

Jump Start Your Clinical Documentation Improvement Program with Meta's eCDI Application



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The successful 2007 release of Meta's Electronic Physician Query application generated extensive interest from clinical documentation improvement (CDI) professionals across the country. Numerous facilities have initiated CDI programs in response to regulatory changes that have occurred over the past few years, such as Medicare Severity-DRGs, Present on Admission (POA) requirements and quality reporting. The objective of these programs is to obtain more specific and complete documentation that will better reflect the patient's actual severity of illness and resource consumption. However, many facilities lack the necessary tools to support a comprehensive CDI program, and therefore they find it difficult to achieve their program objectives.

Without a doubt, the CDI process presents the facility with a unique set of challenges. To be effective, it requires a seamless process for assigning case reviews, efficient and reliable communication between the CDI specialist and the attending physician for query processing, appropriate and ongoing education of the physician staff, and access to tools specifically designed to manage and monitor the entire CDI process.

This article begins with a look at the challenges faced by many healthcare facilities with their CDI initiatives. It concludes with a discussion of how the eCDI application from Meta Health Technology enables facilities to more effectively manage these critical programs.

The CDI Process Today

For many facilities today, the CDI process is as follows.

- The clinical documentation improvement specialist (CDIS) identifies his/her review caseload for the day based on specific patient criteria, such as assigned nursing unit, financial class or service area.
- The CDIS reviews the concurrent medical record, typically within 24 to 48 hours of patient admission to the hospital, and documents the review information on a hardcopy worksheet.
- The CDIS examines the record to determine whether the documentation requires additional clarification or specificity from the physician.
- If the documentation in the record includes ambiguous, unclear or contradictory information, the CDIS initiates a written or verbal query to the physician to obtain additional documentation and/or clarification.
- The CDIS awaits the response from the physician. The query may go unanswered if the physician is unavailable or simply does not respond.

CDI Process Challenges

For many facilities, one major challenge is the cumbersome, manual processes for identifying cases for daily reviews. CDI specialists often spend valuable time sorting through hardcopy census reports, manually highlighting appropriate cases based on specific patient criteria.

Once case reviews are underway, the physician query process can present some of the most daunting challenges in the CDI program. Despite the good intentions of the various stakeholders—and the acknowledged impact on documentation quality and hospital reimbursement resulting from unanswered queries—there are numerous reasons why so many hospitals experience problems with physician queries.

- *Lack of time and resources required to create non-leading, succinct queries that will elicit necessary responses from physicians.* Facilities may not have established language for queries, so CDI staff are required to create a query from scratch each time. Other facilities have hardcopy query template forms that are not readily available to the CDIS, creating an inefficient query generation process.
- *Inaccessibility of physicians.* CDI staff, HIM staff, and physicians may all be on different time schedules, making it difficult to locate the physician for questions regarding documentation. Physicians also may not have the ability to answer queries remotely or electronically.
- *Excessive time required for ongoing follow-up with physicians to ensure that query responses are received.* Verbal query discussions often require additional follow-up to obtain the necessary documentation in the medical record, producing an inefficient “back and forth” communication process.
- *Inability to reconcile concurrent queries initiated by CDIS upon patient discharge.* Queries that were created during the patient stay that go unanswered often are dropped post discharge because HIM staff do not have the required information to follow up or close the query.

Additional challenges for the CDI program include...

- *Lack of system integration.* DRG identification often has to be done manually, and CDI staff will not have the ability to compare various coding/DRG scenarios.
- *Lack of appropriate management tools needed for tracking, monitoring and reporting the CDI process.* Management reports are difficult to compile on a timely basis, as information must often be collected manually and reformatted into legible reports.

Meta's eCDI Solution

With an increasing number of healthcare facilities adopting Clinical Documentation Improvement programs, Meta Health Technology developed the eCDI application to provide facilities with a comprehensive web-based product to address all phases of the CDI workflow process.

Streamlines Workflow

Meta's eCDI application includes workflow automation capability that provides an automated prioritized case review list for the Clinical Documentation Improvement Specialist. The workflow feature also enables physicians to be notified automatically when new queries are sent for their review. In addition, the application sends automatic reminders to physicians regarding outstanding queries based on a facility-defined timeframe.

When the physician responds to a query, the software automatically provides a status update for the CDIS, thus eliminating the need to continuously search the medical record for a query response. Once the query is generated, the software's tracking capability also allows the CDIS and HIM staff to review its current status at any time. Furthermore, if the physician created an electronic document with the response, the electronic document can be routed to the facility's EMR or imaging system.

Streamlines Query Communication

Meta's eCDI software tackles the problems inherent in the query process by facilitating communication between the CDIS and the physician. The application allows the CDIS to easily generate a query and attach a scanned or electronic document as a reference. The comprehensive query is then readily accessible to the physician from any remote location via a HIPAA-compliant link. In response to a query, the physician can create and attach a facility-specific electronic document (e.g., progress note) that is automatically e-signed, and date and time stamped.

The query can also be forwarded to another recipient. Forwarding the query further streamlines the communication process, as it allows the original recipient of the query to send the query on to another individual for input or follow-up without having to manually deliver the document. In addition, any concurrent queries initiated by the CDIS will be available to the coder following patient discharge, eliminating both the need for the coder to review a hardcopy query worksheet and the possibility of redundant queries.

Simplifies Query Creation

Whether the clinical documentation improvement initiative is managed by HIM, Case Management or another department, the facility undoubtedly spends many hours training the responsible staff on the process for creating successful, compliant queries. With eCDI, users can build their own query templates, or take advantage of an

optional DRG-specific query library containing templates, including Medicare MS-DRGs, APR DRGs, and New York State APR and AP-DRGs. These query templates are Medicare-compliant and thus eliminate the need for the CDI or HIM staff to spend time discerning whether or not the queries are non-leading.

In addition to electronic queries, the CDIS can document the outcome of the verbal query exchange with the physician directly into the eCDI application. Capturing this valuable information in real time makes it available later for inclusion in comprehensive query activity reports.

Helps Focus the CDI Program

The eCDI application provides real-time reports to help a facility determine which clinical service areas require the greatest documentation improvement efforts. Facilities can report on physician query activity and response rates, providing necessary information for enforcing physician accountability. In addition, the software provides reports that note the reason for the query, allowing the facility to identify clinical documentation issues requiring further physician education. It also provides CDIS-specific productivity reports. Timely access to this information allows Administration to avoid or reduce the expense of retaining outside consultants to conduct extensive analysis.

Summary

Implementing a clinical documentation improvement program is an effective way to ensure that documentation in the medical record supports the patient’s true clinical experience. Meta’s eCDI application provides a workflow-driven process that streamlines communication, enables better query tracking and accountability, and eliminates the many obstacles inherent in the traditional CDI process. The software helps ensure that the CDI initiative produces optimal results for the institution, including better patient care, compliance with regulatory requirements and appropriate reimbursement.

If you’d like to discuss your facility’s CDI program, or if you’d like more information about Meta’s products, please call us at 800.334.6840.

