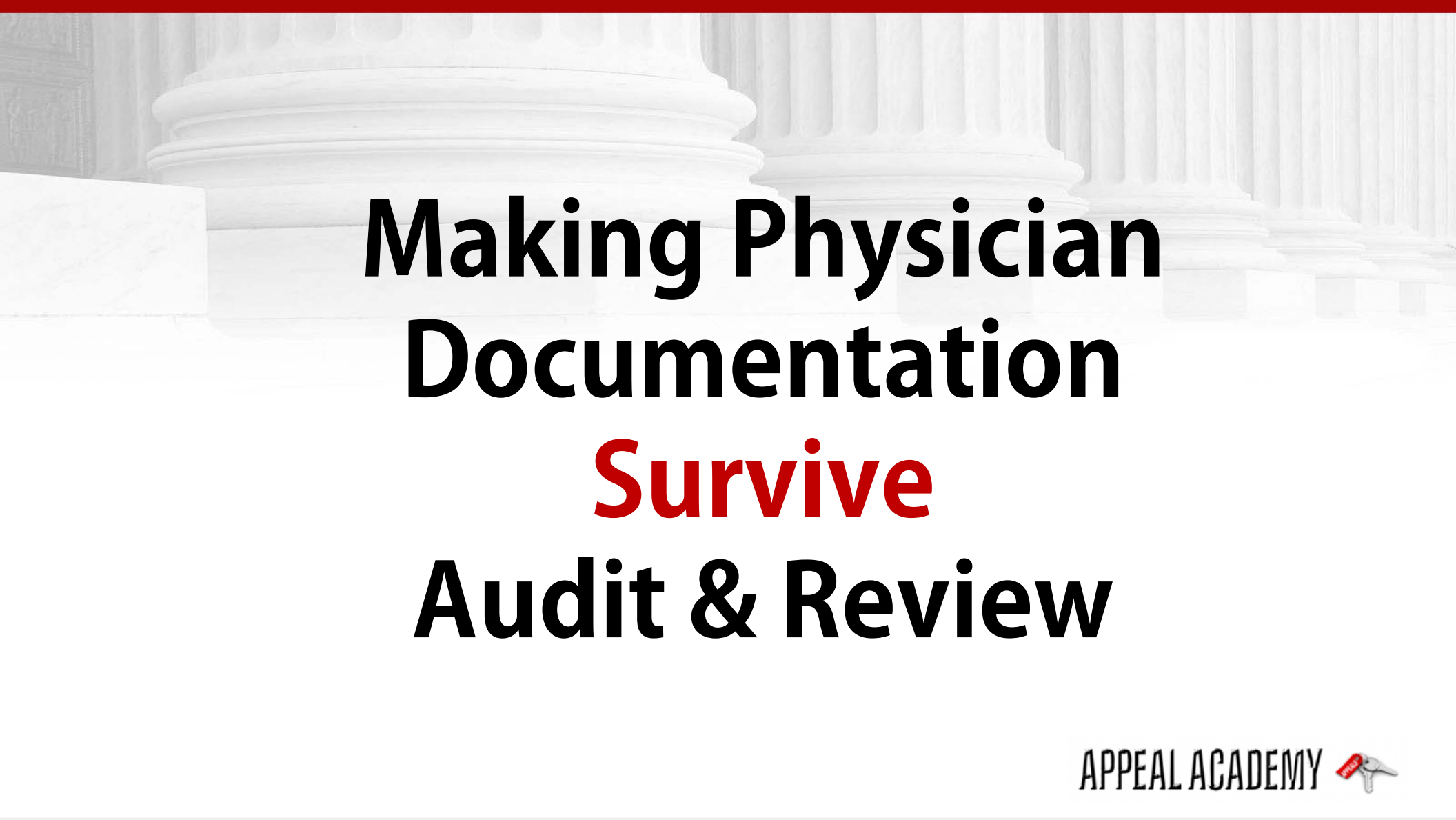# Documentation to Avoid Denials

The Search for A Methodology Physicians Can Accept

APPEAL ACADEMY
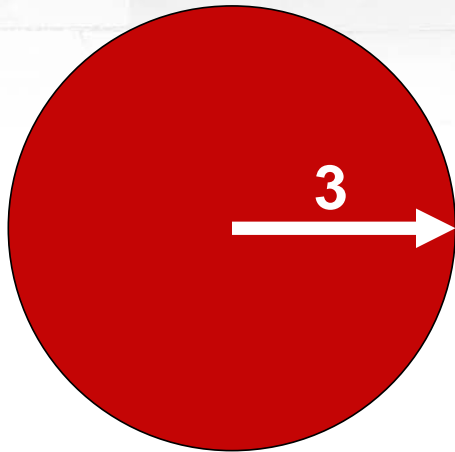
SAVING HEALTHCARE…
ONE APPEAL AT A TIME

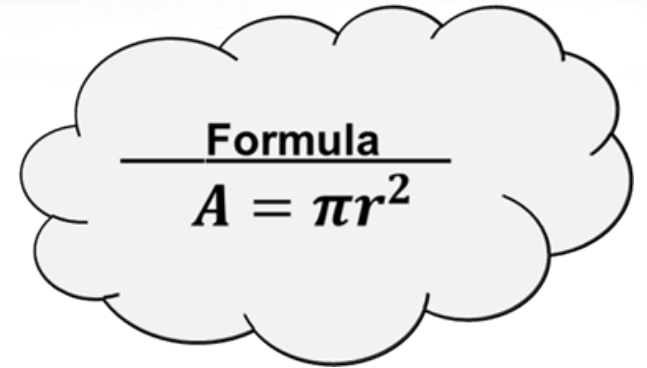# Making Physician Documentation **Survive** Audit & Review

APPEAL ACADEMY

How We Solve Problems...

Find the Area of the Circle.

Conclusion:
9π

Known:
Radius of Circle = 3

And you know the formula because you took Geometry.

Formula
$$A = \pi r^2$$

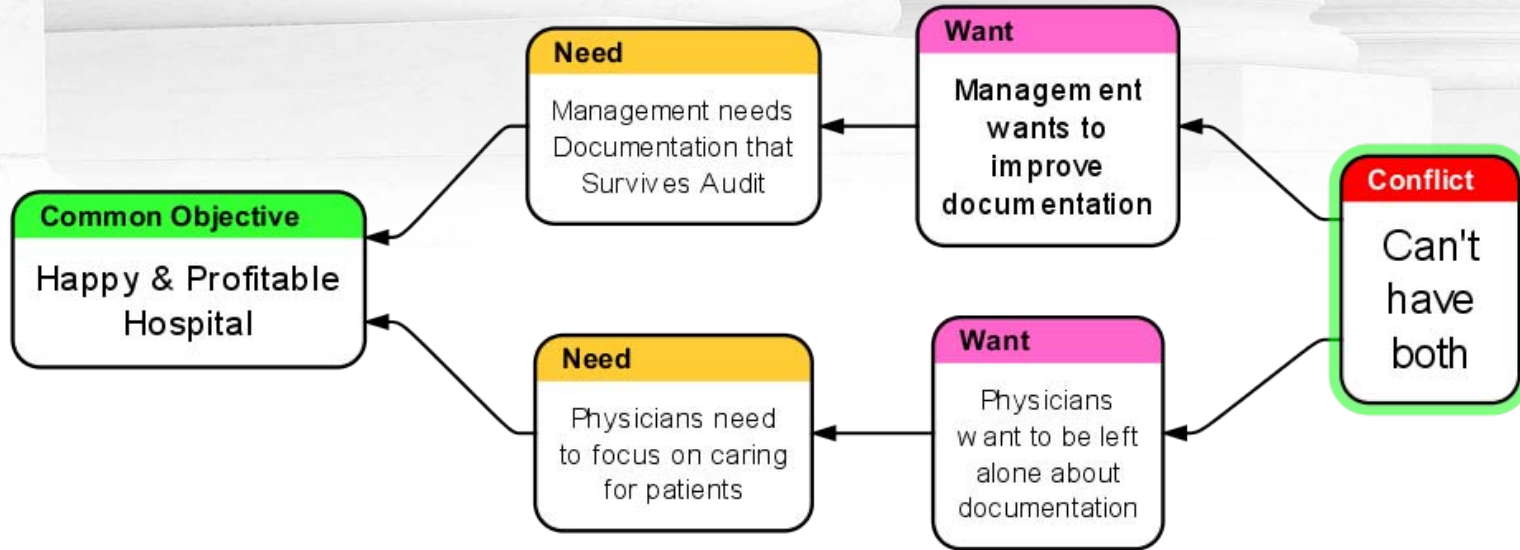This is how you get the answer.

APPEAL ACADEMY

Why do we still get denials?

Two Reasons:

1. We've yet to attack or solve the Core Problem

2. There is a basic conflict between stakeholders

Example of a Conflict Cloud, adapted from *Thinking for a Change: Putting the TOC Thinking Processes to Use* by Lisa J. Scheinkopf

APPEAL ACADEMY

Complete Example of a Current Reality Tree, adapted from *Thinking for a Change: Putting the TOC Thinking Processes to Use* by Lisa J. Scheinkopf
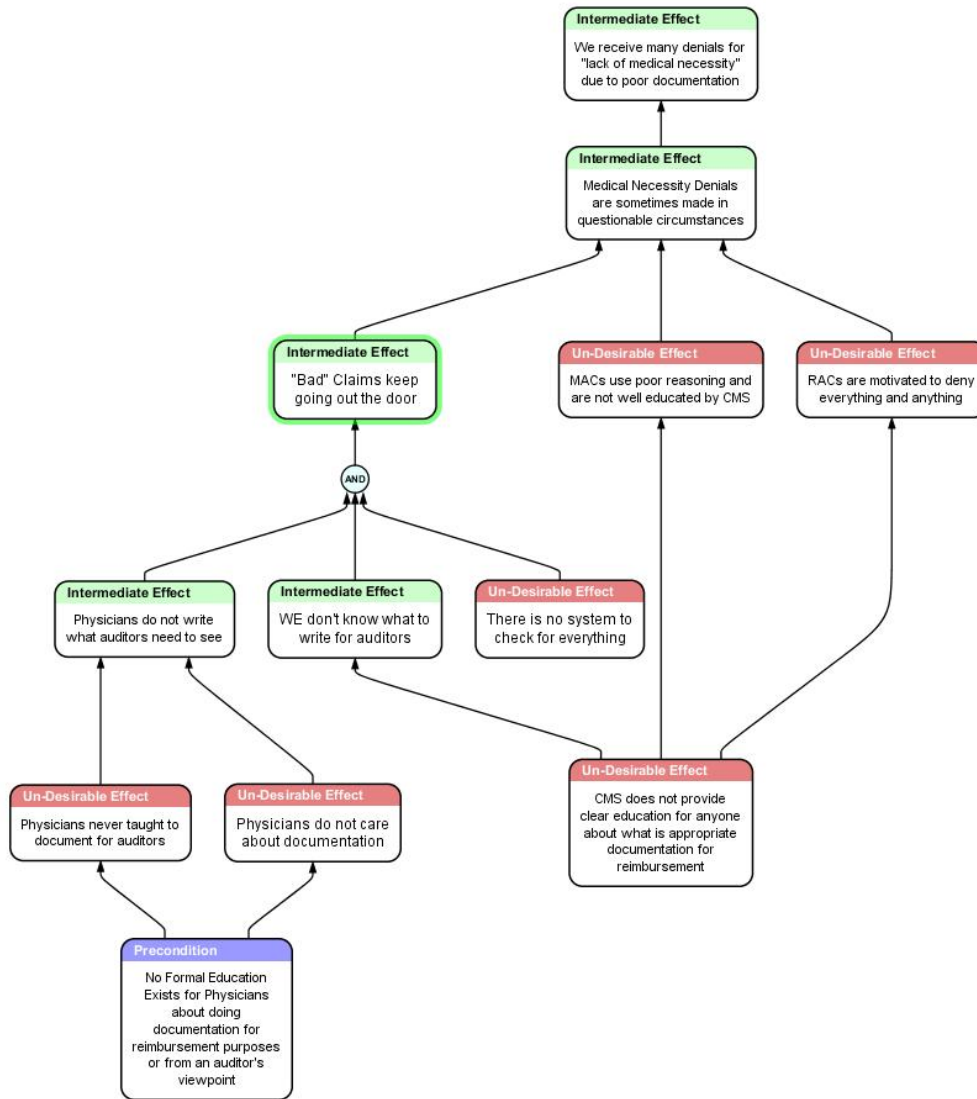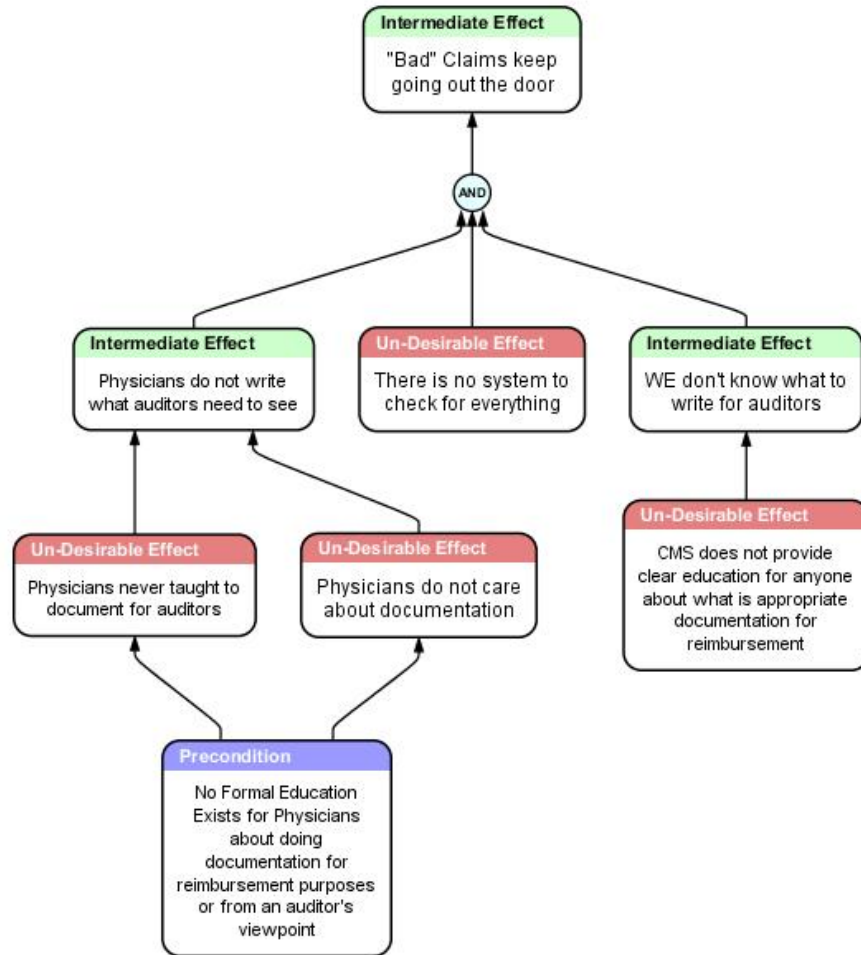
Partial Example of a Current Reality Tree, adapted from *Thinking for a Change: Putting the TOC Thinking Processes to Use* by Lisa J. Scheinkopf

So What Is The Core Problem?
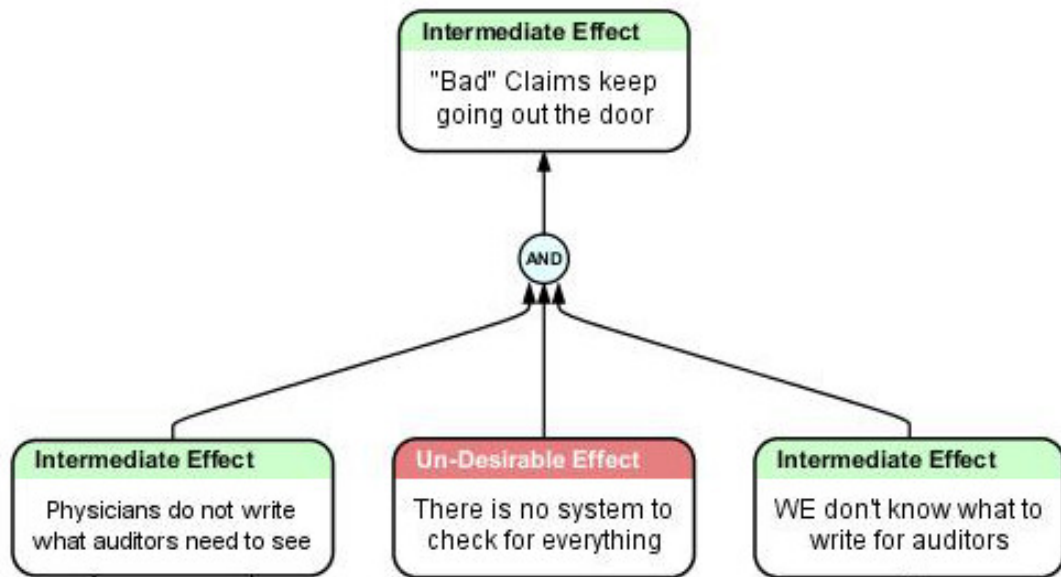
✓ **Auditors/Reviewers are not Physicians, cannot INFER**

✓ **Physicians write for Physicians, expect them to INFER**

✓ **Providers have no way to affect the Auditors**

✓ **We must find a way to change the Documentation**

Now we can look for a Direction of a Solution...

APPEAL ACADEMY

What Obstacles Must Be Overcome?

(must list them, to later check for sufficiency of the solution)

- ✓ Denials are inconsistent, seem difficult to predict
- ✓ It's a burden to document even more
- ✓ "*I don't need something more to memorize*"
- ✓ "*I don't know what I don't know*"
- ✓ Not motivated to document for audit/review
- ✓ "*Tell me how you'll measure me, and I'll tell you how I'll perform*"

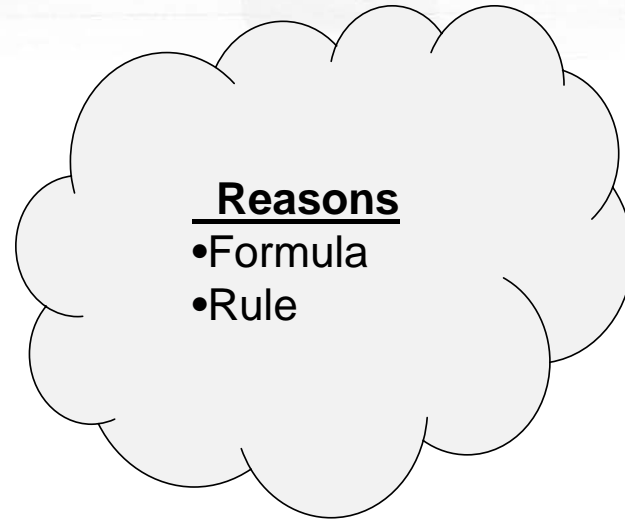| OBSTACLES	INTERMEDIATE GOALS	ACTIONS
Burden	Easier method, so not a burden.	Have the new system down COLD.
What & How?	Simple method that works, is easy to understand, and know WHY it works.	Teach them WHY it works, with examples.
Little Time	Training will take perhaps 2 hours total.	Use 15-30 minute weekly training 4 times, for small groups or individuals.
Memorization	No memorization needed - and a cheat-sheet exists, pocket size.	System must be simple, easy to remember WHY, and a small laminated card is provided as a help.
Motivation	Easy method, expected to allow LESS time spent on physician documentation.	Test in training sessions, show them how easy and fast it is, then measure before, during and after the program begins. Meausrements must include global as well as local optima.
Unclear	"Rounding" meeting, on a monthly basis to analyze results & issue course corrections, if needed.	Monthly short meetings to be set, either for small groups or individually, for the purpose of reviewing results and the method if needed, and offering any needed changes, etc.

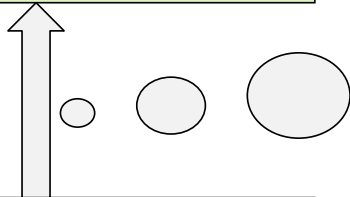# Defining a Possible Direction of a Solution

- Identify Obstacles
- Set Intermediate Goals
- Define Actions to reach those
- Check Logic & Sufficiency

APPEAL ACADEMY

Requirements For A New Method

- ✓ **Must provide what auditors are looking for**

- ✓ **Must work for every DRG**

- ✓ **Must work for any DRG**

- ✓ **Must be easily learned & understood**

- ✓ **Must be adaptable to new regulations**

- ✓ **Must allow for outside local assistance & advice**

APPEAL ACADEMY

Teaching with A New Method

... Adapted from Theory of Constraints for Education

Know Something New
- Conclusion
- New Knowledge

Reasons
- Formula
- Rule

Some Givens
- Definition
- Number
- Condition

APPEAL ACADEMY

A Clinical Example

Admitting Diagnosis Dx

Known: presenting symptoms

More Data
tests, labs, & observations

Question: Why do those presenting symptoms mean Dx?

ANSWER

Question: If you know those symptoms, how did you arrive at Dx ?

APPEAL ACADEMY
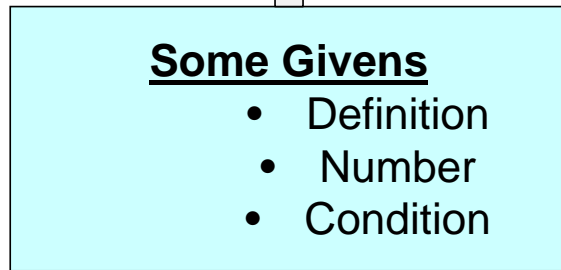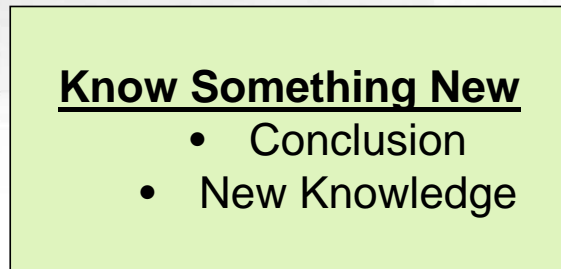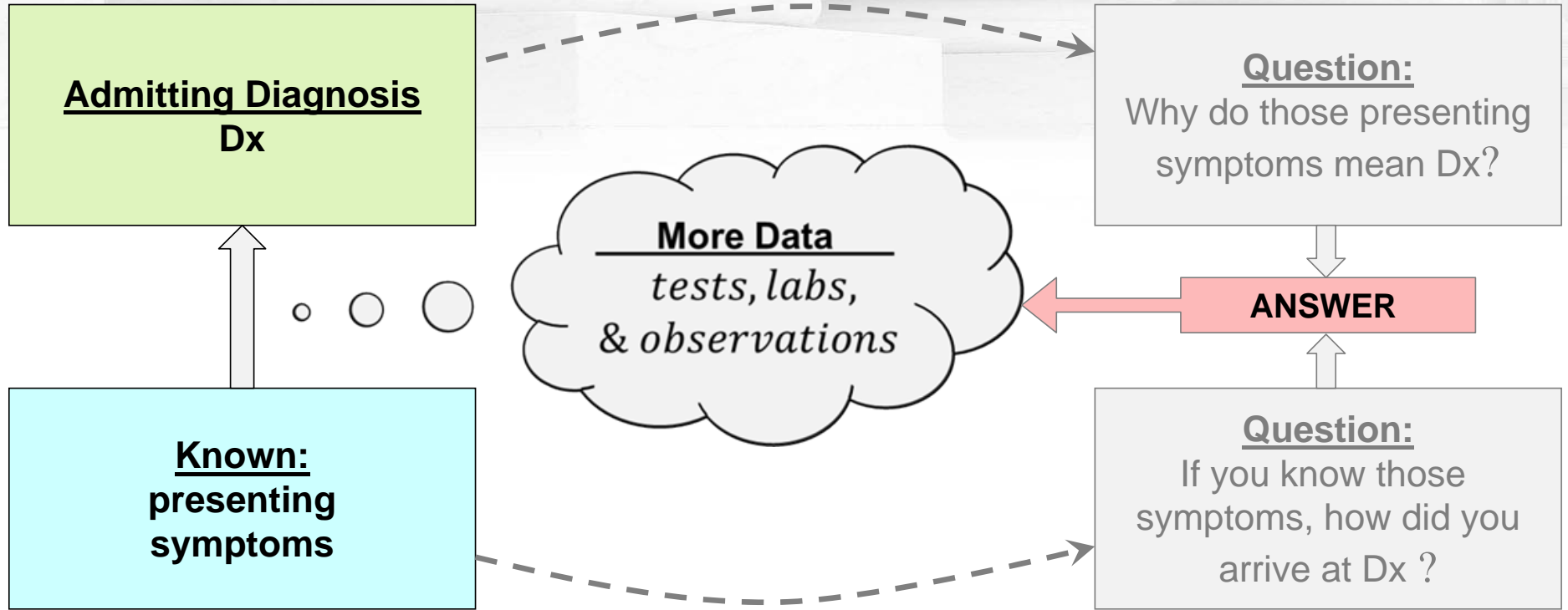
A Documentation Example

Survived Audit
Medical Necessity was supported

New Method
Provides what a Nurse Auditor wants to see

Known:
Physician Documentation

Question:
WHY did this documentation survive the audit/review?

ANSWER

Question:
HOW does this documentation support medical necessity for audit?

APPEAL ACADEMY
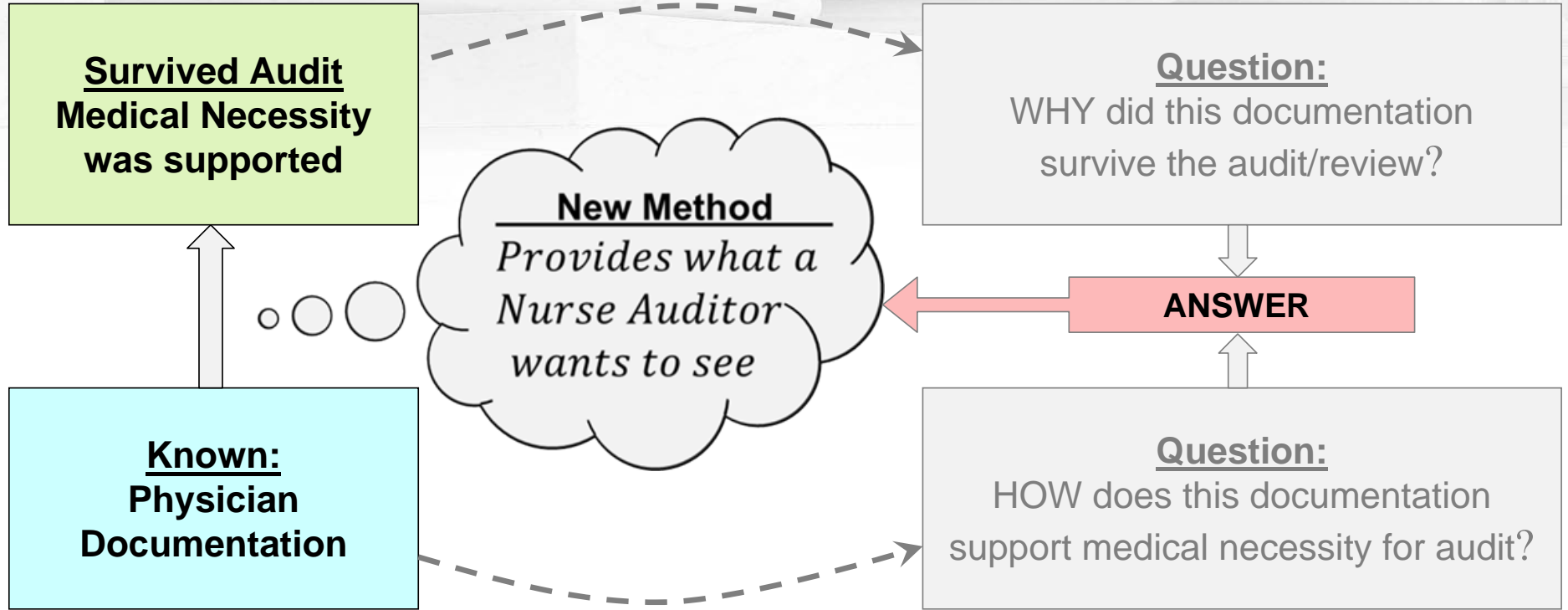
What Is A Physician's Motivation to Do This?
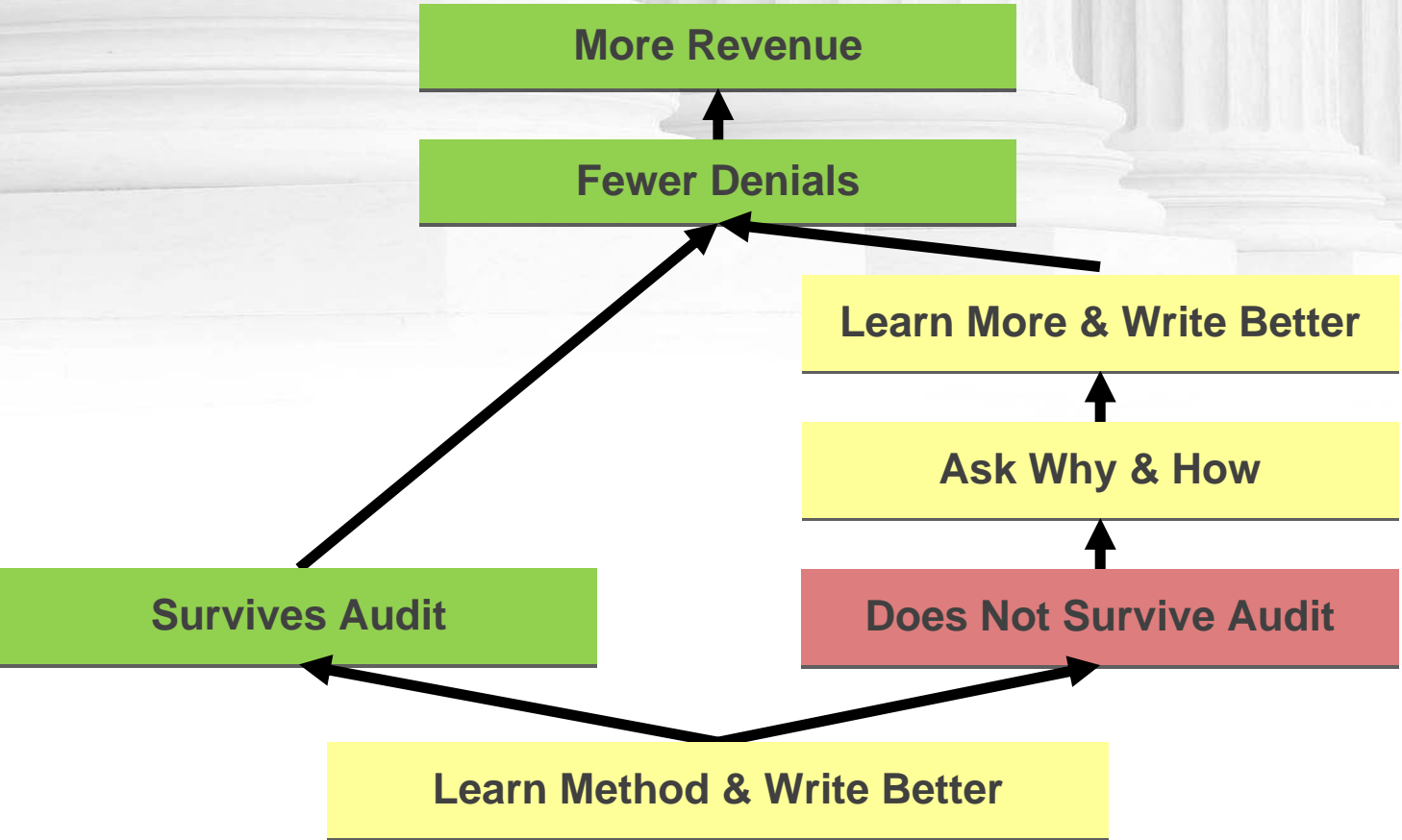
Why do this at all?
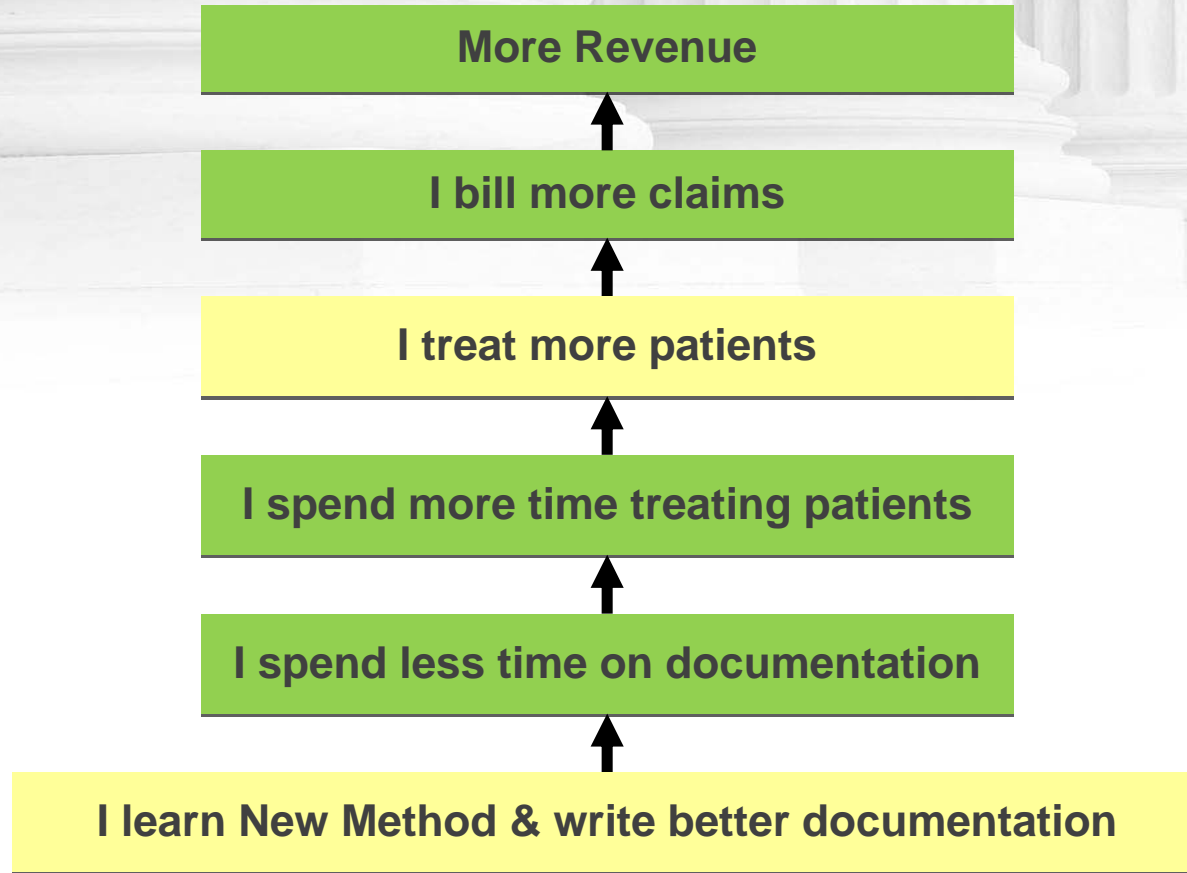
- *Is it necessary to do this to be a "better doctor"?*

Can this somehow be used to <u>incentivize</u> physicians to pay attention to what we are suggesting?

APPEAL ACADEMY

A Glimpse Into A "Future Reality"

More Revenue

Fewer Denials

Learn More & Write Better

Ask Why & How

Survives Audit

Does Not Survive Audit

Learn Method & Write Better

APPEAL ACADEMY

… WHAT IF the New Method allowed for LESS TIME spent documenting?

More Revenue

↑

I bill more claims

↑

I treat more patients

↑

I spend more time treating patients

↑

I spend less time on documentation

↑

I learn New Method & write better documentation

APPEAL ACADEMY

Review What We Covered

✓ **We identified the problem: Documentation**

- *Need to write documentation for auditors*

✓ **We defined the Direction of a Solution**

- *Objections must be overcome with our defined actions*

✓ **We defined how to affect the changes**

- *New Method must be easy to use & understand*
- *New Method can motivate them to change behavior*

APPEAL ACADEMY

Now for the Best News...

We know a New Method that fits the bill.