

## ACDIS Forms and Tools Committee: Informational Documents

### ACDIS Contact

Linnea Archibald

Associate Editorial Director, ACDIS

ACDIS Leadership Council Membership Manager

Coordinator, ACDIS Forms and Tools Committee

[larchibald@acdis.org](mailto:larchibald@acdis.org)

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## Purpose and Terms of Service

### Objective

The Association of Clinical Documentation Integrity Specialists' (ACDIS) Forms and Tools Committee will evaluate the publication merit of field-sourced clinical documentation improvement materials (e.g., sample query forms, policies and procedures, educational documents, etc.) on a rolling basis and meet to discuss possible improvements to the submitted forms on an every-other-month basis. Through incisive individual feedback and group discussion, committee members will build ACDIS' living library of expert-vetted Forms and Tools from the ground up. To see what ACDIS currently has in the Resource Library, [click here](#).

Volunteer members will be sought annual in January during ACDIS' standard committee application period.

### Essential responsibilities

- Evaluate field-sourced materials for accuracy, compliance, relevance, and effectiveness
- Join fellow committee members and ACDIS editors on bimonthly conference calls to discuss the publication potential of submitted materials
- Provide feedback to accompany tools selected for publication to help the ACDIS community understand what makes a given tool so effective and how to adapt it for use in other environments (can be done verbally during the conference calls or over email)
- Contribute materials for committee review and encourage other professionals to do the same
- Provide insight into current industry needs, evaluate opportunities and gaps in the library's contents, and help chart the overall trajectory of committee activity
- Contribute to other committee efforts as interest, expertise, and availability permit

### Code of professional conduct

Forms and Tools Committee members are expected to exercise professionalism, diplomacy, and discretion when evaluating field-sourced materials and conducting all other committee work.

While files under committee review may contain identifying information about the contributing individual and/or organization, members should restrict focus, feedback, and discussion to the contents of the tool at hand and should avoid remarking generally on the contributor(s) or the value of their overarching approaches. Given the potential presence of identifying information, committee members must also ensure that any current or prior relationship with a tool contributor or stakeholder doesn't affect their judgment regarding a given material's publication merit. Committee members who believe they have a conflict of interest that prevents them from rendering an impartial opinion in this regard should inform the coordinator, who will adjust the review activity accordingly.

Finally, committee members must refrain from discussing or disseminating any materials under review outside of the committee context while the forms are under consideration. When they have been approved for publication by the committee, committee members may adapt the tools for use at their own facilities just as any other ACDIS member may.

### Term duration and prerogatives

Forms and Tools Committee membership will be evaluated annually, and reappointment decisions will be rendered based on editorial needs, as well as on the given committee member's past contributions and continued desire to serve.

Committee members may not serve more than a three-year period. After at least a one-year hiatus, an individual may volunteer to serve on the committee at the discretion of the coordinator and ACDIS administration.

Those needing to step down from volunteer duties due to a change in position, family obligations, or other matter may do so at any time but should provide at least 30-day advance notice to the coordinator to maintain continuity of the group and to allow a replacement volunteer to be identified.

Any volunteer who does not fulfill the expectations of the committee and does not communicate with the coordinator or ACDIS administration over two cycles (four months' time and two committee meetings) may be asked to step aside to allow a new volunteer to be chosen to maintain the continuity of the work.

In return for their important work, active committee members will receive the following benefits for the duration of their service:

- Public recognition on the ACDIS site's [Boards and Committees](#) page
- Discounted and/or complimentary access to products such as ACDIS books or webinars at the discretion of the coordinator and ACDIS administration

ACDIS members in good standing may apply to serve on the committee. Volunteers will be sought every October with responsibilities beginning in January. For additional information, please contact ACDIS Associate Editorial Director Linnea Archibald ([larchibald@acdis.org](mailto:larchibald@acdis.org)).

## Scope of Work and Material Review Process

On a rolling basis, the Forms and Tools Committee will review field-sourced materials (“tools”) according to the process outlined hereafter. Tools chosen for committee review may or may not have already been published on the ACDIS site and/or in related publications. Should the form’s fitness for publication be questioned, the committee will discuss its merits and deficiencies during bimonthly meetings.

Note: All descriptions of review activities, including projected time frames and tool volumes, are approximations. The scope of the committee’s work may vary between quarters depending on the spectrum, volume, and review status of tools in the pipeline, specific editorial needs and emphases at the time, and other variables. That said, the coordinator will modulate the review cycle as necessary to ensure the committee’s workload remains balanced and manageable throughout the year.

### Stage 1: Review Process

The committee coordinator will send the committee members 3-5 forms at a time on a rolling basis. The committee members will then fill out an accompanying survey about each form, rating its various merits on a scale of 1-5, and ultimately recommending whether or not the form should be published.

If the committee is divided on whether or not a given form should be published on the ACDIS website, the form will be held and discussed at the next committee meeting in order to reach a publication decision.

Once the chosen forms and tools have been published to the ACDIS Resource Library, the committee coordinator will email the committee members with the links and encourage them to peruse the new offerings and make sure they accurately reflect the committee members’ decisions.

### Stage 2: Committee conference calls

Committee members will participate in bimonthly conference calls with the committee coordinator to review any forms and tools on which a publication decision was not reached during the rolling review stage.

The committee coordinator will schedule the meetings at least one month in advance and send out a tentative agenda at least 48 hours before the scheduled meeting time, along with the documents under discussion.

On the day of the call, committee members should come prepared to share their thoughts about each item under consideration and their reasons for recommending publication or not. At the conclusion of the discussion, the committee members will vote on whether a form should be:

1. Published as is,
2. Sent back to the contributor for revisions, or
3. Rejected from publication

Following the call, the committee coordinator will send around meeting minutes, the final decisions for each form and tool, and any follow-up items to be completed.

### Ongoing duties

Although the Forms and Tools Committee's major review activities are cyclical, committee members are encouraged to remain engaged in their ACDIS library development work throughout the year. The following are key ways to keep active:

- Submit tools for fellow committee members to evaluate and encourage those in your professional network to do the same.
  - The ACDIS team is particularly interested in expanding the library's focus on CDI in non-traditional settings (e.g., outpatient, pediatrics, long-term care, rehab, critical access hospitals, etc.) and sample query forms for common diagnoses.
- Look for gaps, discrepancies, and other potential deficiencies in the ACDIS resource library, and inform the committee coordinator of opportunities to bolster relevant offerings.
- Share suggestions for improving the effectiveness and efficiency of the committee's review process and/or the quality of its work product.

Direct all tool submissions and related feedback to ACDIS Associate Editorial Director and Committee Coordinator Linnea Archibald at [larchibald@acdis.org](mailto:larchibald@acdis.org).