



Meetings in a can

A planned speaker may have travel trouble at the last minute, or a downloaded webinar ends up with a few technical glitches, or leaders/hosts may find themselves simply one educational session short. The following items are resources available to ACDIS national members on [its website](#) and can be used to help facilitate your meeting.

CDI code of ethics

The ACDIS Advisory Board approved the founding CDI Code of Ethics.

- Ask meeting participants to bring copies of their CDI program's code of ethics.
- [Review the ACDIS Code of Ethics](#). Compare against the [AHIMA Code of Ethics](#).
- Discuss main points of the codes. Discuss the importance of creating facility-specific ethics codes/policies.
- Arrange small groups to create possible draft codes participants can bring back to their programs for further discussion.

CDI 101

An initial ACDIS chapter start-up meeting typically involves sharing how participants' CDI programs are structured and appreciating the "purpose" of CDI efforts.

- ACDIS publishes the *CDI Journal* on a bimonthly basis. Each issue focuses on a different area of CDI—from education to physician engagement, to denials management. To view all the issues of the *Journal*, [click here](#).
- This ACDIS white paper discusses the importance of building a foundation for your CDI program: [Cornerstone of CDI Success: Build a Strong Foundation](#).
- ACDIS publishes an annual CDI Week Fact Sheet document that covers the basics of CDI's role within the healthcare organization. [Download the latest version here](#).

CCDS preparation

The Certified Clinical Documentation Specialist (CCDS) credential was created in 2008 as a service of ACDIS to answer the demand among members for a nationally recognized mark of distinction. Over the following year, a multi-disciplinary committee convened and worked with a third-party vendor to craft the exam.

- Consider holding a discussion regarding the CCDS and other related CDI credentials.
- Hold a group study session for any chapter members interested in sitting for the exam.
- Ask participants to share their experiences studying for and taking the exam.
- Review the [free Exam Candidate's Handbook](#).
- Request a copy of [The CCDS Exam Study Guide](#) to review and/or use as a raffle item through the [Online Leadership Request Form](#).
- Invite an ACDIS national team member to be a guest speaker to review the application, testing, and recertification process by emailing info@acdis.org.

ACDIS 101

Local chapter members do not need to be ACDIS national members. Local chapter members do, however, receive a discount on ACDIS national membership. Annually, local chapter leaders should take some time to review the benefits of ACDIS membership and provide a tour of sorts of the website.

- Review the Membership pages on the ACDIS website together and discuss any questions you might have: <https://acdis.org/membership/membership-benefits>



- ❑ Download the 60-minute webinar tour of the ACDIS site at <https://acdis.org/resources/website-tips-acdis-lunch-n-learn-website-tour>
- ❑ Arrange a virtual visit with a member of the ACDIS national team by emailing info@acdis.org.

Getting buy-in from providers

The following PowerPoint presentations and *CDI Journal* articles can be used to foster conversation regarding obtaining provider support. Choose several volunteers to review the materials and to present what they learned to the group during the meeting. Ask meeting participants to bring one item or anecdote from their facilities about how they convinced provider(s) of the value of CDI.

- ❑ The 2022 CDI Week Industry Survey includes a full section on the current state of provider education and engagement. [Download the report here.](#)
- ❑ “Physician advisor’s corner: Focus on the why of CDI” by Benjamin Kartchner, MD, CHCQM, CMPC, published in the January/February 2023 edition of the *CDI Journal*
- ❑ This 2020 position paper, *Provider Engagement and the “Why,”* seeks to discuss and define provider engagement and its value in CDI. [Download the paper here.](#)
 - The above paper was the beginning of a multipart series that also included the following papers:
 - [Clinical Integration of CDI](#)
 - [Hybrid Engagement Model: Orlando Health, NYU Langone Offer Flexible Approaches](#)
 - [Defining and Measuring an Engaged Provider Base](#)
 - [Sustaining Provider Engagement Remotely at Cooper University Health Care](#)
- ❑ “Engaging Physicians Proactively With AI-Powered CDI,” presented by Dana Burnap, RN, CDI specialist, and Tami L. McMasters-Gomez, MHL, CCDS, CDIP, director of coding and CDI services, at UC Davis Health based in Sacramento, California, at the ACDIS conference, May 2022. [Download this document here.](#)
- ❑ “The Heavyweight: Using a Physician Advisor/Champion to Knock Out Your CDI/Coding Struggles,” presented by Juliet B. Ugarte Hopkins, MD, CHCQM-PHYADV, physician advisor for case management, utilization, and clinical documentation at ProHealth Care, Inc. in Waukesha, Wisconsin, at the ACDIS conference, May 2022. [Download this document here.](#)
- ❑ “Solid Documentation for Medical Decision Making in E/M: Ensure Your Providers Get a GOLD Medal and Not a ‘Participation’ Trophy,” presented by Shannon McCall, RHIA, CCS, CCS-P, CPC, CPC-I, CEMC, CRC, CCDS, CCDS-O, director of HIM and coding at HCPPro in Middleton, Massachusetts, at the ACDIS conference, May 2022. [Download this document here.](#)
- ❑ “CDI Physician Engagement: The Alchemy of Transforming Documentation Lead to Gold,” presented by Nicole Draper, RN, BN, MHA, CDI specialist at Clinical Documentation Improvement Australia in NSW, Australia, at the ACDIS conference, May 2019. [Download this document here.](#)
- ❑ “Using Metrics to Strengthen Relationships Between CDI Specialists and Physicians,” presented by Zachary S. Fainman, MD, medical director of care management and physician advisor, and Rebecca Hernandez, BSN, RN, CDI system manager at Advocate Lutheran General Hospital in Park Ridge, Illinois, at the ACDIS conference, May 2017. [Download this document here.](#)
- ❑ “Playing to Win: How to Engage Physicians in CDI,” presented by Nicole Fox, MD, MPH, FACS, CPE, medical director of pediatric trauma and medical director of CDI at Cooper University Hospital in Camden, New Jersey, at the ACDIS conference, May 2017. [Download this document here.](#)
- ❑ “How to Successfully Talk to Doctors about CDI,” presented by Claire E. O’Brien, BS, MD, medical director of continuum of care and primary care department chair at Salem Health in Salem, Oregon, at the ACDIS Conference, May 2016. [Download this document here.](#)
- ❑ “More than chocolate? Sweet provider education tips.” This article outlines some helpful tips and tricks from the ACDIS Advisory Board for engaging physicians in CDI. Published in the *CDI Journal*, July 2017. [Download this document here.](#)



- “Breaking through the noise: Successful physician engagement takes creativity.” This article outlines a number of creative ways ACDIS members have engaged and educated physicians in CDI. Published in the *CDI Journal*, July 2017. [Download this document here.](#)

Compliant provider queries

This is a broad topic with many nuances. Chose several volunteers to review the materials and to present what they learned to the group during the meeting. Chapter leaders may wish to reach out to a guidance author to see if they would be willing to speak to your group about the guidance. (Authors names are typically at the end of the document. A Google search or email to the ACDIS national team at info@acdis.org can usually locate the individual’s contact information.)

- Ask meeting participants to bring their own query policies and procedures. Divide into small teams of mixed facilities to review each others’ policies paying particular attention to items which owners particularly like or dislike about their own policies.
- Back in the large group, ask participants to discuss an item or anecdote about how they developed their policies physician(s) of the value of CDI.
- [ACDIS/AHIMA Guidelines for Achieving a Compliant Query Practice—2022 Update](#)
- [Sample queries and query policies](#) in the ACDIS Resource Library
- “Q&A: Establishing an escalation policy for inappropriate queries,” published in *CDI Strategies* on February 2, 2023
- “Case study: Construct a compliant query template,” published in the January/February 2023 edition of the *CDI Journal*
- “Q&A: ‘Unable to determine’ query responses and KPIs,” published in *CDI Strategies* on November 23, 2022
- “Physician engagement and moving CDI ‘upstream’,” published in April 2022

Tracking CDI metrics

Any program is only as successful as it can be shown to be. CDI managers need to track specialists’ productivity, query response rates, and other measures to illustrate that their efforts matter to the facility.

Chose several volunteers to review the materials and to present what they learned to the group during the meeting. Ask meeting participants to discuss their own tracking and review processes.

- “An eye toward continued competency,” published in the January/February 2023 edition of the *CDI Journal*
- “CDI staff audits,” the June 22, 2022, episode of the *ACDIS Podcast*
- “Key performance indicators: Proving efficacy, shining a light on opportunities,” published in the January/February 2022 edition of the *CDI Journal*
- “Redefining key performance indicators for clinical documentation integrity,” published in April 2020
- [The 2020 CDI Week Industry Overview Survey](#), published in September 2020, includes a lengthy section on key performance indicators
- [A sample audit tool](#) under the “Educational Tools” section of the Resource Library, donated by Lee Anne Landon, BSN, CCDS
- “Shifting Gears: The Value of Concurrent CDI Audits,” presented by Shawn MacPhee, MSN, RN, CCDS, CDIP, corporate director of CDI for McLaren Health Care based in Grand Blanc, Michigan, at the ACDIS conference, May 2022. [Download this document here.](#)
- “Auditing You Staff for Performance Improvement: Tips to Manage Underperformers,” presented by Rachel Mack, RN, MSN, CCDS, CDIP, and Kari Thie, RN, BSN, CCDS, at the ACDIS conference, May 2018. [Download this document here.](#)

CDI career ladder

Many CDI departments have a CDI career ladder in place that lays out a growth path for CDI specialists looking to



specialize in a particular type of review (e.g., quality, denials management, etc.) or grow into a leadership role (e.g., manager, team lead, etc.). Choose several volunteers to share their career ladder structures and their success stories. Presenters could also share how they pitched a career ladder to their organizational leadership and/or implemented the model successfully.

The ACDIS website also has a number of resources related to career ladder development that may be of use:

- [The 2022 CDI Salary Survey report](#), published in January 2023
- [“Guest column: A CDI career ladder can be so much more”](#) by C. Dawn Diven, RN, CCDS, CDIP, CCDS-O, published in the November/December edition of the *CDI Journal*
- [“Communication and investing in the future: Management soft skills,”](#) published in the January/February 2022 edition of the *CDI Journal*
- [“One rung at a time: CDI career ladders,”](#) published in the September/October 2020 edition of the *CDI Journal*
- [“Q&A: CDI career ladders,”](#) published in the May 7, 2020, edition of *CDI Strategies*
- [“Career ladders: Helping staff along their CDI journey,”](#) published in the July/August 2019 edition of the *CDI Journal*