CLINICAL

DOCUMENTATION

INTEGRITY

ChartWise Overview

chartwise CDI

VALUE PROPOSITION

Benefits of CDI and ChartWise

CDI: ENSURING CODES ACCURATELY REFLECT CARE

Query Process

CDI

Patient Care
- EMR
- Lab Records
- Pharmacy
- Progress Notes

- PDx
- CC/MCC Capture
- Clinical Evidence

Coding
- Billing
- Quality Measures
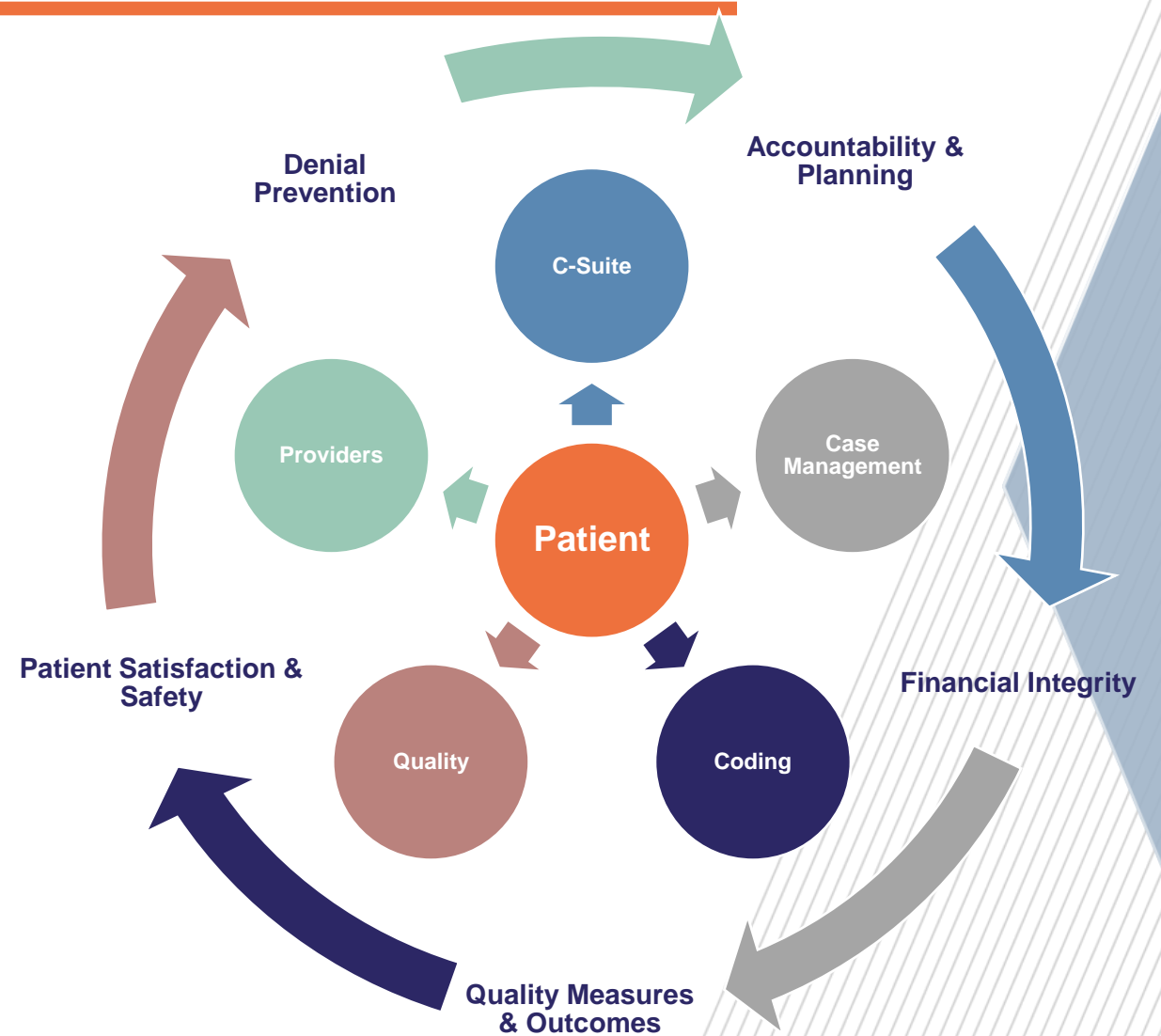- Reporting
- Denials/Audits

Reconciliation
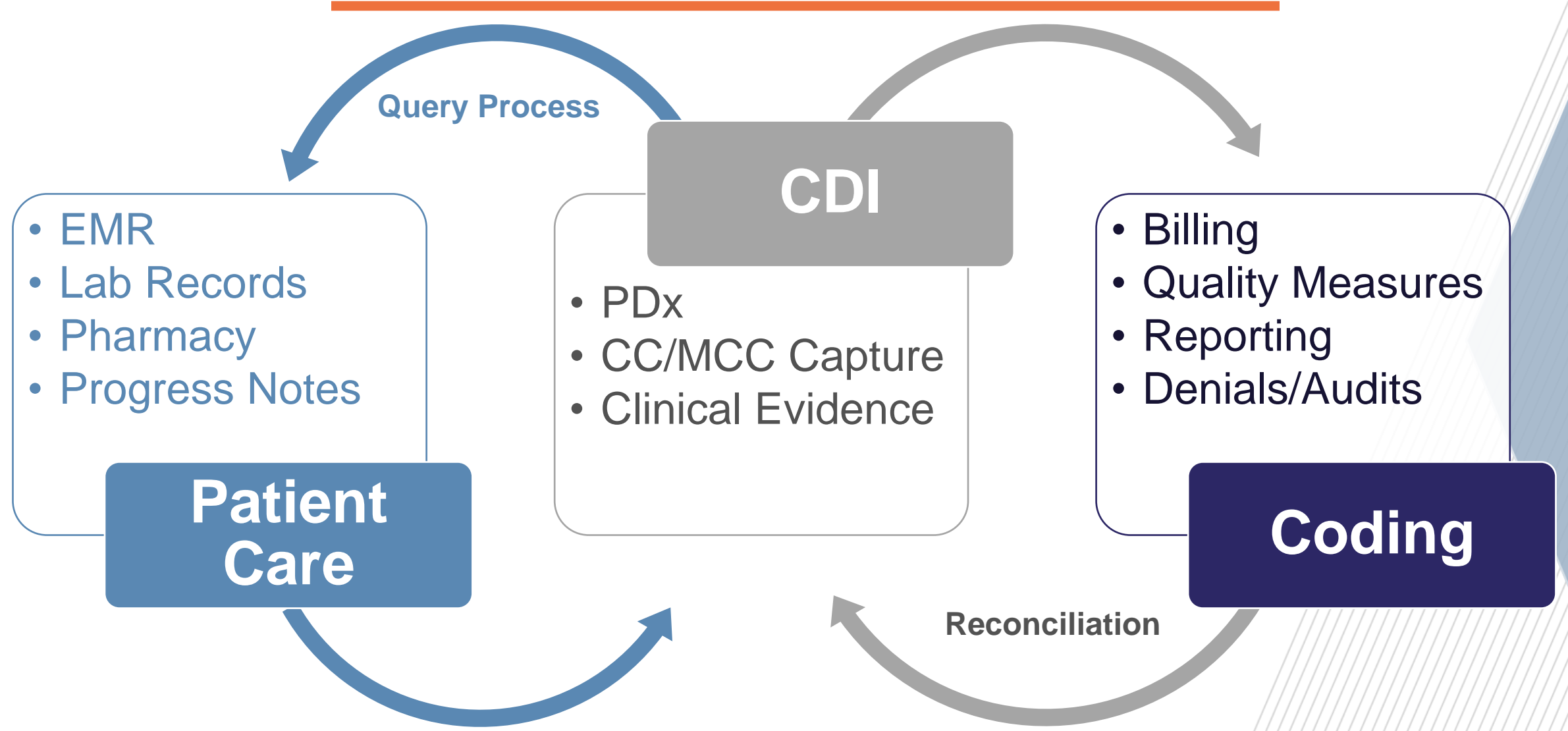
CHARTWISE BENEFITS FOR PATIENT-CENTERED CDI

ChartWise CDI is uniquely designed to help Clinical Documentation Specialists easily prioritize, review, and improve the accuracy and completeness of physician documentation. The CDS can build and manage queries pre-populated with patient data and clinical content, all concurrent with the patient's care. Physicians receive queries via your preferred workflow—through the EMR, electronic, paper, hybrid, or even by mobile app. The ChartWise software can then track the status of the review process, analyzing the impact of the reviews on a variety of financial and quality metrics.

An added benefit to using ChartWise CDI is a powerful expertise feature, clinical content which helps a CDS discover additional diagnoses, procedures, and queries to be considered based on existing data and documentation. Plus, there are functions to help the physicians improve their documentation and respond quickly and completely to the CDS queries.
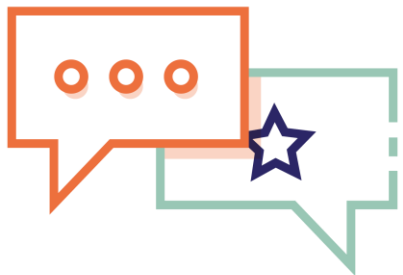
Through robust reporting as well as integration with Microsoft's Power BI dashboard, ChartWise also ensures managers and hospital administrators receive comprehensive information to manage the Clinical Documentation Integrity (CDI) program, assessing the day-to-day functioning and productivity as well as the overall impact on financial and quality measures.

Denial Prevention

Accountability & Planning

C-Suite

Providers

Case Management

Patient

Patient Satisfaction & Safety

Financial Integrity

Quality

Coding

Quality Measures & Outcomes

PROVEN TO BE THE BEST

135+ Hospitals
28 Million Cumulative Visits

Excellent Client Retention & Satisfaction

"A"-rated or better in every KLAS metric

Preferred CDI Solution Partner for State Hospital Associations and Leading CDI Companies

5x – 15x Annual Customer ROI

Positive CMI & Risk Adjusted Claims Based Impact

DISCOVERY GUIDE

Having an Open-ended Conversation About CDI

USING THE DISCOVERY GUIDE

Qualification & Discovery Guide

INSTRUCTIONS: The following is intended to guide discussions with a **CDI** prospect, giving the rep cues for information to listen for and questions that will prompt a consultative discussion. Every prospect and stakeholder will differ slightly, and it is best to avoid a rote "script." Following open-ended questions rather than "yes/no" or options will more likely yield important information. Listen for key data points along the way, asking about specific data points as follow-up within context of discussion.

KEY DATA POINTS & HEALTH IT

Current CDI Program (trained staff)? Y/N			How long:	
If Yes: (Fill in Y/N or answer)	Inpatient Only:	Outpatient:	Emergency Dept:	
	Medicare Only:	Managed MC:	All Payor:	
	% of Total Reviewed:			
	Current CDI Software (CDS workflow):		CDS FTEs:	
EMR:		Encoder:		
Case Mix Index:	Discharges (MC/Total):	ADC:	Beds:	

CONVERSATION STARTERS

1. Do you have an existing CDI Program? *(If Yes, continue with questions and collecting Key Data Points. If No, then refer CDI Solution Sheet to describe benefits of a CDI Program.)*

   a. How long has your CDI Program been in place?

   b. Are your Clinical Documentation Specialists dedicated or integrated?

   c. How many CDS (Clinical Documentations Specialists)?

   d. Are they reviewing records concurrently (during stay) or retrospectively (discharged)?

   e. What is the reporting structure? (i.e. through Case Management, HIM, Revenue Cycle)

- Focus on selling extended value to the organization – get connected to HIM, Finance, Quality, etc.

- What tools do you use to ensure coding and EMR documentation is complete and accurate?

- Are you familiar with CDI and tools that support physician documentation?

- Who looks at new technologies to capture appropriate revenue and ensure compliance?

Look for opportunities to have open-ended conversations that allow you to collect critical information to qualify, connect with the right stakeholders and which position you as a resource.

CURRENT STATE EVALUATION

The First Step With a Qualified Prospect
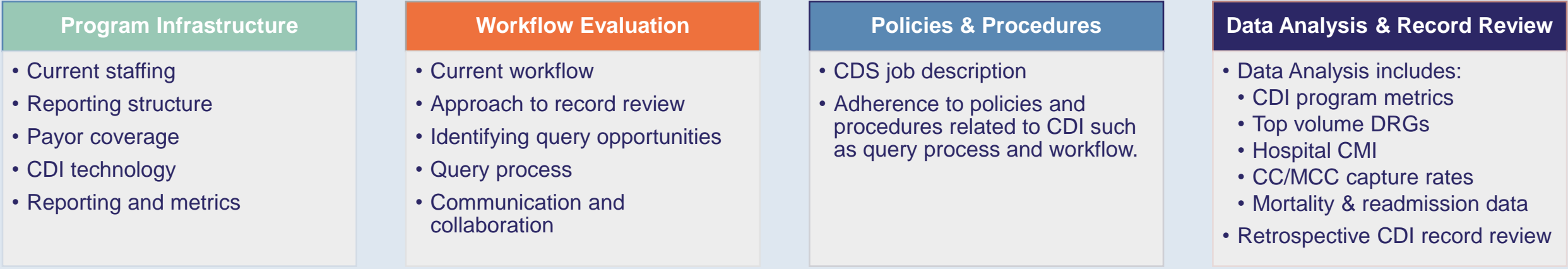
CURRENT STATE EVALUATION (CSE)

ChartWise experts can help you "pulse check" and validate your current CDI staffing, processes, and tools, identifying strengths and opportunities to advance your program.

More than a static analysis of financial data, the ChartWise Current State Evaluation (CSE) engages your CDI team directly to provide a documented report of findings and recommendations.
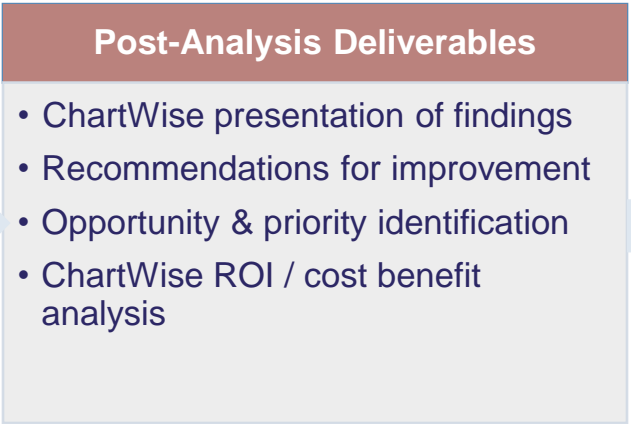
Note: As part of our partnership with CPSI/TruBridge, we will offer a CSE at no cost as part of software consideration process.

CSE PROCESS AND OUTCOMES

STEP 1: Interview. Observe. Analyze.

Program Infrastructure

- Current staffing
- Reporting structure
- Payor coverage
- CDI technology
- Reporting and metrics

Workflow Evaluation

- Current workflow
- Approach to record review
- Identifying query opportunities
- Query process
- Communication and collaboration

Policies & Procedures

- CDS job description
- Adherence to policies and procedures related to CDI such as query process and workflow.

Data Analysis & Record Review

- Data Analysis includes:
  - CDI program metrics
  - Top volume DRGs
  - Hospital CMI
  - CC/MCC capture rates
  - Mortality & readmission data
- Retrospective CDI record review

STEP 2: Report.

Post-Analysis Deliverables

- ChartWise presentation of findings
- Recommendations for improvement
- Opportunity & priority identification
- ChartWise ROI / cost benefit analysis

STEP 3: Advance.

Future State

- Holistic approach
- Engaged stakeholders
- Aligned leadership
- Attained compliance and KPIs

ChartWise™ CSE Summary for (Sample Client)

METRICS

Current State: (8.6/10)
- Multiple sources and formats for obtaining CDI metrics
- Most metrics meeting benchmarks except for Physician Response Time in excess of 48 hours

Recommendations:
- Implement strategies to improve physician response time, i.e., consider ChartWise CDI software solution with Mobile App for Provider querying
- Establish real-time reporting capabilities for collecting, tracking, and trending CDI Program metrics and KPIs

CDI PRACTICES

Current State: (30/40)
- Does not perform initial reviews within 24 hours of admission
- Does not consistently pursue all additional diagnoses that may have impact on RW, SOI, ROM and HCCs

Recommendations
- Holistic record review to promote capture of all diagnoses documented and improve capture of secondary diagnoses
- Implement a CDI Chart Audit process for performance management in the capture of all secondary diagnoses

FOUNDATION

Current State: (17.2/20)
- Multiple retrospective CDI queries that require follow-up time, negatively impacting productivity

Recommendations:
- Industry Best Practice is to review 95% of in-scope cases
- CDI Advanced Education to include action planning for reducing volume of retro-queries (i.e.,improving awareness, urgency in querying topics concurrently)
- CDI Leadership Enhancement education, managing with metrics

Staffing Projection
- All Payor 95% reviews requires 12.1 FTEs at x and 9.8 FTEs at y.

COLLABORATION

Current State: (8.3/10)
- Need for structured CDI Education in the onboarding of new physicians
- No standardized approach for supporting role of Physician Advisor
- Nursing documentation could be improved for more relevant clinical indicators in building queries
- Limited sharing metrics. successes at quarterly Steering Committee Meetings

Recommendations:
- Develop standardized network of Physician Advisors and contribute to their onboarding and ongoing education, sharing regular MD reports
- Improve visibility among Nursing Leadership and quarterly Steering Committee Meetings

SOFTWARE

Current State: (14.2/20)
- Limited reporting capabilities with current CDI Software
- Reporting on concurrent vs. retro-queries is limited, not considered reliable
- Provider e-signatures on queries causing a great deal of rework

Recommendations:
- Lean up the e-signature process for better compliance and workflow efficiencies
- Establish regular and reliable reporting capabilities for CDI Program tracking
- Consider ChartWise CDI software solution with Mobile App for Provider querying

FUTURE STATE:
Engaged Stakeholders
Aligned Leadership
Performance Reviewed Regularly
Compliance and KPIs met
Review Rate ≥ 95%, All Payors
≥ 30% Query Rate, ≥ 95% Resp. Rate
≥ 90% Query Agreement Rate
Reconciliation daily
Holistic approach to
record reviews

Cumulative Standardization Weighted Score: 78

CSE EXAMPLE – MULTI-FACILITY SYSTEM

Data Analysis Findings

- **Data Analytic Process**
  - ChartWise Predictive Impact Analysis Tool
  - Hospital Data Measures
  - Sample Retrospective Record Review
- **Core Finding**
  - **Opportunity for a higher level of severity documentation with a potential Case Mix Index improvement of 3-5%**
- **Additional Recommendation**
  - Inpatient Coding Audit
- **Benefits**
  - Coding Practice for high risk DRGs
  - Observation & Length of Stay Analysis

Retrospective Record Reviews

Retrospective Record Review Scope & Selection Criteria:
- 50 inpatient records (5 per CDS), random selection provided by JMCGH
- LOS 2-5 days
- DRG mismatches and matches
- Cases with and without CDS queries
- Surgical and medical cases
- Discharge date range from August to September 2019
- Final billed DRG status

Total Financial Impact*: **$48,290.25**
- Total Missed Diagnoses: 127
- Total Missed Procedures: 5
- Total Missed Queries: 54
- Total Noncompliant or Inappropriate Queries: 0
- Total SOI/ROM Shifts: 10
- Total Case Mix Index Shift: 6.4387

Financial Impact & Case Mix Index (CMI)

Jan-June 2019

	Jan	Feb	Mar	Apr	May	Jun
Financial Impact	$1,106,923	$1,155,828	$1,296,189	$1,230,341	$1,001,030	$950,984
Acute CMI (Exc. NB)	1.7798	1.8445	1.7458	1.8231	1.7503	1.6604
Medicare CMI	1.8989	1.9455	1.9128	1.9855	1.9113	1.8331

CDI SOFTWARE SOLUTIONS

Core CDI

CHARTWISE – A TOTAL CDI SOLUTION

ChartWise specializes in full-featured, scalable solutions for Clinical Documentation Integrity. AI-driven, integrated, and comprehensive, ChartWise enables physician documentation that fully supports coding and billing as well as improves quality measures and clinical outcomes.

ChartWise is the only CDI software designed by actual CDI users—clinicians and Clinical Documentation Specialists—to be easy to implement, understand, and use. It features prioritization, automated queries, flexible workflow, dynamic reporting, and denials prevention, benefitting hospitals with reduced risk, actionable data, and a proven fast ROI.

We can also help you evaluate, implement, and maintain an end-to-end CDI program tailored to you. Our clinical, coding, and documentation experts apply practical experience to every aspect of CDI, offering a full array of Advisory Services.

- **ChartWise CDI Software**
  - IP & OP
  - AI-enabled
  - Easy to integrate

- **Advisory Services**
  - Assessments, audits, consulting
  - CDI implementation, education
  - Remote & outsourced solutions

WORK SMARTER WITH CHARTWISE

Prioritization
AI-driven case review with clinical evidence, suggestions, and alerts

Workflow
Adapts to your workflow, whether paper-based or fully electronic

Expertise
Built-in clinical intelligence for a complete diagnostic picture

Provider Tools
Engage providers with mobile app and EMR embedded queries
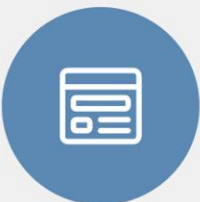
Interface
HL7 interfaces reduce manual data entry, improve data quality

Reports
On-demand robust DataScan analytics, reporting and alerts

Security
Highly secure, fully encrypted patient database
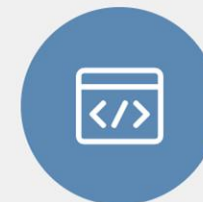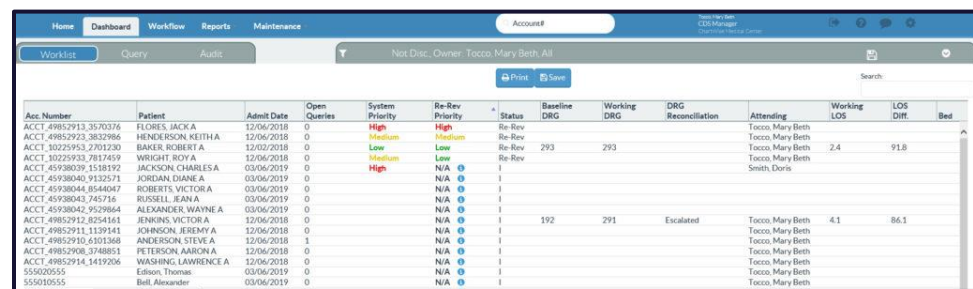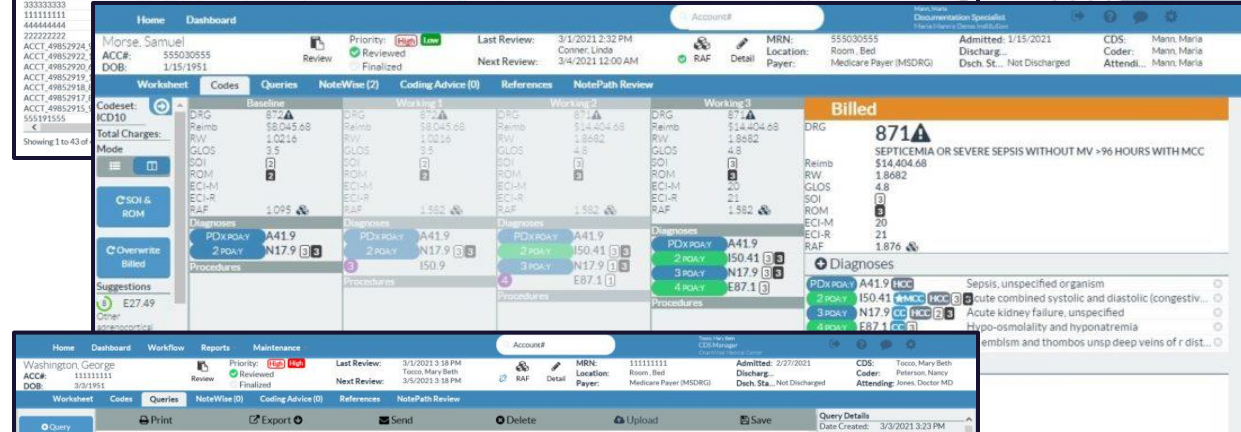
Encoder
Built-in TruCode Essentials encoder with Coding Clinics and other references

CHARTWISE KEY FEATURES

- ## AI-Driven Prioritization
  - Embedded clinical intelligence and rules plus a common-sense, user-inspired design prioritize the top financial, quality, and patient safety opportunities.

- ## Advanced Workflow
  - Give documentation specialists the tools to do their job efficiently and accurately and have the biggest impact on quality data and proper reimbursement.

- ## Timeline Of The Review
  - See how the documentation evolves as the admission is reviewed and queries are sent.

- ## Smarter Queries
  - Standardized AHIMA conformant queries ensure a consistent and compliant program, with embedded logic and rules driving clinically-based suggestions.

CHARTWISE KEY FEATURES

- ## Available Mobile App
  - Reduce query response times and increase physician engagement with the ability to send queries and get responses right in the app.

- ## Built-In Content & Advice
  - Comprehensive clinical, quality, patient safety, and coding content drives the NoteWise rules engine, available right in the workflow to provide alerts and prompt action.

- ## Real-time Reporting
  - Get on demand real-time information to manage your program and make immediate course corrections. Dynamic reporting and management dashboards let you dig deeper into your data.

- ## Dashboard & BI Integration
  - Access KPIs and CDI performance metrics through Microsoft's Power BI dashboard to tell your CDI program's story to key stakeholders in your organization.

COMING SOON

Innovations & Ideas

SMALL HOSPITAL CONSORTIUM

Solving the CDI Catch 22: A CDI program with the right tools provides more accurate, complete documentation, which leads to more accurate coding, fewer denials, and support for value-based payment models, all of which support financial performance. Yet CDI programs and tools are often viewed as too expensive, overly complex, and slow to deploy, overleveraging limited resources and disrupting workflows.

ChartWise ensures physician documentation can fully support coding and billing as well as improve quality measures and clinical outcomes. It prioritizes cases, uncovers clinical evidence, and tracks the impact of documentation on coding, providing a complete diagnostic and financial picture. Even so, it is uniquely designed to fit small hospital requirements:

**Upfront Expense**

Return on Investment
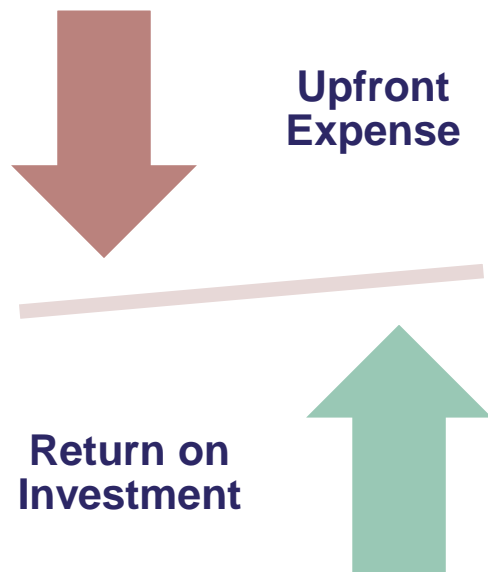
- **SaaS:** Fewer IT resources required
- **Scalable:** 30-40 day implementation, no unnecessary add-ons = faster ROI
- **Flexible:** Fits withing existing workflows
- **Comprehensive:** Total CDI solution for improved financial integrity, quality & patient care that optimizes existing IT investments

OUTPATIENT – THE WHOLE PATIENT STORY

Outpatient CDI software from ChartWise allows Accountable Care Organizations and Health Systems to extend the reach of their CDI program to Primary Care Ambulatory and Outpatient Clinic sites, capturing Risk Adjusted Factor (RAF) scoring and Hierarchal Condition Categories (HCCs) to optimize new payment methods based on these.

ChartWise software for the outpatient environment uses the same user-driven design and established workflows as our inpatient software, so your CDI team won't need to adapt to new workflows or learn new software.
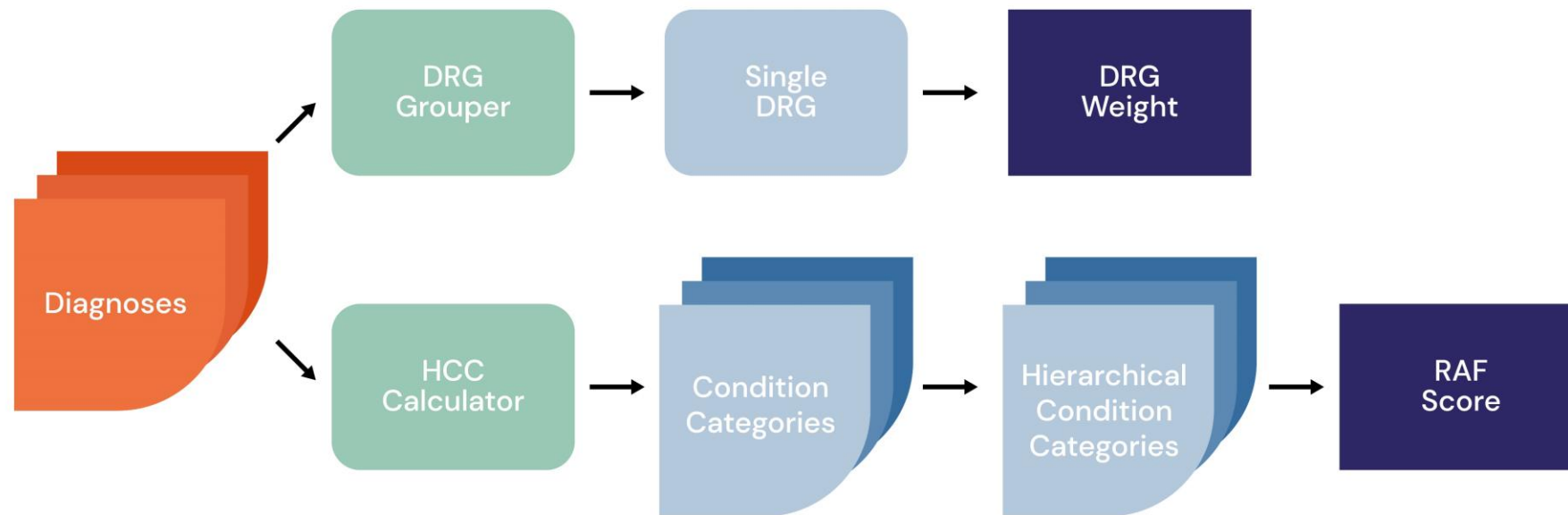
Thank you.

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