## Meetings in a can

As poet Robert Burns wrote, *“The best laid plans of mice and men often go awry.”* A planned speaker may have travel trouble at the last minute or a downloaded audio conference 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 members on its website [www.acdis.org](http://www.acdis.org/) 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.

### [Download a PDF of the ACDIS Code of Ethics](http://www.hcpro.com/content/282245.pdf). Compare against the [AHIMA Code of Ethics](http://www.ahima.org/about/ethicscode.aspx) and its [*Ethical Standards for Clinical Documentation Improvement.*](http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_047842.hcsp)

### 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.

* View this 9-minute video from Kindred Healthcare, created to help ACDIS celebrate the first annual CDI Week in 2011. <http://www.youtube.com/watch?v=2S0KEN8QDvY>
* View this 2-minute video from Forsythe Medical created to help its physicians understand the importance of their CDI program. <http://www.youtube.com/watch?v=lGsiiqJWPms>
* This PowerPoint presentation by James Kennedy, MD, past ACDIS Advisory Board Member, was created to celebrate the first annual CDI Week. Press F5 to listen to the associated audio. [CDI: What is it, why does it matter?](http://www.hcpro.com/content/270972.ppt)
* 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](https://acdis.org/articles/archive?publication=1).
* This ACDIS White Paper discusses the importance of building a foundation for your CDI program: [“Cornerstone of CDI success: Build a strong foundation.”](http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_047842.hcsp)

**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.
* Ask participants to share their experiences studying for, and taking the exam.
* Review the [free Certification Candidate’s Handbook](https://acdis.org/sites/acdis/files/2017%20Handbook%20010317A.pdf)
* Request a copy of [*The CCDS Exam Study Guide*](http://hcmarketplace.com/ccds-exam-study-guide-3rd-edition)to review and/or use as a raffle item.
* Invite ACDIS CCDS Coordinator and Member Services Specialist Penny Richards to be a guest speaker to review the application, testing, and recertification process by emailing prichards@acdis.org.

**ACDIS 101**

Local Chapter members do not need to be ACDIS national members. However, Local Chapter members do 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>
* Download the 60-minute webinar tour of the ACDIS site at <http://content.hcpro.com/webcasts/mp4/acdis/hcpro_110712.mp4>
* Arrange a virtual visit with ACDIS Associate Director Melissa Varnavas by emailing her at mvarnavas@acdis.org.

**Getting ‘buy-in’ from physicians**

The following PowerPoint presentations and *CDI Journal* articles can be used to foster conversation regarding obtaining physician 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” physician(s) of the value of CDI.

* “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. Presented at the ACDIS Conference, May 2017. [Download this document here](https://acdis.org/resources/2017-conference-day-2-track-3-using-metrics-strengthen-relationships-between-cdi).
* “Query for Success: Tips, Techniques, and Strategies to Ensure Physician Engagement and Reduce Risk,” presented by Sheila M. Duhon, MBA, RN, CCDS, A-CCRN, national director of CDI education at Tenet Healthcare in Dallas, and Patricia Ann Fountain, BS, RN, MBA, CCDS, regional director of CDI at Tenet Healthcare, New England and Chicago markets. Presented at the ACDIS Conference, May 2017. [Download this document here](https://acdis.org/resources/2017-conference-day-2-track-1-query-success-tips-techniques-and-strategies-ensure).
* “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. Presented at the ACDIS Conference, May 2017. [Download this document here](https://acdis.org/resources/2017-conference-day-3-track-3-playing-win-how-engage-physicians-cdi).
* “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. Presented at the ACDIS Conference, May 2016. [Download this document here](https://acdis.org/resources/2016-conference-track-1-how-successfully-talk-doctors-about-cdi).
* “Doc for Docs: Giving the Talk to Physicians,” presented by Jonathan L. Elion, MD, FACC, president and CEO at ChartWise Medical Systems and clinical associate professor of medicine at Brown University in Wakefield, Rhode Island. Presented at the ACDIS Conference, May 2015. [Download the document here](https://acdis.org/resources/2015-conference-track-1doc-docs-giving-talk-physicians).
* “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](https://acdis.org/articles/more-chocolate-sweet-provider-education-tips).
* “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](https://acdis.org/articles/breaking-through-noise-successful-physician-engagement-takes-creativity).
* “Hit docs where it matters most—in their wallets!” by Trey La Charité, MD, FACP, SFHM, CCS, CCDS. In this article Dr. La Charité outlines ways in which CDI specialists can reach physicians using their own reimbursement as a tool. Published in the *CDI Journal,* July 2017. [Download this document here](https://acdis.org/articles/physician-advisor-corner-hit-docs-where-it-matters-most%E2%80%94-their-wallets).
* This PowerPoint presentation from Kindred Healthcare was donated to ACDIS to help celebrate the first annual CDI Week in 2011. [What's in it for the physician training](http://www.hcpro.com/content/269829.ppt).

**Compliant Physician 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 he/she 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 ACDIS Associate Director Melissa Varnavas 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](http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_050018.hcsp?dDocName=bok1_050018).” Journal of AHIMA 84, no.2 (February 2013): 50-53.
* AHIMA. "Managing an Effective Query Process." Journal of AHIMA 79, no.10 (October 2008): 83-88. <http://tinyurl.com/c7zafe5>
* AHIMA. "Guidance for Clinical Documentation Improvement Programs." Journal of AHIMA 81, no.5 (May 2010): expanded web version. <http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_047343.hcsp?dDocName=bok1_047343>
* AHIMA. “Clinical Documentation Improvement Tool Kit.” 2010. <http://library.ahima.org/xpedio/groups/public/documents/ahima/bok1_047343.hcsp?dDocName=bok1_047343>
* ACDIS Resource Library. Sample inpatient query policy. Donald A. Butler, manager of CDI at Vidant Medical Center in Greenville, NC. [Download this document](http://www.hcpro.com/content/280693.doc) here.
* ACDIS. May 2017. “The 2017 Physician Query Benchmarking Report.” ACDIS examines how CDI programs conduct their query practices, the results stand as a baseline from which programs could define common query activities. [Download this document here](https://acdis.org/resources/2017-physician-queries-benchmarking-survey).
* ACDIS. CDI Journal. July 2009. “Establish physician query protocols to resolve compliance risks.” Creating policies and procedures for your query processes is one way to help eliminate risk. [Download this document here](http://www.hcpro.com/content/235435.pdf).
* Related article: [“Update physician query policy in light of new AHIMA practice brief.”](http://www.hcpro.com/acdis/details.cfm?content_id=225926)
* Related product: [The Essential CDI Guide to Provider Queries](http://hcmarketplace.com/essential-cdi-guide-to-provider-queries).

**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.

* ACDIS. July 2011. “White Paper: Audit your CDI program to avoid pitfalls.” Donald A. Butler, RN, BSN, manager of CDI at Vidant Medical Center in Greenville, NC, outlines methods for CDI programs to conduct effective reviews of their CDI practices. [Download this document](http://www.hcpro.com/content/268350.pdf)
* A sample [audit tool for documentation assessment for medical necessity](https://acdis.org/resources/audit-tool-documentation-assessment-template-medical-necessity) under the Policies & Procedures tab in the Resource Library.
* A sample audit tool for [query compliance and peer reviews](https://acdis.org/resources/audit-tool-checklist-query-compliance-and-peer-review) under the Policies & Procedures tab in the Resource Library.
* CDI Week Q&A, 2011: Data Mining. [Download this document.](http://www.hcpro.com/content/271009.pdf)
* ACDIS Conference, 2012. “Metrics: Measuring the Impact of CDI and Coder Contributions.” Eric Ryland, RHIA, CHDA, CCS, CPC, Manager of Coding at Denver (CO) Health Medical Center. [Download this document](http://www.hcpro.com/content/280198.ppt)
* ACDIS Conference, 2012. “Using Data to Recharge Your CDI Program” by Elizabeth Bonetti, RN, MA, MS, account management manager will Dell Services Revenue Cycle Solutions and co-manager of the revenue cycle at Brooklyn Hospital Center in New York. [Download this document](http://www.hcpro.com/content/264884.ppt)

**Severity of Illness/Risk of Mortality**

CDI specialists’ role in obtaining documentation related to severity of illness and risk of mortality is an emerging topic. Ask meeting participants to discuss how they incorporate these measures at their facilities. Ask volunteers to review the following articles and PowerPoint presentations and share what they learn with the group.

* ACDIS, CDI Journal March 1, 2017. “Pneumonia coding critical for severity, risk capture.” [Download this document here](https://acdis.org/articles/pneumonia-coding-critical-severity-risk-capture).
* ACDIS. CDI Journal April 1, 2010. “A quality role: Consider core measure review as the second act for CDI.” [Download this document](http://www.hcpro.com/content/248956.pdf)
* CDI Week Q&A 2011. CDI & Quality. [Download this document.](http://www.hcpro.com/content/271008.pdf)
* ACDIS Conference 2016. “SOI/ROM: The Increasing Importance of Risk-Adjusted Metrics,” by Kathryn Good, RN, BSN, CCS, CCDS, CDI program coordinator at Flagstaff Medical Center in Flagstaff, Arizona, and Laura Saldivar, CCS, CPC, COC, DRG auditor at Connolly IHT in Gilbert, Arizona. [Download this document here](https://acdis.org/resources/2016-conference-track-3-soirom-increasing-importance-risk-adjusted-metrics).
* ACDIS Conference 2014. “SOI/ROM Queries: Why is that ‘Healthy’ Patient Dead in the Bed?” by Sara Baine, MSN-Ed, CCDS, CDI consultant at MedPartnersHIM, and Rhonda Peppers, RN, BS, CCDS, CDI consultant at MedPartnersHIM. [Download this document here](https://acdis.org/resources/2014-conference-track-3soirom-queries-why-%E2%80%99healthy%E2%80%99-patient-dead-bed).
* ACDIS Conference, 2010. “The Power of Case Studies: Death Review and SOI/ROM,” by Cheryl Ericson, MS, RN, Manager of Clinical Documentation Integrity and Utilization Review at Medical University of South Carolina. [Download this document](http://www.hcpro.com/content/252598.ppt)