

## **Ambulatory Clinical Documentation Improvement (aCDI) Toolkit** **for** **Primary Care**

This toolkit is designed to provide a standard set of strategies and tools specific to help you improve care provided in the ambulatory environment. The toolkit has a three tiered approach that we believe provides a foundation for improvement work resulting in effective adoption and sustainability. These elements include:

1. **Infrastructure**: this first section focuses on the role of the care team and highlights how to prepare for upcoming appointments, optimize the role of team members, address equipment needs or medical record needs as well as how to regularly monitor your results;
2. **Competencies**: this section identifies what trainings are available to build clinical and content knowledge for all members of the care team and the patient population. Whenever possible hyperlinks to web based handouts, tools or webinars are included.
3. **Additional Resources**: We recognize that every team has different needs, and there are many resources available to browse and utilize as you see fit.

### **Need help implementing this Toolkit?**

The MaineHealth ACO Improvement team can assist you with strategies and workflows in support of ACO initiatives.

To learn more about what toolkits and Best Practice Frameworks are available or for improvement support please email us at



**contactmhaco@mmc.org**

and you will be connected with our aCDI Team!

# ***Ambulatory Clinical Documentation Improvement (aCDI)***

## **1. Infrastructure:**



### **❑ Pre-Visit Planning/Huddle**

-  Pre-visit check list
-  Example of huddle tool



### **❑ Define Care Team Roles**

-  Sample workflow

### **❑ EMR Tool / Documentation Tools**

-  HCC Reference Guides & “Cheat Sheets”
-  EPIC BPA enhancements (if applicable)

### **❑ Regularly Measure Results (Sustainability)**

-  HCC / Coding Gap Reports (via Arcadia or EPIC)
-  KPI examples for performance improvement

# Huddle Sheet

- What can we proactively anticipate and plan for in our work day/week? At the beginning of the day, hold a review of the day, review of the coming week and review of the next week. Frequency of daily review is dependent on the situation, but a mid-day review is also helpful.
- This worksheet can be modified to add more detail to the content and purpose of the huddles.

## Huddle Sheet

Practice: \_\_\_\_\_

Date: \_\_\_\_\_

**Aim:** Enable the practice to proactively anticipate and plan actions based on patient need and available resources, and contingency planning.

### Follow-ups from Yesterday

**“Heads up” for Today: (include review for orders, labs, etc.; special patient needs, sick calls, staff flexibility, contingency plans)**

Meetings:

Opportunity to  
note  
‘coding gaps’  
here

### Review of Tomorrow and Proactive Planning

Meetings:

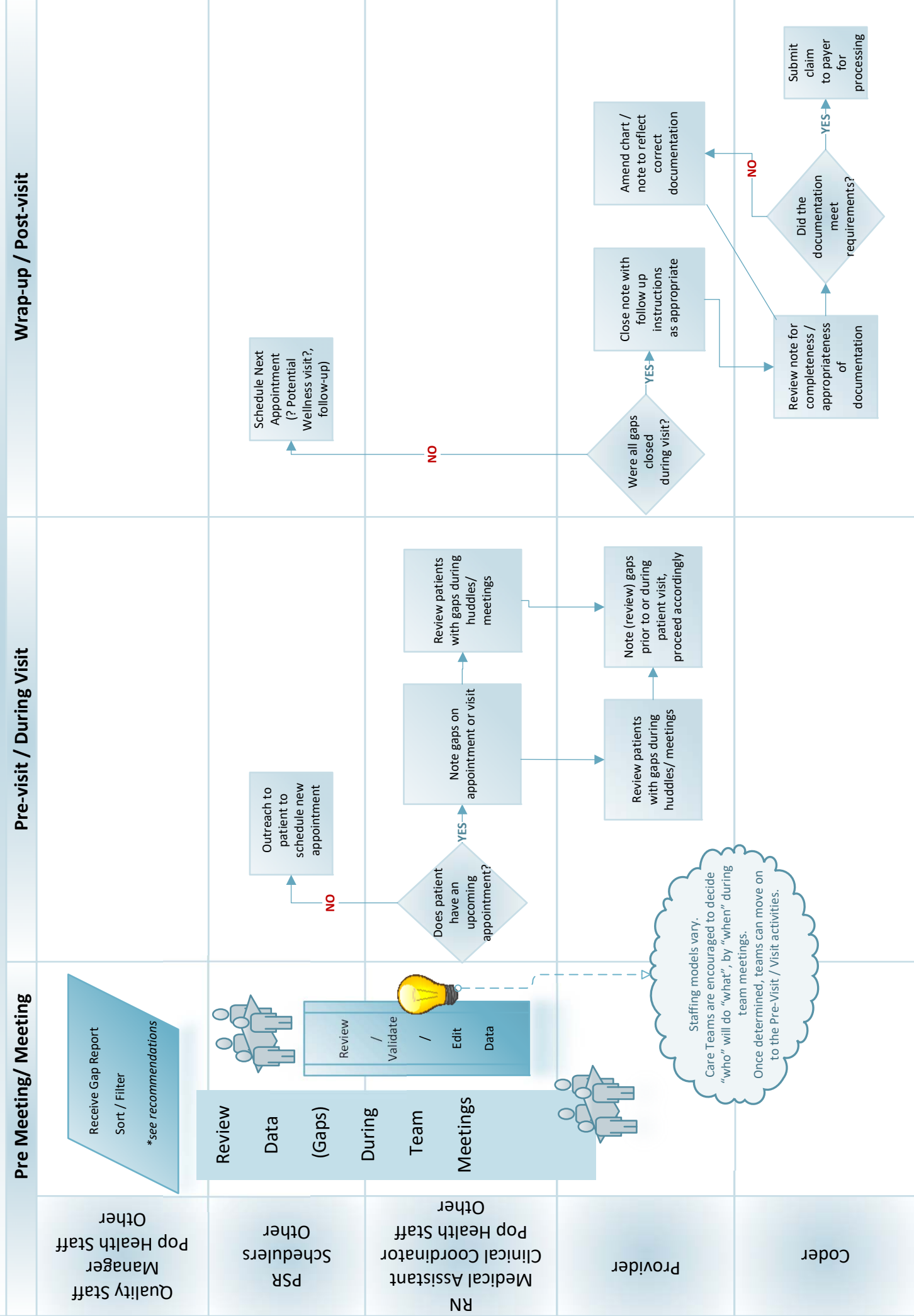
Opportunity to  
note  
‘coding gaps’  
here

# Pre-Visit Planning Checklist

Patient: \_\_\_\_\_ Reason for Appt: \_\_\_\_\_ Appt Time: \_\_\_\_\_





<p><b>Adult Prevention:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> BMI (ht &amp; wt)</li> <li><input type="checkbox"/> Blood Pressure (if &gt;140/90) pull last 3 BP</li> <li><input type="checkbox"/> Falls Risk (65+)</li> <li><input type="checkbox"/> Pneumococcal</li> <li><input type="checkbox"/> Flu Shot</li> <li><input type="checkbox"/> Tdap</li> <li><input type="checkbox"/> Tobacco Use/Counsel/Referral to MTHL</li> <li><input type="checkbox"/> Depression Screen</li> <li><input type="checkbox"/> Pap Smear</li> <li><input type="checkbox"/> DEXA Scan</li> <li><input type="checkbox"/> Colon Cancer Screen (50-75)</li> <li><input type="checkbox"/> Breast Cancer Screen (50-75)</li> <li><input type="checkbox"/> Outside Reports / Tests</li> <li><input type="checkbox"/> Advance Directive</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p>	<p><b>Diabetic:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> HgbA1c</li> <li><input type="checkbox"/> Tobacco Use/Counsel/Referral to MTHL</li> <li><input type="checkbox"/> Micro albumin</li> <li><input type="checkbox"/> Outside Reports / Tests</li> <li><input type="checkbox"/> Eye Exam</li> <li><input type="checkbox"/> Foot Exam</li> <li><input type="checkbox"/> Depression Screen</li> <li><input type="checkbox"/> LDL</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p> <p style="text-align: right;"><i>Also review Preventive Care Gaps!</i></p>
<p><b>Cardiovascular Disease:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Blood Pressure</li> <li><input type="checkbox"/> IVD / Aspirin</li> <li><input type="checkbox"/> HTN</li> <li><input type="checkbox"/> HF / Beta Blocker</li> <li><input type="checkbox"/> LDL</li> <li><input type="checkbox"/> Outside Reports / Tests</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p> <p style="text-align: right;"><i>Also review Preventive Care Gaps!</i></p>	<p><b>Controlled Substance:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Controlled Substance Agreement</li> <li><input type="checkbox"/> UTOX</li> <li><input type="checkbox"/> PMP</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p>
<p><b>Pediatric Prevention:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> BMI (ht &amp; wt)</li> <li><input type="checkbox"/> 5-2-1-0</li> <li><input type="checkbox"/> Immunizations</li> <li><input type="checkbox"/> Tobacco Use/Exposure/Counsel/Referral to MTHL</li> <li><input type="checkbox"/> Blood Pressure</li> <li><input type="checkbox"/> Depression Screening</li> <li><input type="checkbox"/> MCHAT/ASQ</li> <li><input type="checkbox"/> Outside Reports / Tests</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p>	<p><b>Pediatric Asthma:</b> <i>Gap(s) in Care or Due Soon:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Severity</li> <li><input type="checkbox"/> Controller Med</li> <li><input type="checkbox"/> Action Plan</li> <li><input type="checkbox"/> Lung Function Test</li> <li><input type="checkbox"/> Tobacco Use/Counsel/Referral to MTHL</li> <li><input type="checkbox"/> ACT</li> <li><input type="checkbox"/> Outside Reports / Tests</li> <li><input type="checkbox"/> BMI (ht &amp; wt)</li> <li><input type="checkbox"/> Outstanding Testing</li> <li><input type="checkbox"/> Hospital Admissions/ED Visits</li> </ul> <p>NOTES: <i>current coding gaps?</i></p>
<p><b>Room Set Up Needs/General Notes:</b></p>	

# aCDI / HCC Coding Gaps - Primary Care Workflow



## KPI Example:

# Measure and Celebrate Success

Project Description:			Overall Progress:
Accurately represent the complexity of our patients			
Project Milestones			
Milestone	Measures of Success	Date Due	% Complete
	Utilize EPIC HCC Tools during patient charting	4/25/2020	
	Work HCC Gap Reports with Staff and Providers	4/25/2020	
	Optimize Patient Problem Lists	4/25/2020	

### Don't forget to celebrate!

- Celebrate your hard work
- Celebrate improved patient care and experience
- Celebrate increased reimbursement

## 2. Clinical Competencies:

### ☐ Provider

 Training: Three Simple Ways to Improve Clinical Documentation

<https://mainehealthaco.org/CDI>

 Care Team Roles – Provider

<https://mainehealth.org/-/media/elder-services/awv/rolesteambasedcaremodel.pdf?la=en>

### ☐ Staff

 aCDI Webinars and Training:

<https://mainehealthaco.org/CDI> ("Clinical Documentation Improvement" section)

 The Impact of Documentation on Patient Care  
(contact MHACO Improvement Advisor to schedule)

### ☐ Build Staff Training Into Annual Competencies / Staff Orientation

## 2. Additional Resources:

- ✓ Coding Cards for Primary and Specialty Care  
*(for the most up-to-date ICD10 codes and guidelines, always refer to your latest ICD10 Coding book)*
- ✓ Documentation Quick Guide: “MEAT” and “LOST”  
*Found on each Coding Card, and provide knowledge around what meets coding and documentation guidelines*
- ✓ Top 10 Coding Conditions - opportunities for high impact improvement
- ✓ Coding Cards for Primary and Specialty Care  
*(for the most up-to-date ICD10 codes and guidelines, always refer to your latest ICD10 Coding book)*
- ✓ Recommendations for Filtering / sorting Gap Reports  
*(contact your MHACO Improvement Advisor)*
- ✓ AAFP Article - "Its Time To Go Rafting" (Adler, Kenneth MD. Fam Pract Manag. 2018 Mar-Apr;25(2):5.  
<https://www.aafp.org/fpm/2018/0300/p5.html>



# MHACO Top 10 Conditions\*\*

Some of the top Hierarchical conditions (HCC\*) weighted by prevalence that is suggested to focus on could include:

1. DM with Comp	6. Rheumatoid Arthritis
2. Specified Heart Arrhythmias	7. Major Depression
3. COPD	8. Metastatic Cancers
4. Vascular Disease	9. Morbid Obesity
5. CHF	10. Amputations

\*HCC - Hierarchical Condition Categories, CMS identified 79 Categories of medical conditions that map to a corresponding group of 9,500 ICD-10 diagnosis codes, pertains to ambulatory care and inpatient care.

\*\* National Association of ACOs (NAACOS) suggest focusing on top 9 HCCs by weighted prevalence- MHACO has been following these HCCs and have added amputations.