ACDIS Leadership Council June Meeting Agenda

Date: Friday, June 3, 2-3:10 p.m. eastern
Location: GoToWebinar virtual meeting. Claim your spot:
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In addition to submitting questions and comments in advance at the above link, meeting participants can contribute to the conversation in real time via the GoToWebinar chat pod. We'll pause to address chat-pod feedback after each major agenda item.

Unable to attend? Register anyway to share your agenda questions and comments for potential inclusion in the discussion. Following the live meeting, on-demand materials, including the recording and slide deck, will be published to the "Council Resources" area of ACDIS site. Members will be alerted by email once materials are available.

Moderator:
- Linnea Archibald, ACDIS associate editorial director and Council membership manager

Panelists:
- Marlene Goodwin-Escola, RN, MSN, CV-BC, NE-BC, CDI director at Jupiter Medical Center in Florida
- Kristine Green, MSN, RN, VP of clinical documentation at Northwestern Memorial HealthCare in Chicago, Illinois
- Joe Sciandra, senior manager of consulting services, HIS consulting operations, at 3M Health Information Systems in Cumming, Georgia

Agenda:
- **Item 1:** Council updates and reminders.
- **Item 2:** Council member panel discussion on survey findings related to staff bandwidth and growth.
- **Item 3:** Wrap up, on-demand material instructions, and CEU information.

Agenda and speakers subject to change.

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Discussion synopsis:
- After two-plus years of tight educational and staffing budgets, the CDI field is undergoing a bit of a hiring boom, allowing teams to expand to new review areas and deepen their existing review areas. Determining when to hire and how to orient and train new staff members can be a challenging job, though. Of course, hiring and training new staff cannot take the place of continued engagement with your existing team—often remotely—and the myriad of other responsibilities leaders' hold.

  In our recent CDI Leadership Council survey, sponsored by 3M Health Information Systems, we explore the current state of CDI staffing levels, hiring trends, new staff orientation methods, technology's impact on CDI, and team collaboration. During today's panel discussion, we'll take a closer look at the survey data and discuss how real-life CDI leaders approach staffing and staff engagement.

In this session, the ACDIS Leadership Council panelists will explore the following topic areas:
- Introduction of panelists
- Panel discussion:
  - Current state of CDI staffing
  - 2022 hiring plans
  - New staff orientation and education
  - Technology's impact of CDI work
  - CDI team collaboration and interaction
- Panelist Q&A

In this session, Leadership Council panelists will explore the following questions:
- Nearly 69% of respondents said they are currently understaffed; conversely, nearly 31% said they feel their staffing is adequate.
  - *How do you determine what "adequate" staffing means for your department? When is it time to grow your team?*
  - *When combined with the slashed budgets resulting from the COVID-19 pandemic, the staffing challenges can keep departments from expanding to new review areas (e.g., outpatient). As departments are able to hire new staff, we would expect to see an increase in expansion as well. What role does staffing play in your decision to expand or not? How do you determine how many staff members are needed for expansion?*

- According to the survey, 62.56% of respondents had already hired new staff at the time of the survey in January. Additionally, another 14.43% had hired contract or outsources staff already. Another 15.17% planned to hire more staff at the time of this survey but hadn't yet.
  - *This hiring boom means there's a lot of movement in the profession—individuals are changing organizations, going to vendor or consultant organizations, etc. Plus, there's an increase in brand-new CDI professionals entering the profession. When you're looking to hire new staff, do you look primarily for those with previous CDI experience or are you willing to train them entirely on the job?*

Questions? Email Associate Editorial Director Linnea Archibald at larchibald@acdis.org.

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- o *How do you go about justifying new staff positions to your organizational leadership? What steps do you have to take to actually recruit and hire new staff members?*
  o *Beyond specific experience and potentially credential types, what attributes do you look for in a potential new hire? How do you evaluate those characteristics during the recruitment and interview process?*

- The most common way to handle new staff education, according to survey respondents, is through an in-house developed orientation program with 81.52% saying they use this method. Many respondents, however, use a combination of the methods including having new hires shadow senior CDI staff (62%), assigning preceptors to new hires (42%), employing dedicated CDI educators (40%), and using education provided by a vendor or consultant (38%). Respondents' comments show that those efforts have a specific order too. For example, one comment mentioned that they assign preceptors, but only after the initial orientation period.
  o *What methods do you use to educate and orient new staff members? How does it differ depending on their professional background type (coding/HIM vs. nursing vs. foreign medical)?*
  o *How long does it typically take for a new staff member to get fully up-to-speed in their role? What ongoing education do you offer them after the initial orientation phase?*
  o *Do you have a dedicated CDI educator on your team? What other responsibilities do they hold beyond orienting new staff?*

- Unsurprisingly given that most CDI programs are now at least partially remote, the biggest impact of technology survey respondents reported was that technology has allowed them to perform more work remotely (87.68%). Nearly 66% of the respondents cited increased ability to measure and show the impact of their program as an impact from technology too. Though not a *huge* percentage, it is significant that 14.69% of respondents said some of their CDI team members view technology as a way to replace their jobs.
  o *Since you started in the CDI field, how have you seen the technological landscape change? In what ways do you think it's made your job as a leader easier or harder?*
  o *We always hear that CDI leaders need to work with their software vendor to customize their tools to get the most benefit. Have you done this before? If so, how did you approach that conversation and express your department's needs?*
  o *When we asked a similar question in 2021, only 10% of respondents said some team members felt technology was a way to replace their jobs. Why do you think there was an increase year-over-year? Do you see this concern as valid? Why or why not?*

- Most survey respondents reported interacting with staff remotely or both in-person and remotely. Though budgets may have increased for hiring and in some cases for education, budget for things like staff lunches is still tight: Nearly 33% of respondents said they don't interact in this way at all.
  o *When it comes to more formal discussions surrounding performance or educational opportunities, do you find these conversations are best conducted in-person or virtually (if you have an option to choose)? Do you have recurring meetings with your team for education and performance or do you address these conversations on a case-by-case basis?*

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- o *If your team is largely or entirely remote now, how do you approach staff engagement and ensure your staff still feels like they're part of a team? Without budget for staff lunches or other non-educational engagement opportunities, what do you suggest leaders do to encourage team camaraderie?*