



Community Meeting

October 8, 2021

Presenter: Council Leadership



Linnea Archibald

**ACDIS Associate Editorial Director,
Publications & Membership**

Linnea Archibald oversees management and strategic development of the ACDIS Leadership Council and is responsible for ACDIS' publications, managing the Forms & Tools Library Committee, overseeing CDI Week activities, and running the brand-new ACDIS CDI Scholarship Program. If you've ever interacted with ACDIS on social media, read one of ACDIS' publications, or reviewed resources on the ACDIS website, you've likely seen her name before.

Agenda

- Welcome to new members and overview of Council benefits, meeting structure, and involvement opportunities
- Council member presentations on:
 - Magnet model principals and shared leadership for CDI departments (Carrie Willmer, BS, BSN, RN, CCDS, CDIP)
 - CDI career ladders for professional development (Dawn Diven, BSN, RN, CCDS, CCDS-O, CDIP)



Council Overview and Opportunities

Who are the Council members?

- The ACDIS Leadership Council (founded in 2019) exists to connect forward-thinking CDI supervisors, managers, and directors through personalized insight-sharing and networking experiences that forge valuable relationships, advance strategic priorities, and illuminate game-changing trends.
- This term includes 270 members from 47 states.
- The largest portion of our members (38%) are CDI managers, followed by CDI directors (30%), and CDI supervisors (11.5%).
- 68% of Council members hold an RN credential; 20% hold either an RHIA or RHIT credential.
- 72% hold their CCDS credential and 21% hold the CDIP.
- Most (68%) work for healthcare systems with multiple sites, followed by 28% who work at standalone acute care hospitals.

Council benefits

- Entry to a members-only online community on the ACDIS website, accessible by using your existing ACDIS website login credentials. This access includes access to all the previous on-demand meeting recordings, a special Council member Forum thread, and articles specific for Council members
- Access to Council survey and research findings, plus the opportunity to submit questions for review and potential inclusion in future surveys
- Regular virtual meetings to unpack the latest Council research findings, swap leadership strategies and best practices, and discuss industry developments
- The CDI Leadership Insider (CLI), our official eNewsletter for Council members that goes out the second Monday of each month
- Special discounts on new ACDIS memberships and selected leadership offerings
- A membership email signature badge to show your Council membership on all your email correspondence
- Opportunities to earn ACDIS CCDS/CCDS-O continuing education credits

Council participation requirements

- Council members must participate in 75% of the Council surveys in order to be eligible for automatic renewal in the next year
 - Surveys will be sent via email and several reminders will be sent before the survey closes
 - In order to receive credit for the surveys, Council members must do the following
 - Complete their contact information; this is the only way we can track your participation concretely
 - Optional: When Council members complete the survey, they will receive a certificate of completion at the end of the survey. Council members are encouraged to save this certificate to their files as an additional verification point.

Council participation requirements, cont.

- Council surveys:
 - Please note that the surveys required to meet the participation requirements are NOT the same as the form members fill out to register for Council meetings
 - Most surveys will take roughly 10 minutes to complete and will be launched quarterly
- Council members must stay actively involved in the CDI profession and employed by a healthcare facility or system (as opposed to a consulting firm or vendor organization) for the duration of their term to remain eligible
 - If the circumstances of your role change, please contact Associate Editorial Director Linnea Archibald (larchibald@acdis.org) immediately.

Council meeting schedule

- Council meetings will take place the second Friday of each meeting month from 2-3:10 p.m. eastern. All Council meetings have been scheduled for the 2021/2022 term.
- Council members can register for any of these meetings by following the links on [the ACDIS website here](#).
- Linnea Archibald sent out calendar holds for all 2021/2022 meetings this week to mark the time on your calendars.
 - Note that topics and panelists will be chosen closer to the meeting dates; members can suggest meeting topics by [clicking here](#).
- Can't attend live? The meeting recording and materials will be made available within 24 hours of the live call date.

Council CEU opportunities

- Council members can earn ACDIS CCDS/CCDS-O CEUs by participating in a number of ways:
 - **Attend an ACDIS Leadership Council virtual community meeting:** The CEU will be emailed to all qualifying participants after the on-demand period has closed two weeks after the live call date. To qualify, Council members must either attend the full, live meeting, or view the full, on-demand meeting recording within two weeks of the meeting's live broadcast.
 - **Present on a CDI-related topic during a Council full-group virtual meeting:** Council members may claim 2 CEUs for each full-group virtual meeting in which they speak as a panelist or presenter. Note: these CEUs are in lieu of the 1 credit awarded to meeting attendees.
 - **Write for the CLI:** Council members may claim 0.5 CEUs per 350 published words of their original work featured in the CLI. Council members can submit an idea by [clicking here](#).

Leadership Council Mastermind

- The Council Mastermind group is a tightknit group of eight to 10 handpicked Council members who commit to:
 - Advancing concrete business goals, and
 - Helping their peers do the same by sharing challenges, strategy, and accountability through a combination of virtual and in-person meetings
- During discussions, members serve as both advisor and advisee
- Mastermind membership runs from November through August each term and members meet six times throughout the term
- In order to be eligible, Council members must have completed one term of Council membership and met the participation requirements.
 - Please note that the 2021/2022 Mastermind members will be selected and notified in the next few days.

What's next?

- 10/11/2021: Next issue of **CLI** hits your inbox
- Q4 2021
 - The first survey of the 2021/2022 Council term is live now! Please respond to the 2021 CDI Salary Survey today to receive credit. The survey will close at 11:59 p.m. on Sunday, October 31. [Click here to respond](#).
 - Those who are attending the 2021 ACDIS conference in Dallas this October are invited to attend a special Council breakfast. Registration is currently closed, but Linnea Archibald will notify members should additional space become available.
 - Register for the December 10, 2021, Council meeting on [the ACDIS website](#). The topic will be the Council-specific findings from the Salary Survey.
- Go to the “Current Council Member Info” page on the ACDIS website for more updates. ([Link](#))



Community meeting reminders

- Earning CEUs for participating in live or on-demand shows
 - *Note: All participating Council members, whether they joined the meeting live or listened to the on-demand version, will receive their CEU AFTER the on-demand period closes (two weeks after the live broadcast date).*
 - Accessing 2020/2021 term on-demand materials
 - [September 29, 2020, meeting materials](#)
 - [December 11, 2020, meeting materials](#)
 - [February 26, 2021, meeting materials](#)
 - [April 9, 2021, meeting materials](#)
 - [May 12, 2021, meeting materials](#)
 - [June 11, 2021, meeting materials](#)
 - [August 13, 2021, meeting materials](#)
 - Email communications about meetings will generally come “from” Linnea Archibald or Melissa Varnavas. Reply to Linnea Archibald with any questions.
- >> Get the full rundown on community meetings: <https://acdis.org/acdis-leadership-council/full-group-meetings>

Tips for ensuring Council communications reach you

- When responding to meeting invites, surveys, and other Council opportunities:
 - Be consistent and accurate when entering your info (name and email address)
 - Use the same email address; double check for typos
 - Use your full name, not a nickname; double check for typos or inconsistencies (e.g., alternating between a space and a dash in a hyphenated last name)
- Email Linnea Archibald (larchibald@acdis.org) if your primary email address or any other key professional detail changes.
- Whitelist the CLI send address (acdis-lc@e.news.hcpro.com). Still having trouble?
 - Check the inboxes of any alternate email addresses you might have entered into early Council surveys—the primary email address we have on file for each Council member is where your CLI issue is going
 - Check your deleted items folder and spam filter to ensure CLI isn't getting trapped



Council member presentations

Magnet model principals and shared leadership for CDI departments by Carrie Willmer, BS, BSN, RN, CCDS, CDIP

CDI career ladders for professional development by Dawn Diven, BSN, RN, CCDS, CCDS-O, CDIP

Presenters: Council Members



Carrie Willmer, BS, BSN, RN, CCDS, CDIP
Director, CDI
SCL Health
Broomfield, Colorado



Dawn Diven, BSN, RN, CCDS, CCDS-O, CDIP
Director, CDI
West Virginia University Medicine
Morgantown, West Virginia



Magnet Model Principles, Shared Leadership for CDI Departments

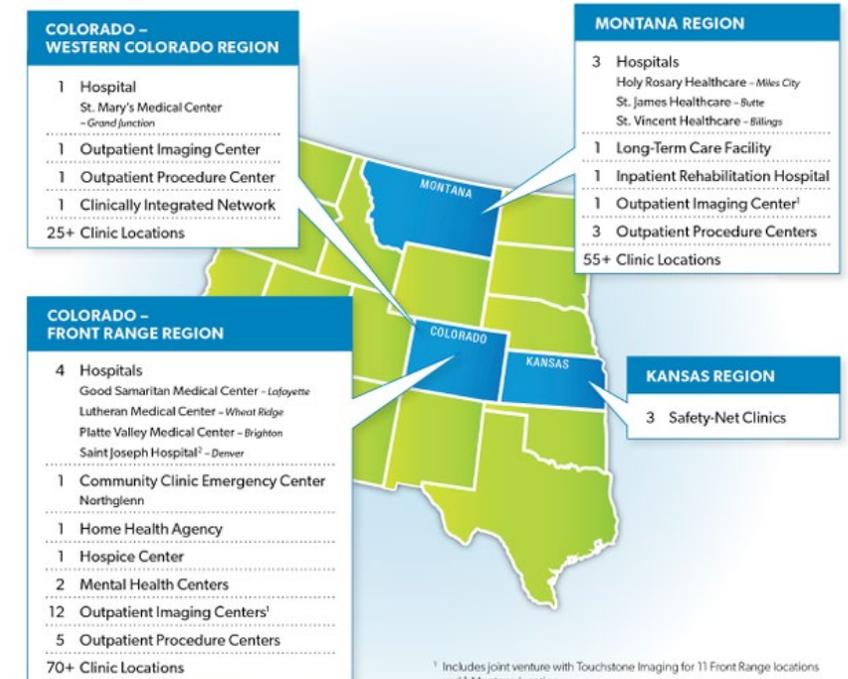
Carrie Willmer, BS, BSN, RN, CCDS, CDIP

SCL Health, clinical documentation integrity

- 7 acute care facilities
 - Montana x2
 - Colorado x5
- 38 FTEs
 - 26 CDI specialists
 - 1 director
 - 2 managers
 - 2 leads
 - 2 educators
 - 4 auditors (denials, data analyst, auditing)
 - 1 coding liaison



(As of October 2020)



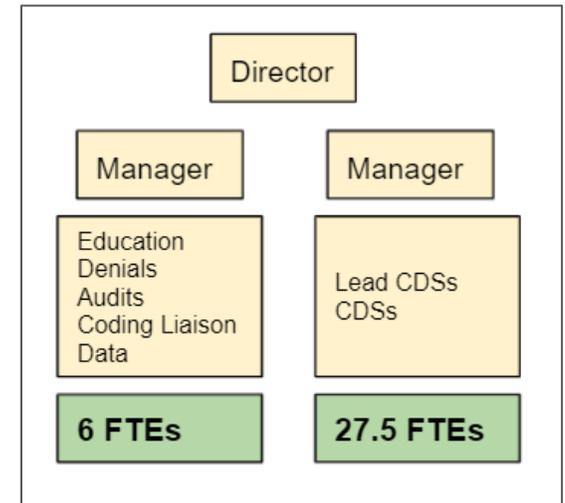
¹ Includes joint venture with Touchstone Imaging for 11 Front Range locations and 1 Montana location

² Joint operating agreement with National Jewish Health

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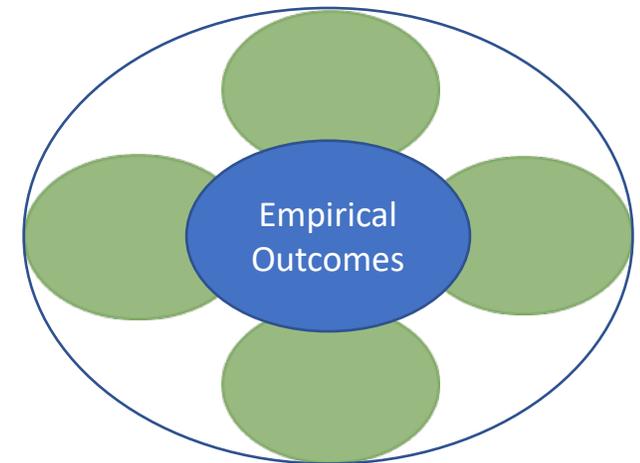
Situation: December 2019

- 2019 leadership changes
 - Director promoted to VP of HIM
 - 1 manager resigned
 - 1 manager promoted to director
- Initial assessment, December 2019
 - Manager vacancies
 - Unbalanced organizational structure
 - Unbalanced workloads
 - Lacking opportunities for professional growth & development
 - Ongoing turnover of CDI specialist positions
 - 2013-2019: **62 new CDI staff + 23 contract staff**
 - Only 5 contract staff converted to permanent associates



ANCC Magnet Recognition Program

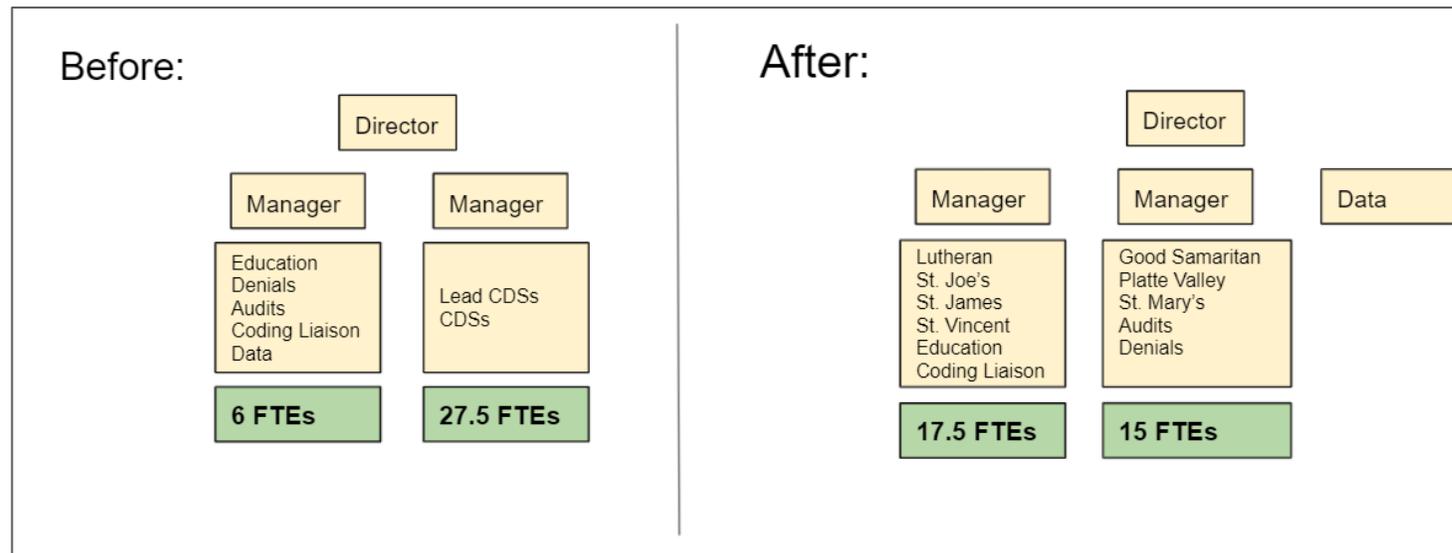
- A recognition program for organizations that successfully align nursing and interprofessional teams through a culture that achieves quality patient outcomes, first developed in 1983.
- 5 components
 - Structural empowerment (SE)
 - Exemplary professional practice (EP)
 - New knowledge, innovations, & improvements (NK)
 - Transformational leadership (TL)
 - Empirical outcomes (EO)



<https://www.nursingworld.org/organizational-programs/magnet/magnet-model/>

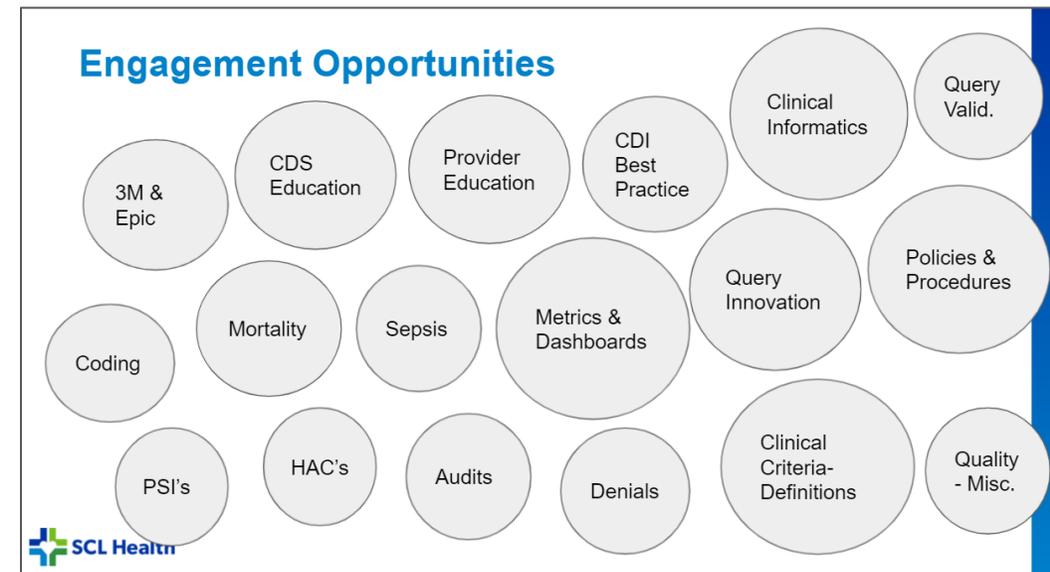
Priority #1: Balance the organizational structure

- Objectives:
 - Increase accessibility to manager
 - Support cohesion; balance perception of control
- Components: SE, TL



Priority #2: Implement CDI project teams

- Objectives:
 - Increase participation and perspective of the work of CDI beyond chart review
 - Support cohesion; balance workload and perception of control
 - Increase networking across the department
 - Engage individuals in areas of interest & build upon strengths; Build best practices
- Process:
 - Performed interest survey across team
 - Analyzed results to prioritize areas of focus & interests
 - 7 project teams
 - Leads, auditors, educators leading each team
- Components: SE, TL, NK, EP, EO



Priority #3: Improve communication & transparency

- Objectives:
 - Increase awareness of the “behind the scenes” of CDI
 - Build trust between new leaders and each other
 - Foster a stronger sense of contribution to the organization
 - Engage individuals in areas of interest & build upon strengths; Build best practices
- Process:
 - Project team report-outs through weekly education, huddles, or staff meetings
 - Incorporated an open Q&A time into weekly education cadence
 - Weekly director updates, written
 - HIM chats and quarterly townhall meetings
- Components: TL, SE, NK, EP, EO

Priority #4: Implement CDI specialist case review presentations

- Objectives:
 - Increase material development and presentation skills for CDI specialists
 - Enhance CDI specialist working relationships
 - Engage individuals in areas of interest & build upon strengths; Build best practices
- Process:
 - Developed an annual performance goal expectation: minimum 1 per quarter
 - Identified a variety of forums to select from based upon comfort level
 - Developed a template to help structure presentation content
- Components: NK, EP, SE, TL, EO

Outcomes since January 2020

- Successful roll-out of prioritization
- 40% increase in financial impact
- 50% decrease in staff turnover
- Staff engagement scores
 - Engagement indicator: 4.3 to 4.44
 - Employee score: 4.15 to 4.24
 - Manager score: 4.20 to 4.28
 - Resilience index: 4.25 to 4.31
 - Activation: 4.39 to 4.60
- Words from the team:
 - “I see one of our program's most significant accomplishments as being the way the team has become more involved in many different projects and learning opportunities. I think this has *helped to solidify the foundation as well as provide much encouragement and value to the individuals on our team.*”
 - “Our team has grown with the innovative ways they {leadership} have *included everyone and gave a sense of value.*”
 - “This year has been a great year for team building. CDI’s participation in the various group projects and their presentation on these has *made our team stronger and allowed for others to shine/excel in project opportunities outside of their normal day to day work.*”



CDI Career Ladders for Professional Development

Dawn Diven, BSN, RN, CCDS, CCDS-O, CDIP

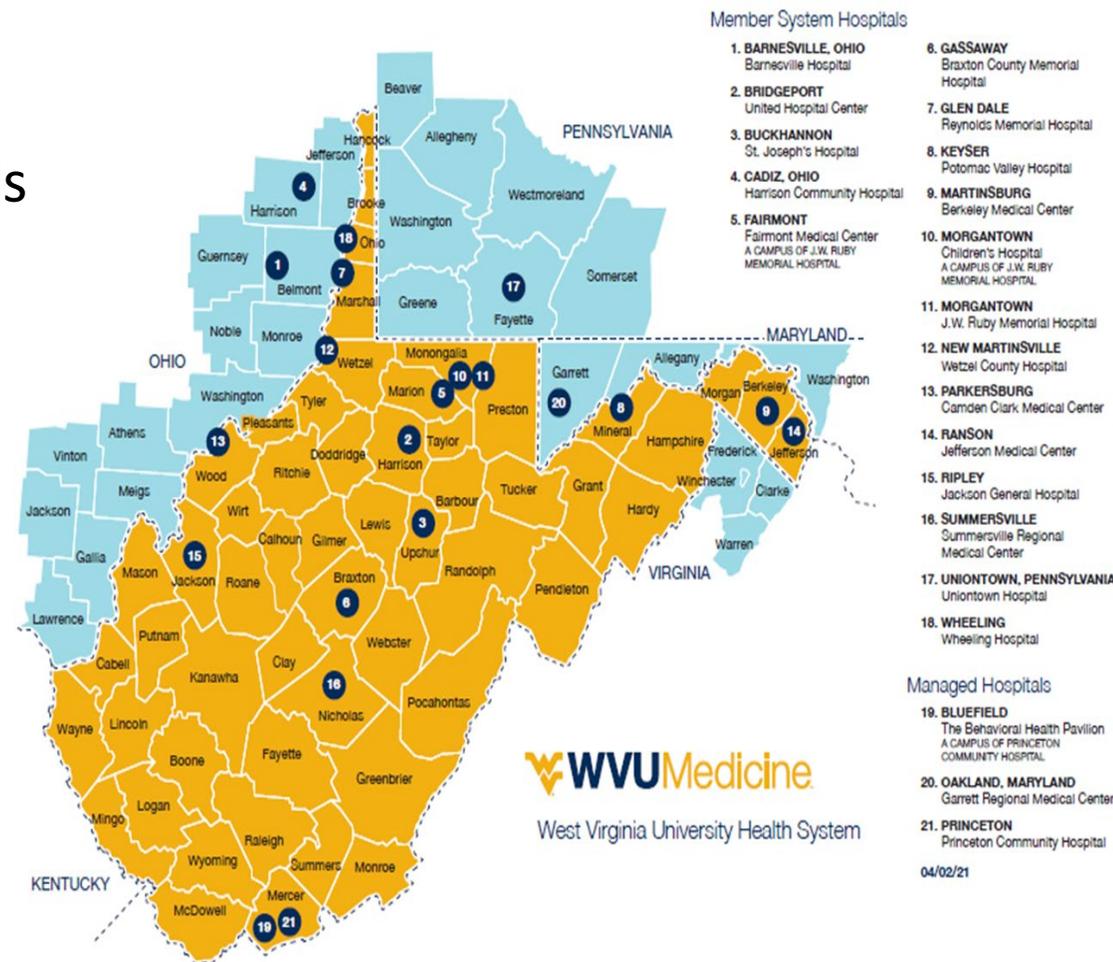


West Virginia University Medicine A CDI CAREER LADDER

Encouraging Professional Development
and Growing Leadership From Within
While Positively Impacting Your Program
and Organization

West Virginia University Medicine CDI team current covers:

- 1 -700-bed academic facility
- 4- @200-bed acute care community hospitals
- Ambulatory family medicine clinics
- 21 inpatient CDI
- 2 outpatient CDI
- 2 managers
- 1 educator
- 1 director



Proposal for a CDI career ladder definition

Harnessing the inherent curious nature of clinical documentation integrity specialists to encourage professional growth, energize your team into owning their program and the buy-in for success while simultaneously having a positive impact on that program and your organization.

...Take that *Merriam-Webster!*

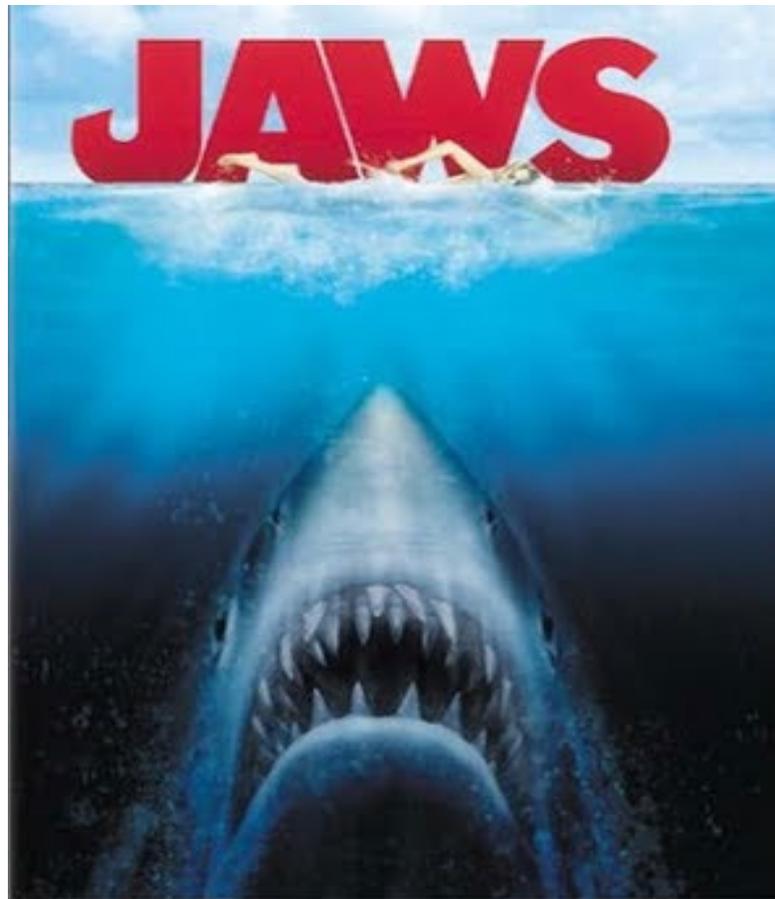
Peers and industry resources

1. “Career ladders provide mobility for staff members who have spent many years working in CDI...”
2. “Career ladders help incentivize existing CDI specialists...”
3. “CDI leaders may implement a career ladder to answer the need for improved infrastructure in CDI...”
4. “...Number of strategic initiatives increases as the program matures...”

- Tamara Hicks, RN, BSN, MHA, CCS, ACM-RN, CCDS-O
ACDIS Member Insight: Building a career ladder in CDI
April 13, 2020

What does a career ladder look like in CDI? We defined our 3 levels

- Acceptance of advancement is voluntary
- No demotions, **however**, coaching sessions and possible disciplinary actions if fall below expectations
- **Level 1** may perform at a basic introductory level or higher having a minimum of 0-2 years of experience in CDI. Must meet quality and productivity standards once entry level training is complete. No CDI credential required.
- **Level 2** performs at a semi-independent expectation level/minimal guidance. Capable of mentoring Level I CDI staff. Assists manager on specific projects as assigned; may attend a collaborative committee; 3-4 years of experience in CDI; Must meet quality and productivity standards. CDI credential required.
- **Level 3** responsible for contributing to strategic management; Capable of focused and second level reviews; Performs independently at the highest level of expectation. Capable of mentoring Level I and II CDI staff. Assists manager on specific projects as assigned. Five years or more experience in CDI; Must meet quality and productivity standards. CDI certification required.



THE SEQUEL:
C-SUITE BUY-IN
WHAT IS THE ROI?

Good question! The ROI is:

- **Retention** of top performers, defined in potential dollars gained and preserved
- **Recruitment** of top talent, we are primarily a remote workforce which lends greater opportunity
- **Energized** incumbent CDI workforce who want to be part of a growing program, own their program and advance in their career
- **Focused** revenue impactful and strategic initiatives



Our impact and results

Level 3s are our future leaders

- Internal leadership council: Level 3 and management
- Develop/refine policies/procedures
- Specialized strategic projects incorporated into workflow (think: sepsis, malnutrition, pneumonia, etc.)
- Pilot programs/initiatives and provide useful feedback for implementation rollout to entire team
- Create focused reports and share with team
- Take at least one leadership class per year
- Support of changes in workflow and processes
- Start to see and understand the whole picture
- Start to own the program and its impact

Hands across the aisles

- Connected with coding
- Connected with quality
- Connected with providers and departments
- Connected with the denials team
- Connected with population health
- Connected with individual facility leaders



Increased infrastructure bandwidth

- Ability to expand beyond leadership constraints
- Ability to expand scope of practice
- Ability to support other departments (think: quality, coding, denials, providers, case management/utilization review)
- Ability to stay industry relevant
- Ability to respond to specific areas of concern
- Ability to support the desire for professional growth opportunities in CDI

Staff satisfaction, retention, and recruitment

- Promoted four staff to level 3 at the start of 2021
- Hired three experienced staff members(one level 3 qualified) in 2021
 - Able to hit the ground running with minimal training downtime
- As of this date, seven staff are planning to acquire their CDI credential in anticipation of promoting in January 2022
- Prevented use of outside contractors
- What interested you in applying for this position: “The opportunity for professional growth.”
- Quarterly staff survey:
 - “Do you feel valued and that your ideas are seriously considered?”
 - 100% of respondents said: “**Yes**”

Questions?

- **Visit** Council community site: <https://acdis.org/acdis-leadership-council>
- **Contact** membership manager Linnea Archibald at larchibald@acdis.org

Following the live meeting, on-demand materials, including the recording and slide deck, will be published to the “[Council Meetings](#)” area of ACDIS site. Members will be alerted by email once materials are available.

Members who were unable to attend the live meeting will still be eligible for the CEU provided they watch the recording by Sunday, October 24.

CEUs will be sent out to both live and on-demand attendees on Monday, October 25.