Implementing a Physician Coding & Documentation Support Model

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AAPC National Conference
April 5, 2011
Long Beach, CA

Today’s Discussion ~

- Introduce Kaiser Permanente and Southern California Region
- Create an Environment of Collaboration
- Building an Infrastructure to Support Coding/Documentation
- Establishing a Physician-in-Charge (PIC) role
- Review our Educational Journey
  - Specialty-specific coding/documentation education process
  - Timeline: Web-based training modules
- Discuss where we go from here
- Provide Key-Take Away’s
- Questions/Answers
Who Are We... Where Do We Begin?

Southern California Region:
- 5,500+ providers
- 17,000+ nurses
- ~ 48,000 FTEs
- 13 Medical Centers
- 148 Medical Office Bldgs

- Implemented the largest integrated electronic medical record in U.S.
- Landscape and payer mix shifting to employer paid plans increasing fee-for-service membership
- Most providers had little to no past coding knowledge or experience
- Significant cultural and operational changes
- Need to create a foundation to support coding and documentation knowledge to build upon
- Executive leadership sponsorship and support was critical to our success
SCPMG Clinical Doc. & Audit Operations

Department Mission

“To provide the Audit, Education and Quality Assurance infrastructure, and the processes to effectively support Clinical and Operational business imperatives specific to physician documentation, coding and charge capture.”

- Regional Team (~ 75 employees)
  - Compliance Auditors, Data Quality Supervisors (DQS), Manager, Practice Leaders, Project Managers, Analysts, and Administrative Support Team
- Medical Center Team (~ 120 employees)
  - Compliance Auditors, Data Quality Managers (DQM), Manager, Practice Leaders, Project Managers, Analysts, and Administrative Support Team
- Credentialed in coding, documentation and compliance
  - CPC, CCS, CCS-P, RHIT, RHIA
  - CHC, CHCC
  - Specialty Certifications
  - Clinical (MD, RN, etc)
Team Responsibilities

Data Integrity

Develop/Conduct Education (Group, 1:1, WBT)

Analyze Audit Data & Trends
Prepare & Deliver Results

Identify & Determine Audit Focus Areas
Define Audit Scope, Requirements & Tools
Conduct Audits & Performance Quality Assurance

Compliance

Accurate & Complete Code Capture

Education Scope of Responsibilities

- Serve as primary resource and clearing house for quality of information relating to Coding and Documentation.
- Promote Data Integrity, Consistency and Standardization through Training, Education, and focused Communication.
- Provide Delivery Expertise on Transfer of Coding Knowledge.
- Seek out and provide opportunities for iterative and timely Education.
- Stay knowledgeable of, and to strategically leverage, emerging adult learning technologies.
- Ensure that the development of educational content remains directly tied to business and clinical strategic goals.
Create an Environment of Collaboration

- With the size and scale of our Medical Group we established a train-the-trainer / M.D. Champion model as we deployed our Ambulatory electronic medical record (KPHC)

- Each of the 13 Medical Centers designated specialty-specific M.D. Champions in an effort to utilize a train-the-trainer model to support code capture within the Ambulatory KPHC system

- Established Medical Center specific Ambulatory and Hospital M.D. Coding Liaisons

- Defined the role and responsibilities of the specialty-specific M.D. Champions and the Ambulatory and Inpatient M.D. Liaisons

Contracted with external consultant to conduct several internal KP Coding Boot Camps for the M.D. Liaisons and specialty-specific M.D. Champions

Worked collaboratively with technical KPHC/other resources to create tools to assist the providers with their coding and documentation workflows in the Ambulatory setting

Integrated provider workflows into the coding and documentation training content to reinforce KPHC workflows
Southern California Physician Certified Professional Coders (CPC)

<table>
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<tr>
<th>Specialty</th>
<th># CPC</th>
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<tr>
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<td>Ped General</td>
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<tr>
<td>Surgery Colorectal</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>79</strong></td>
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Note: As of December 2009

- Total of 79 CPC Physicians
- Several of our CPC physicians have obtained their Specialty credentials:
  - Dermatology
  - General Surgery
  - OB/GYN

Building an Infrastructure to Support Coding & Documentation

- Critical Success Factors:
  - Regional executive level sponsorship and ongoing commitment
  - Medical center leadership sponsorship and support
  - Providing physician champions training to increase their level of knowledge and confidence, and to obtain certification as a CPC
  - Requires weekly time commitment away from patient care
  - Empower the physician champions with clear role definition and “authority” to train and communicate coding concepts, etc.
  - Collaborate with other areas across the enterprise on business and clinical strategic goals (e.g., HEDIS, POE, etc.)
Building an Infrastructure to Support Coding & Documentation (cont’d)

- Critical Success Factors (cont’d):
  - Create a specific role for Physician-in-Charge (PIC) Clinical Documentation & Audit Operations
  - Recognize the contributions of the team members
  - Develop a partnership and working relationship with local Data Quality Manager (DQM) and compliance auditors
  - Establish regular communication and knowledge sharing opportunities
    - Implemented monthly half-day meetings to enable M.D. Liaisons, DQM, and Regional leadership team to share progress, gaps, challenges, gain support, collaborate, and develop educational strategies, etc.
  - Develop ongoing monitoring metrics and reports to drive performance

Physicians in Charge (PIC)

- Formalize the role of the M.D. Liaisons:
  - Physician in Charge (PIC) Clinical Documentation & Audit Operations

- Primary responsibilities include:
  - directing the Medical Center-wide documentation and coding training for professional services for SCPMG physicians
  - assuring physicians understand and comply with the various state and federal coding/regulatory guidelines
  - Interacting with the Data Quality Manager (DQM) in planning, developing, implementing, and administering documentation and coding training
Physician in Charge (PIC): Additional Responsibilities

- Partnering with other physician champions or leads from the licensed or continuing care setting, as charge capture work moves into the licensed setting.
- Establishing and maintaining relationships with KPHC physician leads (ambulatory, inpatient, emergency department and other settings as appropriate), Chiefs of Service, and Senior Leaders of the Medical Center through meetings, influence, and collaboration.
- Working with the Regional team to implement and monitor organizational policies and procedures that support business imperatives specific to coding compliance and data integrity.

Physician in Charge (PIC) Coding & Documentation Specific Duties

- Meet on a regular basis with each department at the local medical center to provide updates and training to physicians on recent documentation and coding guidelines changes, etc.
- Report on a monthly to Area Medical Director on the status and progress on:
  - Audit results & Training plans
  - Status of metrics measuring progress in documentation and coding
  - Emerging strategic opportunities, as well as ongoing operational issues and challenges
- Report on a monthly to the Regional Physician Liaison Committee on Local Medical Center progress in training and disseminating documentation and coding guidelines.
  - Communicate gaps and needed support in local area medical center efforts.
Physician in Charge (PIC) Coding & Documentation Specific Duties

- In partnership with physician leadership and Regional Physician Liaison Committee, develop and implement local physician and auditor coding/documentation training programs designed to further physicians’ knowledge and understanding of community standard documentation requirements.

- Partner closely with KPHealthConnect and Business Optimization teams to develop workflows and tools to enhance physician use of the EPIC system.

- Maintain role as a physician leader in promoting accurate, complete, and thorough documentation and coding knowledge in the medical center.

- Maintain credentials as a Certified Professional Coder.

New Documentation & Coding Educational Program

- Regional Coding Leadership Review educational content and provide recommendations.

- Use specialty physicians to assist with clinical review and input.

- Communication is done clearly with goals and timelines that are set at the Regional Committee level.

- Each PIC coding then takes to each medical center and relays information to the front line doctors:
  - Champions in each department
  - Chiefs
  - Classroom presentations with the PIC and DQM

- Conduct post training audits to measure effectiveness of training initiatives.
Education Journey

- Phase 1: Introduce Coding & Documentation Concepts
  - Developed three introductory web-based training modules
    - Introduction to Clinical Documentation
    - Introduction to ICD9, CPT4 and Modifiers
    - Introduction to Evaluation and Management Coding
- Phase 2: Specialty-specific Coding & Documentation
  - Created 34 specialty-specific educational presentations
  - Utilized Specialty M.D. Champions to assist with determining training curriculum, provide feedback on content, and in some circumstances participate as co-trainer for classroom sessions
  - Developed specialty-specific participant workbooks and laminated coding tools
  - Eventually, moved all content to web-based training modules

Education Journey: (cont’d)

- Phase 3: Specialty-Specific Documentation & Coding Refresher courses
  - Developed presentations and numerous coding and documentation job aids, tools, and frequently asked question (FAQ) documents
    - Coding Fundamentals (Do’s & Don’ts)
    - Documentation Known Problem Areas
    - Global Surgery Package & Modifiers
    - Integrated case scenarios, diagnosis coding, and KPHC workflows
  - Conducted a total of 37 classroom training sessions over the course of 4 months partnering “key” physicians with external coding consultant trainers
    - Total of 530 physicians attended
  - Migrated training content to web-based training modules
Specialty-Specific Education Development Process

Timeline: Web-Based Training Modules

- **2008**: Introduction to Clinical Documentation WBT. Introduction to ICD9, CPT® and Modifiers WBT. Introduction to Evaluation and Management Coding WBT.
- **2009**: Inpatient Clinical Documentation & Coding WBT. Hospital Outpatient Visit Clinical Documentation & Coding WBT. Emergency Medicine Clinical Documentation & Coding WBT. Malignant Neoplasm Diagnosis Coding WBT.
- **2010**: Documentation and Coding Refresher WBT.

*Content developers met with the champions of each specialty prior to the training sessions and sent revised training to those champions for review and approval.
*Training materials included the presentation, job aids, coding books, case examples, and final exam (where applicable).
Where Do We Go From Here?

- Continue to reinforce the importance of coding and documentation accuracy and completeness to support:
  - Patient Safety
  - Quality Care
  - Clinical Strategic Goals
  - Revenue Capture
  - Compliance
- Partner with other areas/departments as we prepare for ICD-10-CM implementation
- Provide educational opportunities for our providers and auditors
- Expand our physician and auditor CPC specialty certifications
- Continue to refine and enhance various types of technology tools to support workflow, efficient code capture, and clinical business imperatives

Key Take-Away’s

- Develop a culture of collaboration and team work among physicians, coders, auditors, and compliance
- Obtain executive level sponsorship and support
- Establish opportunities for knowledge transfer
- Define and understand the challenges
  - Coder language vs. Clinical language
  - Clinical and operational workflows
- Develop “physician” friendly educational curriculum, presentations, job aids, and coding tools
- Utilize physician/coder trainer model to educate on coding/documentation requirements
- Create metrics to monitor performance and outcomes
Collaboration is the Key to Success

Realize that Nothing is Impossible