Creating and Retaining the BEST CDI Team

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Learning Objectives

• At the completion of this educational activity, the learner will be able to:
  – Identify several strategies for selecting the best CDI staff
  – Describe keys for a successful orientation of CDI staff
  – Develop ways to create the “A” team
  – Define ways to keep CDI rock stars rocking
  – Describe ways to deal with the squeaky wheels in the department
  – Discuss ways to take care of yourself as a leader to avoid burnout
6 Keys to Creating and Retaining the Best CDI Team

- Hiring Right
- Successful Orientation
- Advance Leadership Skills
- Engage the Team
- Develop Top Talent
- Deal With the Difficult
Discussion/“Raise Your Hand” Question

How do you feel about the below statement?
Agree or disagree?

“Hire for attitude, train for skill”

(Southwest Airlines motto)
Selecting the Best Candidates for Your CDI Team

• When looking at applicants, first determine: What is important to you and your CDI team?
  – CDI experience
  – Clinical experience
  – Coding experience
  – Technical or computer savvy
  – Specialty expertise
  – Physician teaching experience
  – Educational background
  – Quick learner
  – Team player, friendly
  – Other

Assess your high performers and low performers; you will likely see some behavioral patterns. Use these observations to help define what you want in a future team member.
Selecting the Best Candidates for Your CDI Team

- Don’t settle for a warm body—be picky
- Be honest about the job during the interview process
- Ask behavior/scenario type questions during the interview
- Discuss job expectations—hours, routine, metric goals, overtime
- Utilize your team and arrange a group interview
- If possible, schedule a job shadow so the potential hire can really see what the job entails

“I am convinced that although training and development are important, recruitment and selection are much more important.”
Stephen R. Covey, author of The 7 Habits of Highly Effective People
## Whom Would You Hire?

<table>
<thead>
<tr>
<th>Applicant A</th>
<th>Applicant B</th>
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</thead>
<tbody>
<tr>
<td>Sally comes to you with extensive CDI experience; she has worked at multiple different hospitals around your city doing CDI work and is very knowledgeable. However, during the interview she is demanding regarding her schedule, wants to make sure she makes premium pay, and wants to be out every Friday by 2:00. She also tells you, “I’m not really into any of that team stuff—just give me work and leave me alone.”</td>
<td>Jane has extensive clinical nursing experience; she has worked in the ICU/CCU for the past 15 years. She has done some research about DRGs and has a basic understanding of the job. She asks a lot of questions and shows interest in the department. She asks what her schedule would look like, but stresses that she’s willing to do whatever she needs to do since she would be new to the team.</td>
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</tbody>
</table>
Orientation

• Set expectation early
• Create a complete orientation checklist with achievement goals
• Meet regularly and discuss if progressing towards plan
• Revise orientation plan if needed
• Assign mentors or a go-to person
• Understand individual learning style
• Ongoing check-ins for first 6 to 8 months

Set clear expectations from the start.
## Orientation Checklist Example

<table>
<thead>
<tr>
<th>Week 1</th>
<th>Tasks</th>
<th>Explanation date</th>
<th>Demonstration date</th>
<th>Orientee initials/date</th>
<th>Preceptor initials/date</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Initial paperwork/onboarding</td>
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<td></td>
<td>Read CDI orientation manual</td>
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<td>Facility orientation</td>
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<td>Online education assignments—how to access</td>
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<td></td>
<td>List all applications needed for chart review and CDI job</td>
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<td>Introduction to the facility’s medical record</td>
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<td>Shadowing of CDI preceptor</td>
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<td>Introduction of CDI software and record review</td>
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<td></td>
<td>Read facility's CDI policies</td>
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<td></td>
<td>Record review overview</td>
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<td></td>
<td>Information abstraction from record</td>
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<td></td>
<td>Code/DRG selection</td>
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<td></td>
<td>Clarification generation/content and formatting</td>
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<td></td>
<td>Introduction to HIM/coding staff</td>
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<td></td>
<td>Review query templates</td>
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<td></td>
<td>Concurrent vs. retro queries</td>
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<td></td>
<td>Access to email client</td>
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<td>Shared drive tracking and information (if applicable)</td>
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<td>Access to shared folder (if applicable)</td>
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<td>Verify all sign-ons working</td>
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<thead>
<tr>
<th>Week 2</th>
<th>Tasks</th>
<th>Explanation date</th>
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<th>Orientee initials/date</th>
<th>Preceptor initials/date</th>
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<tbody>
<tr>
<td></td>
<td>Shadow preceptor</td>
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<td></td>
<td>Read facility's CDI policies</td>
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<td></td>
<td>Record review overview</td>
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<td>Information abstraction from record</td>
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<td>Code/DRG selection</td>
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<td>Clarification generation/content and formatting</td>
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<td>Introduction to HIM/coding staff</td>
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<td>Review query templates</td>
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<td>Concurrent vs. retro queries</td>
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<tr>
<th>Week 3</th>
<th>Tasks</th>
<th>Explanation date</th>
<th>Demonstration date</th>
<th>Orientee initials/date</th>
<th>Preceptor initials/date</th>
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<tbody>
<tr>
<td></td>
<td>Attend CDI boot camp if applicable</td>
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<td>Leadership to provide orientation if the above is not available</td>
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<td>Week 4</td>
<td>Tasks</td>
<td>Explanation date</td>
<td>Demonstration date</td>
<td>Orientee initials/date</td>
<td>Preceptor initials/date</td>
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<td></td>
<td>Start to review 2–5 patients and follow-up reviews as indicated</td>
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<td></td>
<td>Follow-up discussion with preceptor reviewing cases and providing feedback</td>
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<td></td>
<td>Preceptor reviews and validates all worksheets prior to record placement for completeness, accuracy, and compliance</td>
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<td></td>
<td>Review facility-specific process flow map (if applicable)</td>
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<td>Review facility-specific provider escalation policy (if applicable)</td>
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<td></td>
<td>Discuss metrics importance and goals: query response rate 95%, MD agreement rate 85%, Medicare review rates 95%–100%</td>
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<td>Week 5</td>
<td>Review up to 5–8 new cases per day and follow-up reviews as indicated</td>
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<td></td>
<td>Follow-up discussion with preceptor reviewing cases and providing feedback</td>
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<td></td>
<td>Review query library</td>
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<td>Review Coding Clinic</td>
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<td>Week 6</td>
<td>Review up to 8–10 new cases per day and follow-up reviews as indicated</td>
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<td></td>
<td>Follow-up discussion with preceptor reviewing cases and providing feedback</td>
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<td></td>
<td>Preceptor validates worksheets and clarifications</td>
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<td></td>
<td>All assigned online education classes complete</td>
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<td>Week 7/8</td>
<td>Meet with management and preceptor to evaluate further orientation needs</td>
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<td>Review 10–12 cases</td>
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<td>Focus on organization techniques</td>
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<td>Week 9/10/11</td>
<td>Work independently reviewing 10–12 cases with follow-ups, asking preceptor or experienced staff as needed</td>
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<td>Week 12</td>
<td>Review personal metrics/productivity and discuss with preceptor and management</td>
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<td></td>
<td>Management to do 90-day employee review</td>
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</table>
Developing Your “A” Team

• Clear, consistent, and regular communication—training sessions, newsletters, regular meetings, etc.
• Create and define common goals
• Huddles/team meetings to discuss cases, process, and ways to improve
• Explain the why; gain buy-in for new processes or changes
• Celebrate accomplishments; practice random acts of kindness
• Understand your team—what motivates them, how they like to be rewarded, etc.

“Coming together is a beginning. Keeping together is progress. Working together is success.”
Henry Ford
Developing Your “A” Team

• Create a professional atmosphere—not just a job
• Treat others fairly and respectfully; create trust
• Open up silos—inInvite physicians, coders, case managers, etc. to create an even bigger team
• Give staff reasons to be proud of the job they do
• Look for ways to make work fun—potlucks, challenges, gift exchanges
• Be creative with remote staff—they also need that team environment

CDI specialists and coders do not work alone. They form a team with each other and throughout the organization.
10 Qualities of a Great Team

- Trusts one another
- Embraces different ideas and opinions
- Not afraid to question
- Cooperates
- No procrastinators

- Committed
- Respects one another
- Supports one another
- Shares openly and willingly
- Knows other team members beyond a professional level

Discussion/“Raise Your Hand” Question:
How Do You Treat Your Top Talent Employees?

A. I do nothing different; I treat all my employees the same
B. I reward them with better pay, hours, assignments, etc.
C. I reward them by giving them more work
D. I prep them for a possible promotion in the future
E. Other
Identifying Your Rock Stars

- Rock stars have the following attributes:
  - Display a great attitude
  - Work above well-established norms
  - Are valuable assets; would be difficult to replace
  - Raise other people’s spirits
  - Live up to their words
  - Demonstrate emotional intelligence (self-aware, self-regulated, internal motivation, empathy, and social skills)
  - Take initiative
  - Cultivate synergy among the team
Keeping Your Rock Stars Rocking

- Develop rewards and incentives
- Enforce clear, consistent expectations
- Hold people accountable
- Offer professional development, extra education, attend sessions, gain CCDS credential
- Accommodate their schedule—ideas: flexibility, work from home option
- Develop a career ladder—advancements
- Develop relationships—have one-on-one meetings to make sure they are doing OK

Develop Top Talent

Be careful not to reward your rock stars with more work!
Dealing With the Squeaky Wheel(s)

Do you recognize these people?

<table>
<thead>
<tr>
<th>The Know-It-Alls</th>
<th>The Passives</th>
<th>The Dictators</th>
<th>The “Yes” People</th>
<th>The “No” People</th>
<th>The Gripers</th>
</tr>
</thead>
<tbody>
<tr>
<td>They’re arrogant and usually have an opinion on every issue. When they’re wrong, they get defensive.</td>
<td>They never offer ideas or let you know where they stand.</td>
<td>They bully and intimidate. They’re constantly demanding and brutally critical.</td>
<td>They agree to any commitment, yet rarely deliver. You can’t trust them to follow through.</td>
<td>They are quick to point out why something won’t work. What’s worse, they’re inflexible.</td>
<td>Nothing is ever right with them. They prefer complaining to finding solutions.</td>
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</tbody>
</table>
**Should the Squeaky Wheel Get the Oil or Get Replaced?**

<table>
<thead>
<tr>
<th>Scenario A</th>
<th>Scenario B</th>
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</thead>
<tbody>
<tr>
<td>Sue is a complainer. She comes to you at least once a day with some issue that she sees or hears. She annoys her coworkers because she tells them when they don’t do something right. However, she is your highest producer, her audits come back with few opportunities for improvement, and she understands coding rules better than anyone else on your team.</td>
<td>Sally is one of the nicest people you know and has a really hard personal life. She has been with the department for two years but still barely meets productivity standards. You continue to support her, educate her, and assist her any way you can, but she simply seems unable to grasp the concepts of CDI. Her latest audit showed an opportunity in each of the charts that were reviewed.</td>
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Dealing With the Squeaky Wheel(s)

- Most people have good intent—understand their intent
- Understand ways and strategies to deal with difficult personalities
- Decrease advisory relationships
- Try not to focus on the squeaky wheel—reward good behavior
- Attempt to mentor and manage a low performer up to the level you want the person to be at
- Unfortunately, sometimes a person and a job are not the right fit for each other

“The squeaky wheel doesn’t always get greased; it often gets replaced.”
John Peers
Crucial Conversations

• Three options when having a difficult conversation with challenging employees:
  1. Avoid them
  2. Face them and handle them poorly
  3. Face them and handle them well

“Be brave enough to start a conversation that matters.”
Margaret Wheatley
# Crucial Conversations: Move to Action

## Decide How to Decide

- **Command**: Decisions are made without involving others
- **Consult**: Input is gathered from the group and then a subset decides
- **Vote**: An agreed-upon percentage swings the decision
- **Consensus**: Everyone comes to an agreement and then supports the final decision

## Finish Clearly

- **Determine WHO does WHAT by WHEN**
- **Make deliverable crystal-clear**
- **Set a follow-up time**
- **Read the commitments and then follow up**
- **Finally, hold people accountable to their promises**
Discussion/“Raise Your Hand” Question

How do you feel about the quote below?
Agree or disagree?

“People leave managers, not companies”
Avoiding Leadership Burnout

- Take care of YOU
- Manage your hours
- Learn to delegate
- Get organized
- Find a relaxing hobby
- Continue to work on your leadership skills
- Learn ways to be proactive, instead of reactive

“The road to success is always under construction.”
Lily Tomlin

Advance Leadership Skills
Advance Your Leadership Skills

• Network with other leaders and listen for tips, tricks, and efficiencies others have found helpful
• Find a mentor and meet with him or her often
• READ, READ, READ
• Attend conferences and listen to webinars that advance your leadership skills
• Ask someone to provide feedback on areas where you need to improve
• Find ways to develop your weaker areas

“If your actions inspire others to dream more, learn more, do more, and become more, you are a leader.”

John Quincy Adams
Summary

You Can DO IT!

The Best Team

- Hiring Right
- Successful Orientation
- Engage the Team
- Develop Top Talent
- Deal With the Difficult
- Advance Leadership Skills
References


• Covey, S. (2013). *The 7 habits of highly effective people.* Simon & Schuster.


Thank you. Questions?

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