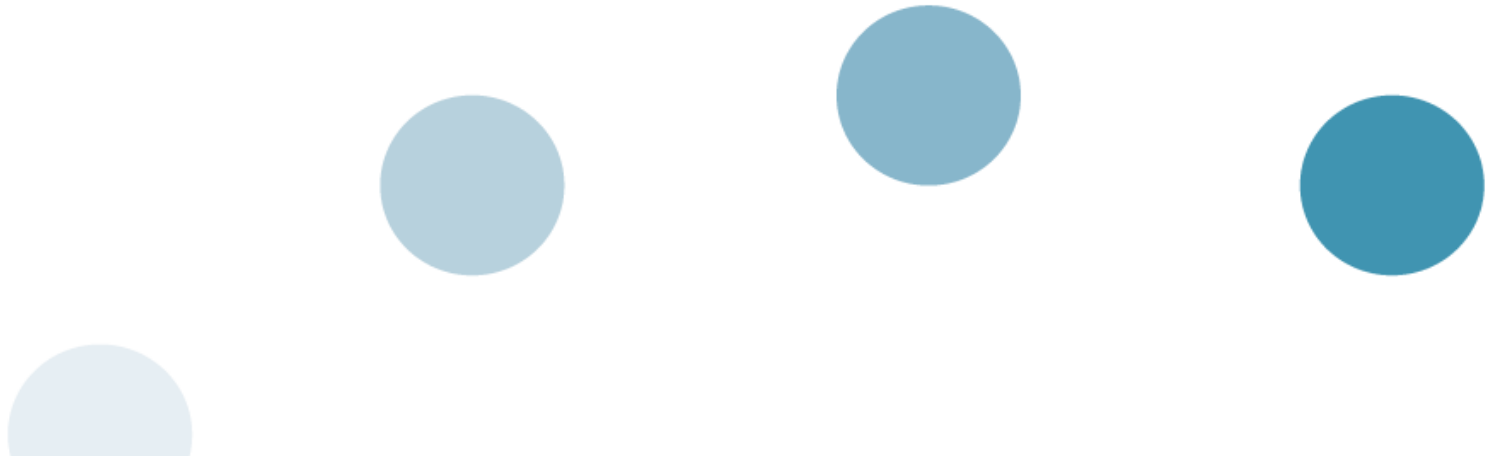




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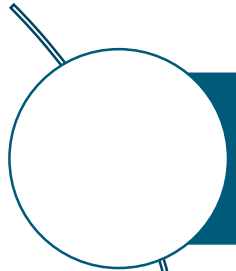
UASI Lunch and Learn: CDI Management Series Successful C-Suite Presentations

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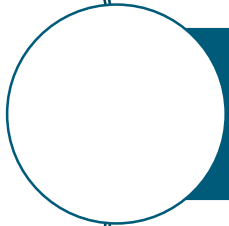




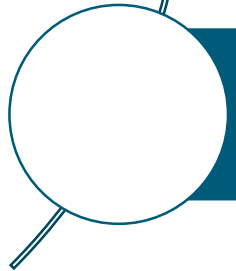
Desired Outcomes



Schedule and make the most of regular meetings with your C-Suite or other leaders



Recognize the do's and don'ts of C-Suite presentations



Apply lessons learned from common scenarios: first time C-suite meeting, routine C-Suite meetings, requesting more CDI staff, requesting a new position (e.g. a second level reviewer), and seeking support to address a low physician response rate

The Importance of Ongoing Meetings with Hospital Leadership/C Suite



Understanding

Assuring your Organizational Leader understands the necessity of the CDI Program

Informed

Keeping the executive leadership informed of the value the CDI program brings to the organization

Support

Ensures your CDI program obtains the attention and support it needs within the organization

The CDI staff are counting on their direct leaders to ensure organizational leaders know and understand the importance of their day to day CDI work

The Value of Clinical Documentation Improvement Programs

**Accurate
Reimbursement**

Decrease Denials

**Appropriate
Documentation for
Value Based Care**

**Assist in
Quality Measure
Reporting**

**Improved
Communication of
Patient Plan of
Care**

**Proper Capture of
HAC's/PSI**

**Correct
SOI/ROM**

Preparation: The Basics



Prior to your meeting, know the answers to these questions:

Who?

- Find out who will be attending the meeting and their titles or roles within the organization.
- If you request the meeting, determine who should attend the meeting (titles and roles)

What?

- When you're invited to a meeting, ask prior what is the desired outcome of the meeting
- If you request the meeting, determine what is the goal for the meeting.

Where/When?

- At least a day prior or before , look at when and where the meeting is located or if it will be held remotely, confirm you have a call-in number.

Why?

- Make sure you know specifically why you are presenting or attending at this meeting

How?

- Consider how you will present the information. Do you need to print materials? What will best aid the discussion, do you need to prepare a take-away? (Power Point vs handout)

Successful C-Suite Presentations Preparation

Tips

- Show up early
- Stick to allotted time
- Share what's going well
- Be honest on opportunities for improvement
- Be confident
- Expect tough questions and be prepared to answer
- Prepare possible solutions
- Anticipate what data/metrics will be needed to make a decision
- Understand the data and materials
- Always conclude with “Is there other information or data you would like to see?”



Successful C-Suite Presentations Preparation

Avoid

- Provide too many details
- Prepare too many slides
- Answer questions you don't know the answers to
 - it's ok to say, I don't know, but I will get back to you on that (be sure to get back to them)
- Get defensive
- Neglect to double and triple check your metrics
 - make sure they add up and you know where the data comes from
- Beat around the bush or hinting on what you need
- Show your bias, exaggerate, or over-state facts
- Make promises you can't keep



Potential CDI Scenarios for Preparing Successful C-Suite Presentation

- First time meeting with C-Suite
- Routine monthly meetings with C-Suite
- Need: Increase CDI coverage/review Rate
- Need: Add a second level reviewer
- Challenge: Low physician response to queries

**“Success occurs
when
opportunity
meets
preparation.”**
Zig Ziglar

Scenario: First Time Meeting with Leaders

Prep:

- Know the answers to: who, what, where, when, why and how
- First time meetings could mean you are new, your leader is new or you haven't had meetings set up before

Opening:

- Plan to start by introducing yourself, give an overview of your bio and share contact information, also perhaps ask for them to share a little about themselves

Common Goals of Initial Meeting:

- Developing trust, discussing current state and goals of the CDI program and determining ongoing meeting frequency

Metrics/reports include:

- Number of CDI Staff and Number of CDI open positions
- Baseline CDI Metrics: Coverage Rate, Query Rate, Response Rate and Financial Impact

Wrap up:

- Review any follow ups needed
- Ask what information to prepare for next meeting

Scenario: Routine Meetings with Leaders

Prep:

- Know the answers to: who, what, where, when, why and how
- Use your routine meetings with the C-Suite to showcase your department, keep them informed and gain support to assist in overcoming challenges

Opening:

- Plan to start meeting with any follow ups from last meeting

Common Goals for Routine Meetings:

- Showcase return on investment (ROI) of CDI Program, gain support for ongoing or upcoming initiatives

Possible metrics/reports to include:

- CMI, Coverage Rate, Query Rate, Physician Response Rate and Financial Impact

Wrap up:

- Review any follow ups needed
- Ask what information they would like included

Scenario: A Need for Increased CDI Coverage

Prep:

- Know the answers to: who, what, where, when, why and how

Desired outcome:

- Increase CDI Staff by at least 2 FTE's

Prepare metrics to tell the story on the rationale for expanding CDI Staff

Possible metrics/reports to include:

- Current CDI coverage rate of Medicare and other payers
- Future CDI coverage rate goals
- CDI financial impact

Scenario: A Need for Increased CDI Coverage Metrics

Month	Number of Medicare Discharges	Number of Other Payer Discharges	Number of CDI FTE's	Number of Medicare patients Reviewed	Number of Other Payers Patients Reviewed	Average Coverage Rate for Medicare	Average Coverage Rate for Other Payers	Average Query Rate	Financial Impact on Medicare Patients	Financial impact on Other Payer Patients
June	1750	499	6	1100	100	63%	20%	30%	\$ 220,000	\$ 20,000
July	1751	500	6	1101	99	63%	20%	29%	\$ 220,200	\$ 19,800
August	1749	501	6	1099	101	63%	20%	31%	\$ 219,800	\$ 20,200
Average									\$ 220,000	\$ 20,000
Potential increase if increase FTE to 8	1750	500	8	1500	100	86%	20%	31%	\$ 300,000	\$ 20,000

Potential Financial Impact for additional 2 FTE's:
\$80,000/per month

Be sure to understand the metrics presented. Ask these questions before presenting:

- ✓ Where does the data come from?
- ✓ How is the data calculated?
- ✓ What assumptions are being made for the potential increase?

Scenario: A Need for Increased CDI Coverage Planning tool

Successful C-Suite Presentation Planning	
Who:	CFO Sally and Revenue Cycle Vice President Bob
What:	Add 2 FTE's to current CDI Team
Where/When:	C-Suite 301, Tuesday, Sept. 1, 2020 at 8:30am
Why:	CDI coverage rate for Medicare is 63% and barely getting to other payers
How:	Create power point and share metrics

Possible Agenda Ideas	
Topics	Notes
Opening:	
Introductions if needed	Introduce self, ask for introductions if don't know everyone in the room
Follow Ups from last meeting	Last meeting was asked to bring metrics to show rationale for requesting 2 additional FTE's
State Overall Goal of Meeting	Discuss and share information on the rationale for requesting 2 additional FTE's
Possible Agenda Topics:	
Share what is going well	Show current coverage, productivity metrics, and financial impact
Share barriers inhibiting ROI success	With current number of CDI staff, the coverage rate
Cover current CDI State and Goals for Future State	List number of current state and benefits of expanding CDI program
Review CDI Metrics:	
Review CDI Reports - decide what you want to include	Share metrics to tell the CDI value and importance of CDI
	Consider reports such as: CMI, CDI Coverage Rate, Financial Impact, Query Rate,
Wrap Up:	
Thank them for their time, considerations, and questions	
Review follow up's and next steps	
Ask what additional information they need or would like to see	
Discuss next meeting date, place, and time. Ask who should be included	

Scenario: A Need to Add a Second Level Reviewer

Prep:

- Know the answers to: who, what, where, when, why and how

The desired outcome:

- Add a CDI Second Level Reviewer to the CDI Team

Do research on the value of a second level reviewer:

- Check ACDIS website for information
- Reach out to other CDI program leaders and see if they can provide any helpful information or validate your assumptions
- Reach out to your denials team and see how many clinical denials the hospital is receiving
- Do a pilot of a second level review process on targeted cases such as:
 - without CC/MCC outside of GMLOS or with lone CC/MCC
 - Mortality cases with SOI/ROM less than a 4/4 and/or without CC/MCC

Find the metrics to tell the story on the rationale for need for second level reviewer:

- Possible metrics/reports include:
 - CC/MCC Capture Rates
 - Denial Rates
 - Recommend carrying out a pilot for three months to show return on investment

Scenario: A Need to Add a Second Level Reviewer Metrics

1. Use public data for CC/MCC Capture Rates

	ABC Hospital	State of CA Benchmark	State Percentile	National Benchmark
DRG with CC only	23.80%	20.00%	83	21.50%
DRG with MCC only	36.10%	41.50%	39	37.30%
DRG with CC/MCC only	1.00%	2%	39	2.20%
DRG with either CC/MCC	60.90%	63.40%	44	61.10%
DRG with no CC/MCC	39.10%	36.60%	56	38.90%

2. Find hospital denial rates and work with denials management team to understand how many denials are due to clinical denials

	ABC Hospital	State of CA Benchmark	Variance off Benchmark
Hospital Denial Rate	6.9%	5.18%	1.72
Number of Denied IP Medicare Claims	406		
Denied IP Medicare Charges	\$39,988,719		

Scenario: A Need to Add a Second Level Reviewer Pilot Example

The Process:

- Two experienced UASI CDI Consultants reviewed records post CDI and Coding but Pre Bill
- Criteria for reviews: >3 LOS, No CC/MCC and/or SOI/ROM < 3/3

The Findings:

- 1237 total cases reviewed across 4 months
- 248 opportunities found
- Documentation opportunities included: Degree of malnutrition, AMS clarification, a fib specificity, etiology of s/s, obesity, abnormal labs, post op complications, non infectious SIRS, type II MI, pathological fracture, spinal cord compression

The Results:

- Potential increase in revenue: **\$1,201,351**

Scenario: A Problem with Low Physician Response to Queries

Prep:

- Know the answers to: who, what, where, when, why and how

The desired outcome:

- Increase physician engagement and physician response to queries

Find the metrics to tell the story on the importance of physicians responding to queries

Possible metrics/reports include:

- Query rates
- Physician response rate
 - If a particular group of physicians not responding perhaps break down by service line or individual provider
- Potential financial impact on not answering queries

Be prepared to have solutions, examples:

- Escalation policy
- Physician education
- Share metrics with physicians leaders

Scenario: A Problem with Low Physician Response to Queries Metrics

Time Frame	Total Queries Left	Total Queries Answered	Query Financial Impact by CDS	ROI per Query	Queries With No Response	Query Response Rate	Potential Financial Impact (if query answered as intended)
Feb-20	160	133	\$79,083	\$595	27	83%	\$15,816.63
Mar-20	450	322	\$161,022	\$500	128	72%	\$64,007.68
Apr-20	600	498	\$202,180	\$406	102	83%	\$41,410.36

Potential Financial Impact if queries were answered: \$121, 235 in 3 months

Consider breaking down the data by service line and/or provider if possible

Sample Presentation Agenda Prep

Successful C-Suite Presentation Planning

Who:	Names and Titles of those invited
What:	Desired outcome
Where/When:	Location/Date/Time
Why:	Reason for the meeting
How:	How are you doing to present the information

Possible Agenda Ideas









Topics	Notes
Opening:	
Introductions if needed	
Follow Ups from last meeting	
State Overall Goal of Meeting	
Possible Agenda Topics:	
Share what is going well	
Share barriers inhibiting ROI success	
Cover current CDI State and Goals for Future State	
Review CDI Metrics:	
Review CDI Reports - decide what you want to include	
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Wrap Up:	
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Questions?



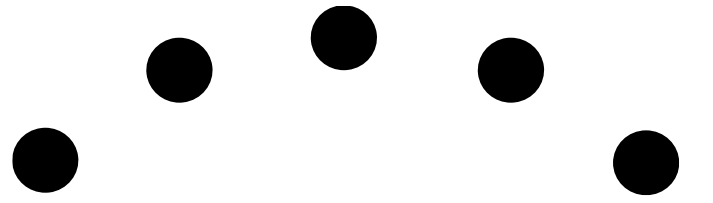
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UASI CDI/UR Services

 CDI Staffing Expert consultants available to meet any staffing need. Onsite, remote, interim management, full outsource; inpatient and outpatient.	 CDI Audits Client focused results delivered with education and recommendations based on CDI best practices, national benchmarking, and official regulatory sources.	 CDI Education and Training Programs tailored to client needs for CDI staff, coders, physician CDI advisors, physicians; basic, advanced or topic-specific.	 CDI Preceptors Experienced CDI Preceptors partner with client's staff for new CDI professionals and ongoing support.
 CDI Consulting Full program evaluation and assessments of current state to advance CDI program and increase ROI; inpatient and outpatient.	 Inpatient Utilization Review Staffing Experienced UR consultants to meet any staffing need; onsite or remote.	 Inpatient Clinical Validation Services Evidence based approach to capture clinical indicators and minimize clinical denials.	 Outpatient HCC Services Customized OP CDI for specific OP venues. UASI experts are leading development of best practices through progressive innovation.

UASI CDI/UR Services Stats

- **4 out of 5 UASI clients request ongoing or return services following an initial CDI engagement**
- **UASI works for top hospitals utilizing our experienced team of consultants to deliver value tailored to our client's specific needs**
- **CONSULTANTS average 8 years in CDI and/or UR and 22 years in clinical nursing**
- **MANAGERS average 11 years in CDI and/or UR and 24 years in clinical nursing**



UASI at a Glance

Headquarters:	Cincinnati, Ohio
Founded:	1986
Clients:	200+ hospitals/health systems nationwide
Team:	450+ employees, including AHIMA/AAPC-certified coders, HIM and clinical documentation specialists
Charts handled annually:	3.75 million coded; 200,000 audited
Solutions:	Coding Services, Coding Reviews, Clinical Documentation Improvement, Revenue Integrity, HIM Solutions, Strategic Consulting

Experience

- Management: 22 years of HIM experience; 11 in CDI
- Coding staff: 8+ years

Quality

- 97% accuracy in coding
- 100% target for accuracy, certification and meeting industry standards

Reliability

- 32+ years in business
- 40 clients in US News & World Report best regional and honor roll hospitals

Culture

- People-centric, team-driven culture
- High employee satisfaction
- 20% new hires referred from current employee
- Industry-leading average employee tenure

Join us for the next UASI Lunch and Learn:
The Power of CDI Metrics
September 23, 2020 at 1:00 EST
email: info@uasisolutions.com for invite

