


MAY 23-26, 2016
Georgia World Congress Center
ATLANTA



**Where Do I Go From Here?
Establishing Career Paths for CDI**

acdis
9TH ANNUAL CONFERENCE

Michelle McCormack, RN, BSN, CCDS, CRCR
CDI Director
Frances Frank, RN, MBA/MSN/HCM, CPHQ
CDI Manager
Stanford HealthCare, Palo Alto, CA


Learning Objectives HCPPro

- At the completion of this educational activity, the learner will be able to:
 - Discuss the benefits of a career ladder for a CDI organization
 - Differentiate between three differing ladder models
 - Integrate a career ladder into an existing CDI team

Disclaimer
This presentation is intended for educational purposes only and does not replace independent professional judgment. The statements and opinions expressed are those of the speakers and, unless expressly stated to the contrary, do not represent the views or opinions of Stanford Health Care. Stanford Health Care does not endorse or assume responsibility for the content, accuracy or completeness of the information presented.

Steps for Attendees to View/Answer POLLING QUESTIONS

- Navigate to the event **Agenda** in the main menu
- Tap the **name of the current session** to view the session details page
- Tap **Polls**
- Tap the **name of the poll**
- Tap your **answer choice** and then tap **Submit**




Polling Question 1

- Do you have a career ladder or other means to provide promotions or growth opportunities for CDI specialists in your facility?
 - Yes
 - No, but we plan to implement one
 - No
 - Don't know
 - Not applicable

HPro

Benefits of CDI Career Paths



5

HPro

Benefits of CDI Career Paths

- Staff engagement
- Professional growth
- Building, maintaining, sustaining provider relationships
 - Subject matter experts
- Broadened depth of roles
 - High functioning team
 - Increased outreach and impact
- Retention

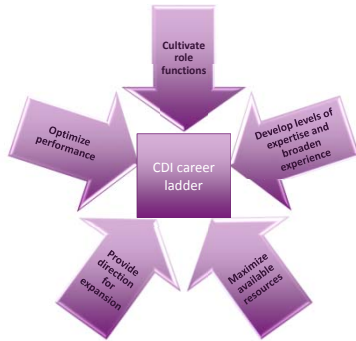
6

Polling Question 2

- What are the most vital reasons for considering career ladder creation at your organization?
 - A. Creating more structure for different skill sets
 - B. CDI career growth
 - C. Retention within the organization's CDI program/department
 - D. A and B
 - E. A, B, and C

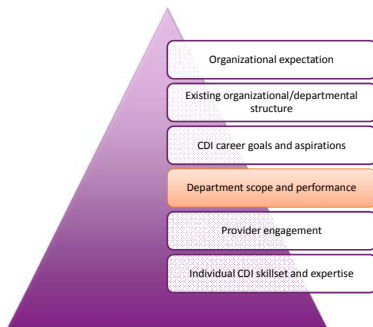
Strategies for Career Ladders

HCPRO



Current State: Factors Influencing Selection of Career Ladder

HCPRO



**Department Scope:
Influencing Selection of Career Ladder** HCPPro

10

Establishing Ladder Position Criteria HCPPro

Establish criteria for each level by

- Length of experience
- Level of CDI skillset and expertise
 - Including certification(s)
- Contributions to department
 - Above minimum expectations
- Contributions to provider/department education
 - Content development
 - Speaking/presentation skills

11

Career Ladder Navigation HCPPro

Options for existing employees:

- Utilization of annual performance evaluations for timed promotional opportunities
- Application process
 - Consider including reference requirements
- Nomination process

Considerations for new employees:

- Standardized starting level
 - Post-probation period navigation
- Initial career ladder level determined by professional qualifications and experience

12

Polling Question 3

- If you plan to implement a career ladder, what is your intended format?
 - Each level of the ladder will be a new position with very different responsibilities
 - Each level will be an extension of the level before with added responsibilities

CDI Career Ladder Structures

- Single job description with level hierarchy
- Multiple job descriptions and specialized roles
- Hybrid—level hierarchy and specialized roles



CDI Career Ladder With Single Job Description and Level Hierarchy



Creating Career Ladder With Single Job Description and Level Hierarchy HCPPro

- Single job description and pay scale
 - All levels described within a single job description
 - Level hierarchy is established within
- Career ladder navigation allows for advancement opportunities
 - Collaborate with human resource department
- Single ranged pay scale
 - Low, median, and high
 - Collaborate with compensation department

16

Pros and Cons: Single Job Description and Level Hierarchy HCPPro

- Potential pros
 - May be easier to implement within existing structure
 - Easier mobility from one level to another
 - Can still be used to create service line/unit teams
- Potential cons
 - Perceived as less “promotional”
 - Less formal job role definition

17

Example: Single Job Title HCPPro

```

graph TD
    L1["CDI Specialist 1  
Entry level  
All CDI Specialists enter at this level regardless of experience"]
    L2["CDI Specialist 2  
Intermediate level I  
CDI Specialists navigate to this level after a probationary period and successfully performing all functions in the entry-level role for an established period of time"]
    L3["CDI Specialist 3  
Intermediate level II  
CDI Specialists navigate to this level after performing all functions in the intermediate level I role for an established period of time, obtaining role-related certification, and contributing to provider education in a defined manner"]
    L4["CDI Specialist 4  
Advanced level  
CDI Specialists navigate to this level after performing all functions in the intermediate level II role for an established period of time, obtaining additional certification/course completion, and successfully leading a project or education initiative, with positive reference from providers and peers"]
    
    L1 --> L2
    L2 --> L3
    L3 --> L4
  
```

18

Single Job Description Career Ladder
Example: Role Responsibilities and Expectations

HCPRO

- **CDI Specialist 1**
 - Entry level
 - Largely case review and query focus
 - Provider interactions primarily through query process
 - Maintaining established provider relationships
- **CDI Specialist 2**
 - Intermediate level I
 - Responsibilities (in addition to entry level):
 - Slightly reduced productivity expectation
 - Provider engagement, relationship establishment and maintenance with providers
 - Provider interactions and participation through formal and informal education contributions
 - CDI data trend analysis, issue identification, and solution proposal
 - Contribute to ongoing documentation improvement initiatives

19

Single Job Description Career Ladder
Example: Role Responsibilities and Expectations

HCPRO

- **CDI Specialist 3**
 - Intermediate level II
 - Responsibilities (in addition to intermediate level I):
 - Slightly reduced productivity expectation
 - Lead the provider engagement, relationship establishment and maintenance with providers
 - Major contributor of provider education and planning/delivery
 - Lead and manage formal and informal provider education
 - Department project involvement, as identified by leadership
 - Lead and manage ongoing documentation improvement initiatives
- **CDI Specialist 4**
 - Advanced level
 - Responsibilities (intermediate level II tasks only as determined by leadership)
 - Peer quality review
 - New employee orientation
 - Facilitators of departmental education
 - Establish and guide provider education plans
 - Department project involvement/lead, as identified by leadership

20

CDI Career Ladder With Multiple Job Description and Specialized Roles

HCPRO



21

Polling Question 4

- What new roles and responsibilities resonate with your CDI program/department?
 - Traditional clinical documentation improvement specialist
 - Quality CDI
 - CDI educator/trainer
 - Two of the above
 - All the above

Creating a Career Ladder With Multiple Job Description and Specialized Roles HCPRO

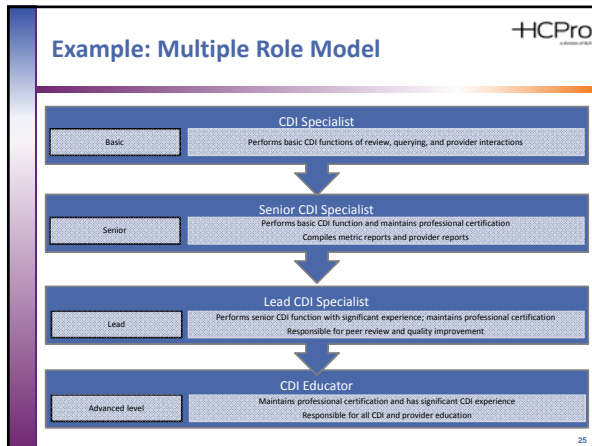
- Multiple job descriptions and specific role responsibilities
- Advancement provided through promotion to new job role
 - Collaborate with human resource department
- Separate pay scale for each job role
 - Collaborate with compensation department

23

Pros and Cons: Multiple Job Description and Specialized Roles HCPRO

- Potential pros
 - Will create focused areas of expertise
 - Increased “promotional” opportunity to new job title
 - Employee perception
- Potential cons
 - May become “siloed” in tasks
 - May be more challenging to implement within existing structure
 - Organization-provided training vs. individual-sought training for mobility from one level to another

24




- ### Multiple Role Model
- #### Example: Role Responsibilities and Expectations
- **CDI Specialist**
 - Largely case review and query focus
 - Provider interactions primarily through query and response
 - Maintaining established relationships with all providers in assigned service lines/units
 - **Senior CDI Specialist**
 - Role-related certification
 - Responsible for case review and queries
 - CDI query reports
 - Identification of service line/unit education opportunities
 - Collaborates with CDI Educator
 - Provider interactions and rapport through informal interaction and education
 - Collaborates with CDI Educator
 - Department project involvement, as identified
- 26

- ### Multiple Role Model
- #### Example: Role Responsibilities and Expectations
- **Lead CDI Specialist**
 - Role-related certification
 - CDI team/department reporting
 - Identification of process and performance improvement opportunities
 - Works closely with CDI Educator and leadership
 - Responsible for peer quality reviews and quality improvement initiatives
 - Department project involvement, as identified
 - **CDI Educator**
 - Educator is responsible for all for formal CDI and provider education
 - Includes content development, approval, and delivery
- 27

HCPRO
Healthcare Compensation Professionals

CDI Career Ladder Hybrid or Combined Method



28

HCPRO
Healthcare Compensation Professionals

Hybrid or Combined Method

- Few job descriptions with some specific role responsibilities
- Advancement provided through multiple methods
 - Collaborate with human resource department
 - Level hierarchy is established within one or more job descriptions
 - Promotion to new job role
- More than one pay scale
 - Collaborate with compensation department
 - May also leverage ranged pay scales

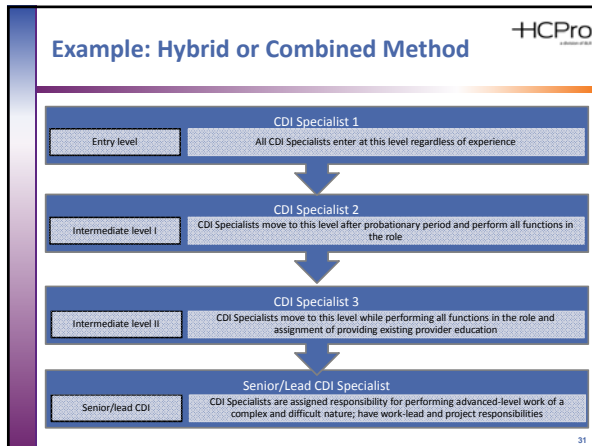
29

HCPRO
Healthcare Compensation Professionals

**Pros and Cons:
Hybrid or Combined Method**

- Potential pros
 - Could yield additional flexibility
 - Can be used to create service line/unit teams
 - Focused approach
 - Still allows for “promotional” opportunity
- Potential cons
 - May be less adaptable for future structure changes
 - Organization-provided training vs. individual-sought training for mobility from one level to another—who provides?

30




- Hybrid or Combined Method**
Example: Role Responsibilities and Expectations HCPPro
- **CDI Specialist 1**
 - Largely case review and query focus
 - Provider interactions primarily only through query and response
 - **CDI Specialist 2**
 - Identified number for each service line/unit or within department
 - Slightly lower productivity expectation
 - Provider engagement, relationship establishment and maintenance with providers
 - Provider interactions and participation through informal education sessions and content development at service line/unit level
 - Report maintenance at service line/unit level
- 32

- Hybrid or Combined Method**
Example: Role Responsibilities and Expectations HCPPro
- **CDI Specialist 3**
 - Identified number for each service line/unit or within department
 - Slightly lower productivity expectation
 - Lead and manage formal and informal provider education at service line/unit level
 - Lead and manage ongoing documentation improvement initiatives
 - Department project involvement, as identified by leadership
 - **Lead, Senior CDI Specialist and/or CDI Educator**
 - Identified number within department
 - Multiple potential areas of focus
 - Provider and CDI department education
 - Peer/quality review
 - Process/performance improvement
 - Project management
 - Department expansion growth analysis
- 33

+HCPRO
Healthcare Consulting Professionals

Identifying Ideal Candidates for Roles



34

Polling Question 5

- What professional backgrounds comprise your CDI department staff?
 - MD
 - RN
 - RHIA
 - A and B (MD and RN)
 - Other

+HCPRO
Healthcare Consulting Professionals

Know Your Current Team

- Understand the strengths on your team
 - High-functioning team vs. working in silos
 - Service line relationship building
 - Identify gaps and opportunities for growth
 - Peer review and individual performance monitoring
 - Identify different areas of professional expertise among staff to leverage talent
 - Assist with building a highly successful team
 - Identify the best fits for different roles within the department

35

+HCPRO
Health Care Professionals Resource

Know Your Current Team

- Understand strengths in individual contributors
 - Know educational and professional backgrounds, credentials, certifications
 - Learn about individual career goals
 - Hold individual discussions
 - Explore trends in individual performance
 - Identify gaps and opportunities for growth
 - Peer review and individual performance monitoring
 - Ensure continued success toward performance metrics through continued evaluation and feedback
- Identify gaps in skillset and expertise!

37

+HCPRO
Health Care Professionals Resource

Evaluation of Staff

- Identify which criteria will be used to evaluate justification for promotion
 - Allow staff to provide input
- Have concurrent and ongoing evaluation in addition to the traditional annual performance evaluation
 - Establish time frames for staff to follow through on recommendations
- Take this opportunity to establish ongoing peer review process of current staff to ensure compliance and advancement in growth of all team members

38

+HCPRO
Health Care Professionals Resource

Evaluation of Staff

- Evaluate current performance against organizational metrics and expectations
 - Individual performance on metrics given to staff at regular intervals (i.e. weekly, biweekly, monthly)
- CDI work quality review and assessment
 - Concurrent case review and query quality audit
 - Benefit: Real-time impact on cases
 - Benefit: Real-time knowledge of quality performance and ability to create ongoing process for future promotional opportunity
 - Benefit: Ability to identify opportunities for individual growth

39

HPro
HEALTHCARE PROFESSIONALS

Evaluation of Staff

- Include evaluation of provider interaction
 - Verbal interaction vs. electronic correspondence
 - Provider response
 - Response turnaround time
 - Follow up with provider if escalation is necessary
 - Provider feedback
 - Benefit: Will identify customer perspective on the relationship with current staff and identify areas for opportunity

40

HPro
HEALTHCARE PROFESSIONALS

Example of CDI Quality Audit/Peer Review

- CDI coding knowledge assessment
- Query opportunity identification assessment
- Query compliance assessment
- CDI skills and process assessment
- Provider interaction assessment

41

HPro
HEALTHCARE PROFESSIONALS

Example of CDI Quality Audit/Peer Review

CDI coding knowledge assessment	
Principal diagnosis correctly identified?	
Principal procedure correctly identified?	
Documented CC correctly identified?	
Documented MCD correctly identified?	
Additional documented 2nd diagnosis correctly identified?	
ICD status correctly identified?	
DRG correctly identified?	
Query opportunity identification assessment	
Query opportunities found?	
Potential query opportunity missed?	
Query compliance assessment	
Dated with CDS name & contact info?	
Addressed to correct and specific provider/group?	
Identified correct diagnosis?	
Identified treatment/interventions?	
Provided appropriate options?	
Contains concise, non-leading verbiage?	
↳ tone, response, and helpful?	
↳ query appropriate (not unnecessary)?	
Was verbal query language compliant?	
CDI skills and process assessment	
Performed thorough chart review?	
Focused on relevant information?	
Initial review completed/review in timely manner?	
Performed appropriate and timely subsequent review?	
Collected relevant CDI data?	
Entered necessary & accurate data?	
↳ not review data entered?	
↳ correct query impact assigned?	
↳ appropriate query type, response, and response date entered?	
Provider interaction assessment	
Initiated verbal interaction?	
Responded appropriately to questions?	
Performed timely/appropriate follow up?	
Compliance rate of queries identified/reviewed?	
Provider turnaround time within goal?	


42

Example of CDI Quality Audit/Peer Review Summary Tool HCPPro

CDI overall assessment	Weight	CDI score	Proficient performance	Advanced performance
CDI coding knowledge assessment	15		80	90
Query opportunity identification assessment	25		85	90
Query compliance assessment	25		95	95
CDI skill and process assessment	15		90	95
Provider interaction assessment	20		90	95
Total	100		88	93

43

Integration of Career Ladder Into Existing Team HCPPro



44

- Career Ladder: Integration Into Existing Structure** HCPPro
- Determine what will work best:
 - One job description
 - Level 1: Entry; Level 2: Intermediate 1; Level 3: Intermediate 2; Level 4: Advanced
 - Multiple job descriptions
 - CDI Specialist, CDI Educator, CDI Quality
 - Hybrid, two job descriptions
 - CDI Specialists at Level 1, Level 2, and Level 3
 - CDI Quality Specialists
- 45

HCPRO
Health Care Professionals

Messaging to Staff

- Talking points
 - Balancing organizational and operational needs
 - Role development—organizational support
 - Role mobility—moving from one role to another
 - Leverage strengths of individuals to support career ladder mobility
- Share process for how to move from one position or level to another
 - Application process
 - Approval process

46

HCPRO
Health Care Professionals

Building and Maintaining Positive Team Dynamics Throughout the Selection Process and Transition

- Transparency and communication is vital!
- Be consistent with evaluation and application of selection criteria
- Ensure understanding that each level of the ladder consists of a role vital for the department
 - Leverage the different areas of professional expertise to build a highly successful team

47

HCPRO
Health Care Professionals

Building and Maintaining Positive Team Dynamics Throughout the Selection Process and Transition

- Framing positive conversations with those not selected for current promotion
 - Identify specific development plans and follow through!
 - Identify areas for professional growth within current position
 - Moving someone in an entry-level role to an intermediate role
 - Moving someone in an intermediate role to an advanced role
 - Identify areas of professional growth through education and application of new skills

48

Building and Maintaining Positive Team Dynamics Throughout the Selection Process and Transition HCPPro

- Encourage staff to use the ladder structure to identify career goals and learn about those new goals
 - Provide honest feedback and mentoring to assist with meeting these goals
- Honestly and consistently recognize progress and growth
 - Create or leverage existing internal opportunities for recognition
 - Document the progress and growth

49

High Points HCPPro


- Many benefits to establishing career paths for your CDI department
- Role identification and promotional opportunities within your department
- Provides career paths for CDI experts
 - Encouraging and supporting all staff in professional growth
- Maintaining positive team dynamics throughout the selection process and transition

50

Thank you. Questions? HCPPro

mmccormack@stanfordhealthcare.org
ffrank@stanfordhealthcare.org

In order to receive your continuing education certificate(s) for this program, you must complete the online evaluation. The link can be found in the continuing education section at the front of the program guide.



51
