



How to create and maintain a thriving ACDIS local chapter in the first year

CDI professionals need to reach out to others in the field. Local, regional, statewide, or topic based ACDIS chapter meetings offer an avenue to share experience and learn best practices. The importance of active participation within a chapter should not go unrecognized. To create and have a thriving ACDIS local chapter requires active participation from the leadership and members. Here, we hope to provide some tips on how to help you start a local, regional, or statewide ACDIS chapter.

Take advantage of ACDIS national

ACDIS national is your biggest supporter; they are here to help their local chapters in any way necessary. All you have to do is ask! National wants each local chapter to reach their maximum potential and can help to facilitate networking opportunities for its members and expand educational opportunities for CDI professionals throughout the country. After all:

ACDIS is a community in which CDI professionals share strategies for successful CDI programs and achieve professional growth. Its mission is to bring CDI specialists together.

There are many resources available at your disposal and the ACDIS team is interested in knowing your interests.

If you are looking to start a local chapter, you have come to the right place!

Email the ACDIS team at info@acdis.org. A member of the ACDIS team (typically ACDIS Associate Editorial Director Linnea Archibald or Director of Programming Rebecca Hendren) will be happy to set up a convenient time to meet via Microsoft Teams call and review the expectations, requirements, and offer any assistance that you may require.

ACDIS can also help generate participation in your networking efforts by emailing national members from your state/region letting them know about your interests. ACDIS will also email its membership on an annual basis regarding networking efforts in their areas. If you have planned events let the ACDIS team know via [the Official Local Chapter Request form](#), and they can be posted on your local chapter page on the main ACDIS webpage.

Get social

Take advantage of social media! It is a quick and effective way to communicate information. ACDIS national maintains a number of networking and communication tools including the [ACDIS Forum](#), as well as groups on [Facebook](#) and [LinkedIn](#). Each of these venues allows users to post comments, concerns, and interests. We encourage chapter leaders to avail themselves of these forums.

Additionally, chapter leaders are asked to provide any information regarding upcoming meetings on a monthly basis using the [Official Local Chapter Request form](#). This information is posted in ACDIS' weekly eNewsletter [CDI Strategies](#). Don't forget to take pictures during your local chapter meetings to then post on social media!

Make the call

While this may sound scary, it is a great and effective way to meet new colleagues within the profession! For



example, the Massachusetts ACDIS local chapter took note of which local hospitals were not already part of the membership group and then called those hospitals to find out if they had a CDI department. Remember, if at first you don't succeed, try again. Often when asking the operator about a CDI program, the Massachusetts leaders received no response or were told such staff did not exist. A follow-up call, directed to the HIM office, landed the volunteer leaders in the right department. Also try asking for case management departments. Due to these calls, three additional hospitals' CDI staff joined the chapter.

Volunteer leaders often know their neighborhoods best. Additionally, CDI professionals working alone in a facility may not be aware of ACDIS national or local chapter networking. A personal invitation and kind voice goes a long way to creating a new networking friend.

After connecting with new potential members, collect their contact information, and email them the link to [the Online ACDIS Local Chapter Roster](#). This roster is easy to complete and will provide ACDIS valuable information including their contact information and interest at the local, regional, state, or topic based level.

Set a first meeting

This meeting will help determine who, and how many, are interested in establishing an ACDIS chapter. Send the invitation to the CDI contacts you have been able to collect from the calls that were made. Following is a sample invitation letter:

Date

Recipient's name

Recipient's address

Dear name,

You are invited to a meeting in follow-up to our phone conversation about starting a (local, networking group, etc.) chapter of ACDIS. This first meeting will be an informal (gathering, call, WebEx, etc.) to discuss our mutual interest in starting an ACDIS chapter. We will have introductions, discuss leadership needs, interests, and responsibilities, and begin to organize and agree upon details relating to chapter membership and future meetings.

- ⑤ *Date*
- ⑤ *Time*
- ⑤ *Location/Virtual platform link*
- ⑤ *Host if applicable*
- ⑤ *RSVP*

Sincerely,

John Smith

Drafting an agenda

Creating (and printing, if the meeting will be in-person) an agenda for participants to follow could help keep the meeting efficient and on track. Let the host collect attendance records, start the meeting, and record the



discussions/votes at the meeting if applicable. This information can be stored in the chapter business records.

Here is a sample agenda for an initial organizational meeting:

- ⑤ *1-1:30 p.m.: Sign in/meet and greet*
- ⑤ *1:30-1:45 p.m.: Initiate meeting. Host to call attendees together, make announcements, and take notes of the proceedings.*
- ⑤ *1:45-2:15 p.m.: Introductions of all attendees. Each attendee allowed three minutes to voice their opinions regarding the selection of the chapter being local, regional, statewide, or topic based.*
- ⑤ *2:15-2:30 p.m.: Break*
- ⑤ *2:30-3:30 p.m.: Chapter business. Meeting host to collect votes and report results to the attendees.*
 - *Local, regional, statewide, or topic-based group.*
 - *Future meetings discussion. Best day of the week, time of the month, time of the day, and platform for events (i.e., virtual versus in-person).*
 - *Selection of leadership for the chapter and their specific roles such as record keeper, co-leaders, president, vice president, secretary, etc.*

The leadership team should use information collected at the first meeting to determine host, location, date, and timeline of the subsequent chapter meetings. Use emails, and/or conference calls to communicate all discussions and decisions related to the first meeting. Keep a record of all communications from the leadership team and store that information in the chapter business records.

Host selection for in-person events

The host should inform the leadership team of the room occupancy limitations and if they can provide lunch and provide written email confirmation of the location, date, and timeline for the meeting. The timeline will help determine how many presenters are needed for the meeting. If lunch will not be provided, ask attendees to supply their own drinks and meal for the meeting.

Following is a sample host request letter:

DATE

Good afternoon,

Thank you for being an active and supportive member of the STATE ACDIS chapter. Your support and dedication to our group and profession is what is helping to keep our local chapter thriving!

We are reaching out to you in hopes that your facility would potentially consider hosting an in-person chapter meeting this year. The co-chairs are here to help you and your team organize, plan, and create an agenda as well as obtain continuing education credits. We are here to assist in any way possible. We appreciate your involvement and support of our ACDIS chapter and look forward to working with you on an upcoming meeting!

Please let us know your thoughts. We are happy to answer any questions.

Thank you for your consideration.

Best,

Chapter co-chairs



Speaker identification

Leverage information gathered at the initial event to identify topics of interest for subsequent meetings. Use the [Online ACDIS Local Chapter Roster](#) to identify members interested in presenting. Leaders can use the [Official Local Chapter Request Form](#) to request a copy of their roster at any time from ACDIS national. Reach out to these individuals and request the title of the topic they wish to present. The presenters need to provide the length of time required for their presentation as well.

For in-person meetings, ACDIS national recommends hosts identify topics from within their own programs and staff. A helpful physician might present on malnutrition or a nephrologist who effectively documents renal disorders might present on clinical indicators for kidney injury. The team might come together to research effective query practices and share its query auditing process or discuss their physician engagement efforts.

ACDIS national believes such presentations to be in the spirit of its mission to encourage the development of a “healthcare community for clinical documentation specialists, providing a medium for education, professional growth, program recognition, and networking.”

For virtual meetings, speakers should be chosen from a variety of organizations represented in the chapter membership to ensure no one organization has a monopoly on information shared. For more information on virtual meeting planning, see the section below labeled “Hosting an effective virtual meeting.”

For in-person meetings, the leadership team can select presentations by using the timeline provided by the host. Use emails, and /or conference calls to communicate all discussions and decisions made by the team leaders amongst the leadership team, the event hosts, and ACDIS national.

Once all presentation/presenter selection has been done, the leadership team should decide the timeline of the meeting and confirm the timeline with the presenters unless the meeting host agreed to be responsible for this task.

Each presenter needs to provide their full name, title, organization, address, presentation title, and length of the presentation to the leadership team prior to speaker selection. This information will be used on the application for ACDIS continuing education credits for the chapter meeting.

Following is a sample agenda from the Tennessee ACDIS chapter:

Tennessee ACDIS Chapter

DATE

ORGANIZATION AND LOCATION

Meeting room: XX

Lunch provided (if sponsored, name vendor/sponsor)

This event has been approved for 4 ACDIS CCDS/CCDS-O CEUs

Agenda:

- ⑤ 8:30-8:45 a.m.: *Introduction and announcements*
- ⑤ 8:45-9:45 a.m.: *“Coding Clinic for ICD-10-CM/PCS,” Kyra Brown*
- ⑤ 9:45-10 a.m.: *Break*
- ⑤ 10-11 a.m.: *“Unexpected Problems in CDI: Managing the C-Suite,” Trey La Charite, MD*



- ⑤ 11 a.m. to noon: “Pediatric CDI,” Larry Faust, MD
- ⑤ Noon to 12:30 p.m.: Lunch
- ⑤ 12:30-1:30 p.m.: “Common CDI Opportunities and Solutions,” Jennifer Scofield

Hosting an effective virtual meeting

Typically, ACDIS national recommends chapters host events on a quarterly basis. Ideally, at least two meetings should be in-person and the other two can be virtual, however, ACDIS national recognizes that for many chapters (particularly those covering larger geographic regions or those that are topic- rather than location-based), virtual meetings offer the best platform for regular engagement and networking. ACDIS national does not recommend attempting to include a remote option for an in-person event. Doing so doubles the work for the volunteer leadership team and disincentivizes attendees from making the commitment to attend in person.

Because people may have limited attention spans for virtual meetings, consider trimming the agenda to an hour to an hour and a half. Often, virtual meeting attendees try to multi-task during virtual meetings and may not be getting the full benefit from the education. Including a video component, an actual person for the attendees to watch and pay attention to, can help with this.

If the chapter has limited funds and can only use a free platform version with limited attendance, consider holding a few focused roundtable discussions. For example, a chapter may wish to pull together a group of 15-20 participants to talk about tracking staff productivity. For this type of meeting, chapter volunteers would need to curate a list of discussion topics and keep the conversation rolling.

In times past, ACDIS would dissuade local chapters from attempting to conduct full-day virtual events. Times change. The tools have changed, too. There are a wide variety of ways to leverage the tools included with some of these online platforms. Be sure to connect with your leadership team and play around with the platform’s capabilities multiple times before you go live. Connect with the national organization, too, for assistance. National is in touch with many of the chapter leadership teams around the country and can help provide fresh ideas and insight as you proceed with your plans.

When choosing a date and time for your virtual meeting, be mindful of time zones and ensure meetings are during typical business hours for all attendees. When possible and appropriate, consider contacting ACDIS national and opening your meeting to other local chapters across the country.

If possible, have at least two members of the leadership team as organizers or panelists during the call. One can introduce the speaker and provide opening remarks, and the other can monitor the chat and question sections of the platform or help handle technical problems.

At the outset of the program be sure to:

- ⑤ Welcome everyone.
- ⑤ Introduce yourself and other chapter leaders on the line.
- ⑤ Remind attendees to mute their lines when not speaking and to avoid using the hold button. Hold music will disrupt the call for everyone.
- ⑤ Remind attendees of the CEU availability and how they can expect to receive them.
- ⑤ Review the agenda.
- ⑤ Introduce the speaker and hand the program over to them.



Ask your participants to mute when they're not talking. If someone forgets, or is disrupting your meeting, you can mute noisy attendee lines from the participant panel.

While it may be uncomfortable for some, consider having the meeting on-camera. The most powerful way to encourage video sharing is to turn on your own camera. Seeing facial reactions builds trust and community particularly when local chapter members may be missing in-person connections. If the video/audio connection lags, stop sharing video and continue with the presentation. Internet connectivity in people's homes can fluctuate markedly from day to day and depending on the time of the day. So, stay calm and be prepared with a backup plan.

Technology is an extraordinary tool, but there will always be challenges. Leaders should have a copy of the slide presentation so that if the speaker cannot take control and move the slides themselves, the leaders can do it. Upload a copy of the slide deck to either your page on the ACDIS website (using the [Official Local Chapter Request Form](#)) or the online meeting platform. That way if the video/screen sharing capabilities falter, the attendees can follow along on their own computers.

For more advice on hosting and running virtual meetings, check out our Local Chapter Virtual Meeting Guide, available on the ACDIS website on the local chapter page (under the "Networking" tab on the website).

Continuing education units (CEUs)

The link to the application for the ACDIS CEUs for the Certified Clinical Documentation Specialist (CCDS) and CCDS-Outpatient (CCDS-O) credentials is available on the ACDIS website. **The application must be completed 30 days prior to the scheduled chapter meeting.**

Once the application is completed, ACDIS national staff will review the details within one to two weeks. After ACDIS reviews approves the application, ACDIS national provides email confirmation of the CEUs and the official ACDIS Continuing Education Certification for the meeting. If applicable, ACDIS national will provide an explanation of why the application was declined or needs to be revised.

The chapter leadership team should delegate someone to handle this process. All CEU applications must come from a member of the leadership team. Please do not delegate this responsibility the event host or event speakers. This requirement is meant to ensure the integrity of the application process and to eliminate confusion, duplication, and errors within the process.

Please also assign a member of the leadership team to deliver the CEU certificates to the meeting attendees. For in-person meetings, this may be done by printing the certificates and handing them to attendees at the close of the event. For virtual meetings, this may be done by emailing confirmed attendees (based on attendance records from the virtual event platform) their certificates. Leaders should discuss a process for this and add a description of this process to its formal policies and procedures.

ACDIS national cannot assist in the application process for other association CEUs. Chapter leaders seeking to obtain CEUs from the American Nursing Association, American Health Information Management Association, American Academy of Professional Coders, or other organization should reach out to those groups for further information. Some may allow the ACDIS CEUs to crossover, some may charge a fee for CEU applications and processing.

Online ACDIS Local Chapter Roster



According to the [Official Local Chapter Agreement Form](#), chapter leadership needs to ask members to complete the [Online ACDIS Local Chapter Roster](#) on a regular basis. This is the official roster which allows leaders to collect important information including whether the local chapter member is:

- ⑤ an ACDIS member
- ⑤ interested in speaking at a local event (and the topic)
- ⑤ available to host an event at their facility
- ⑤ interested in volunteering to help leadership

Upon completion of the online membership roster, registrants receive a discount code off national membership and information on how to redeem that discount.

At any time, leaders may request a copy of their chapter's roster from ACDIS national using the [Official Local Chapter Request Form](#). An ACDIS national team member will pull the roster and share it with the requesting leader within one to two weeks. If for any reason you need a copy of the roster urgently, please email the ACDIS team at info@acdis.org after submitting your request form.

Chapter business meeting(s)

Be sure to allow for 30 minutes or more if needed after the last presenter to have a chapter business meeting. During this meeting the leadership team can:

- ⑤ Collect information regarding future volunteer hosts and presenters
- ⑤ Identify attendees needs and educational interests
- ⑤ Discuss any recent policy or procedure changes
- ⑤ Review leadership activities for transparency
- ⑤ Present related news and developments from national
- ⑤ Review any related financial activities or use

At in-person meetings, a chapter meeting evaluation form can be passed out at the beginning of the meeting, and collected at the meeting's conclusion. The leadership team can agree upon the information on the chapter meeting evaluation form and have it prepared prior to the meeting date. If your chapter is meeting virtually, email the form to the attendees following the meeting as either an attachment (which they then can return via email) or as an online survey using a free platform such as Google Forms or SurveyMonkey.

Future events and business

The leadership team can review the chapter meeting evaluations to see what attendees liked and disliked about the first meeting. The chapter meeting evaluation form is an important tool that can be used during and after the first year. The leadership team can decide what questions to ask and use the responses to improve and move the chapter forward.

The leadership team needs to be flexible in the first year of the chapter. Roles and responsibilities of the leadership team may change several times as each individual adapts to the changing needs of the group. Don't worry, however, ACDIS national representatives are always available to assist local chapters. The best way to reach them is by emailing info@acdis.org.

We recommend looking for volunteers within the chapter to assist with hosting meetings in the first year. We also suggest that chapters hold off on creating bylaws until after the first year. This activity requires a lot of time and effort



on the part of the leadership team and such tasks can be too overwhelming for the leadership team in the first year, and may deplete the energy of your chapter at a time when growth is needed.

The goal of the first year for the chapter is making and keeping lasting contacts in the CDI profession at the local, regional, state, or topic-based level. Chapter meetings are a great way to have that personal contact with others in the CDI profession. Networking with others in the profession helps to promote best practice methods.

Chapter leaders should also, to the best of their ability, establish a rapport with other CDI or healthcare-related local state chapters and organizations to increase their fledgling chapter's reach. Having a dedicate liaison officer who communicates or collaborates with these outside groups will help build a solid relationship.

The leadership team should focus on getting multiple meetings (three or four) organized in the first year with qualified presenters and topics of interest to the CDI professional. Meetings that offer ACDIS CEUs will help to draw interest. Keeping the meetings free to the attendee will help to draw interest as well.

As chapter interest grows, and attendance at chapter meetings increases, the leadership team can evaluate and decide on the next steps to keep the chapter moving forward in the second year.

Try to enjoy the time spent with the chapter members in the first year and learn as much as you can from them. The strength and growth of the chapter depends on the relationships/bonds made in the first year.

Whether the chapter remains informal or becomes more formalized in the second year can be determined at a later time by the leadership team and chapter members. Do what you can to be a part of the new, growing chapter. The benefits are endless to you as a CDI professional.