mason University

**Ai-Jen Poo**
ED, National Domestic Workers Alliance

**Celinda Lake**
Pollster & political strategist

**Stacey Chang**
Founder & ED, Design Institute of Health

**Robin Wittenstein**
CEO, Denver Health

**William York**
Executive VP, 211 San Diego

# Upcoming Dates

**Dec 3 (12-1):** PRIME/QIP OH

**Dec 4-6:** CAPH/SNI Annual Conference

**Dec 12 (1-2):** Key Takeaways for Continual CDI Success [here]

**Dec 16 (1-2)** PRIME External Webinar [here]

**Jan 14(1-2)** Anchoring PRIME Behavioral Health Integration in Practice [here]

| M | T | W | Th | F |
|---|---|---|---|---|
| December | | | | |
| 2 | 3 | 4 | 5 | 6 |
| 9 | 10 | 11 | 12 | 13 |
| 16 | 17 | 18 | 19 | 20 |
| 23 | 24 | 25 | 26 | 27 |
| January | | | | |
| 30 | 31 | 1 | 2 | 3 |
| 6 | 7 | 8 | 9 | 10 |
| 13 | 14 | 15 | 16 | 17 |

# Share Your Feedback

How did we do?

What did you learn?

Do you have suggestions for future topics or content?

**PLEASE COMPLETE OUR POP-UP SURVEY**