



CPEP

Medical Record Keeping Seminar & Personalized Implementation Program

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Seminar Locations

Pre-Pandemic



Denver



Charlotte



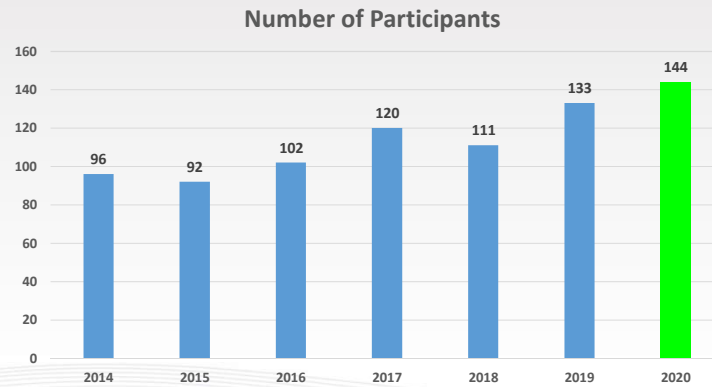
Newark

Today



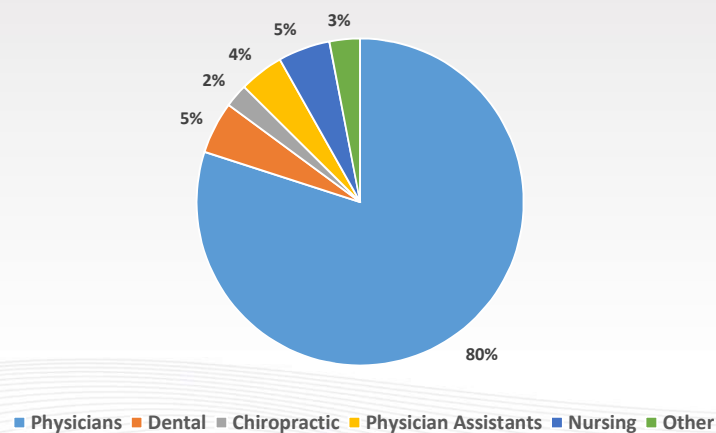
CPEP LIVE – Live, Interactive Video Education

Growth and Expansion of Medical Record Keeping Seminar



50% Growth Since 2014

Who Uses the Medical Record Keeping Seminar?



Medical Record Keeping Curriculum

SEMINAR

- 8 hour contact hours
 - 2 hours of pre/post-work
- 10 hours CME provided



FOLLOW-UP PROGRAM

Personalized Implementation Program (PIP)

- 6 month follow-up program

Common Deficiencies

Notation of Allergy

Chronic problem lists

Medication lists

Adequate content and/or structure of the note

Coumadin monitoring flow sheet

Clinical thinking

Diabetes flow sheets

Pain Management contracts

Health maintenance flow sheets

Common Deficiencies

Clinical judgment & rationale

Clinical thinking
 Diabetes flow sheets
 Notation of Allergy
 Health maintenance flow sheets
 Adequate content and/or structure of the note
 Medication lists
 Chronic problem lists
 Pain Management contracts
 Coumadin monitoring flow sheet

Common Obstacles

Time
 Awareness
 Lack of training
 Motivation
 IT Savvy
 Money

Covers most healthcare settings...

Office



Inpatient/SNF/NH



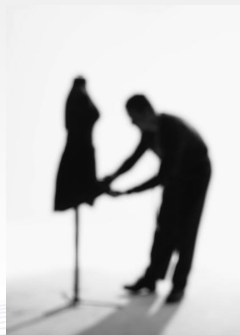
Operating Room



ED/UC



Individualized Attention



Tailored to the Participants

- Course material is targeted to specific needs of the specialties/professions in attendance

Pre-Seminar Activities

- Chart self-audit
- Chart review
 - Participant submits 3 patient charts
 - Receives targeted written feedback on documentation
 - Verbal available upon request
 - Feedback is discipline-specific (e.g., medical, dental) and specific to type of encounter (e.g., office, inpatient, surgical)

Incorporates Documentation Guidelines

Joint
Commission
(JC)

National
Committee for
Quality
Assurance
(NCQA)

Center for
Medicare and
Medicaid Services
(CMS)

State Licensing Boards

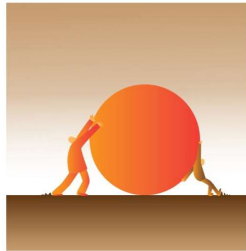
Seminar

The Importance of Good Documentation

Core Principles of Good Documentation



Overcoming Obstacles



Medico-legal risk

*Developed by Risk Managers
at COPIC Insurance Company



Seminar

- Essential Concepts
 - Individual notes
 - Record and Recordkeeping System
- Medicolegal Risks
- Setting-Specific: Inpatient, Surgical, Office
- Pitfalls of coding
- Time Management
- EMR content integrated throughout
- Special areas such as prescribing controlled substances

What We Don't Cover...

Enhancing billing and collections

Final Activity and Homework

- Documentation Work Plan: *Intent to change*
 - Commitment for improvement
 - 3 areas
 - SMART goals
 - Self-developed and individualized

Change is
a Process
not an Event!

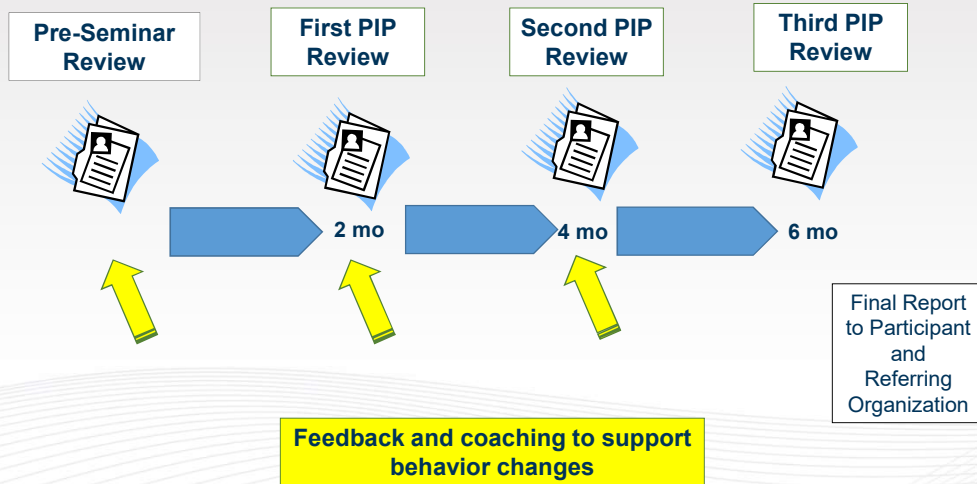
Personalized Implementation Program (PIP)



- 6 month follow-up program to Medical Record Keeping seminar
- Address practical challenges to changing ingrained documentation habits
- Receive ongoing coaching and chart reviews
- Allows for incremental change and feedback over time
- Demonstrate application of new knowledge
- Open to participants who attended the Seminar
 - Optional – consider whether to require PIP
 - Separate enrollment and fee

Provides an objective measure of improvement (Pass/Fail)

Follow-up Process



**Participant selects 3 charts to be reviewed for each chart submission with CPEP guidance.*

At the Completion of PIP



Participant and the referring organization receive

- Written Final Summary Report
- Grade: Pass or Fail

General Expectation for Passing Grade

- Notes that “stand alone”
- Accurately reflect the care provided
- Convey rationale

Impact of Seminar and Follow-up Program (PIP) 2017 study

| COMPARISON OF RECORD QUALITY FOR PIP PARTICIPANTS <i>Pre-Seminar Records Compared To Final Chart Review (N=58)</i> | | | |
|---|-----------|-----------------------------------|-----------|
| Rating on Pre-Seminar Chart Review | | Outcome at PIP Final Chart Review | |
| Rating | All # (%) | Rating | All # (%) |
| Adequate (Yes) | 20 (35) | Pass PIP | 52 (90) |
| Inadequate (No/Somewhat or With Difficulty) | 38 (65) | Fail PIP | 6 (10) |
| TOTAL (% of All) | 58 (100) | TOTAL (% All) | 58 (100) |

- To evaluate program effectiveness, data were compared for the 58 participants who both submitted records for the Pre-Seminar Review and completed PIP from March 2013 to September 2016.
- On Pre-Seminar Review, only 35% (20/58) received an adequate rating.
- Approximately 90% passed the follow-up program, demonstrating adequate overall documentation.

This represented a notable improvement (160% increase in overall adequacy of records)

Key Points

- EMRs are not the panacea for documentation deficiencies
- Seminar is a CME course
 - Chart submission is not required; participants select the charts they submit
 - CPEP does not typically review background information about the participant
- Seminar is *not* designed to assess or provide feedback on quality of care
- Are your concerns about a specific type of documentation?
 - *For example, inpatient or procedural-related documentation? CS prescribing?*

Let us know and we will work with the participant to incorporate your requests
- Change is a process, not an event; consider requiring PIP after the seminar
 - Participants may benefit from ongoing feedback to implement what they have learned