Developing Education and Training .......
It’s Not a Crap Shoot

HCCA
Compliance Institute
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Director, Healthcare Industries
Today’s Discussion

- Discuss how to identify and prioritize learning objectives
- Provide strategies on how to develop curriculum
- Review common obstacles and mistakes
- Questions/Answers

Establish a Game Plan

Don’t be afraid of change
Tailoring Message to Audience

- Who are the participants?
  - Medical Students
  - Residents
  - Physicians
  - Ancillary Staff
  - Coders/Billers
  - HIM Professionals
  - Business Office
  - Administration
  - Management

What’s in it for ME?

Understanding the Message

- What do you hope to accomplish with the training?
  - Inform and create awareness
  - Change behavior
- Why is it important?
  - How should the sessions be structured?
  - What will the organization achieve?
- Group education versus individualized training:
  - Classroom (didactic)
  - One-on-one sessions
  - Shadowing physicians
  - Computer Based Learning (CBL) modules

“Seek first to understand before you can be understood”—Stephen Covey
Establishing Learning Objectives

- What do you want the participants to walk away with?
  - Reference Materials
  - Tools/Pocket Cards
  - Knowledge & Confidence
- Develop learning objectives that are measurable
  - Provide an awareness of ....
  - Understand policy/procedure....
  - Become proficient in.........
  - Recall the documentation requirements...
  - Select the appropriate CPT code(s).................

Developing Training Curriculum

- Determine what is most helpful to the participant
  - Solicit input from participants
  - Copy of Presentation Material
  - Tools or Pocket Cards
  - Case example Discussion
  - Study group exercises
  - Other
Developing Training Curriculum

- Create an outline of information to be included
- Establish session duration (45 minutes, 1 hour)
- Review outline – scale back information to allotted time
- Modify flow and content to tie back to learning objectives
- Incorporate tools:
  - Case examples, job aides, forms, policies/procedures, exercises, etc.

Use Case Examples
Use Your Tools - CMS 1500 Claim Form

Tools – Sample Medicare Bell Curve Analysis

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Tools - CMS Top 200 Level I (HCPCS/CPT Codes)
Physician/Supplier Data Calendar Year 2002

Tools - Medicare Fee Schedule 2004

2004 National Physician Fee Schedule Relative Value File
CPT codes and descriptions only are copyright 2003 American Medical Association. All Rights Reserved. Applicable FARS/DFARS Apply.
Dental codes (D codes) are copyright 2002 American Dental Association. All Rights Reserved.
REVISED 1/14/2004

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Tools - Sample Outpatient Encounter Form

Provides a mechanism to sequence up to 4 diagnosis codes

Common Obstacles/Mistakes

- Using either an unqualified and/or inexperienced instructor
- Not “teeing” the session up appropriately at the get-go
  - Need to set expectations, address materials, question/answer format, etc.
- Not allowing adequate time between sessions
- Scheduling too many sessions in one day
- Too much information to be covered in allotted time
- Information basic or to complex
- Not addressing each style of learning
Relating to the Adult Learner

- Keep in mind that people learn differently
  - Audio, Visual, Kinetic
- Include graphs, tables, exercises, group discussions, skits, etc.
- Don’t include so much in your agenda that you lose your message and the participants attention
- Provide the information in “sound bytes”
- Check for remediation

Selecting the Instructor

- Who can portray the message in a clear, concise and confident manner?
  - Technical experience
    - Generalist or Specialist
  - Teaching experience
  - Public speaking experience
    - Small groups/department meetings
    - Large groups
    - Formal sessions
- Critique past evaluations, audio and videotapes
Scheduling and Logistical Considerations

- Schedule sessions at times that will be the less disruptive to the physicians clinical schedule
- Schedule multiple sessions of the same type (e.g., Internal Medicine) at different times/days
- Utilize department standing meeting times
- Schedule the room for more time than the actual session
- Do not overbook the instructor
- Check the room set-up in advance
- Arrange for audiovisual equipment and technical support

Evaluating Performance and Comprehension

- Instructor Performance
  - Did the instructor relay the information in a clear and concise manner?
  - Were the materials effective in illustrating key learning objectives?
  - Did the attendee gain confidence in the subject?

- Attendee Comprehension
  - Can the participant apply what they learned?
  - Was a pre and post session assessment used?
  - Did post education testing occur?
Sample Evaluation Form

Select one answer for each of the following questions

1. Please rate your understanding of the following:
   - Diagnosis Coding Concepts
   - E&M Coding Concepts
   - Use of Medical Decision Making Tool
   - Use of Progress Note
   - Use of Pocket Card

<table>
<thead>
<tr>
<th>Proficient</th>
<th>Understand</th>
<th>Need additional help</th>
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<tbody>
<tr>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

2. Please rate the following:
   - Overall Presentation
   - Flow of Presentation
   - Speaker’s Effectiveness
   - Quality of Handout Material

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Poor</th>
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<tbody>
<tr>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

3. Please rate the usefulness of the following:
   - Case Study Workbook
   - Pocket Guide

<table>
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<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>O</td>
<td>O</td>
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</table>

1. Was the session length adequate?
2. Were your expectations met?
3. Did you attend an introductory session prior to this training?

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Analyzing Evaluation Data/Results

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<tr>
<th>Overall Presentation</th>
<th>Flow of Presentation</th>
<th>Speaker’s Effectiveness</th>
<th>Quality of Handout Material</th>
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<tr>
<td>78.0%</td>
<td>75.8%</td>
<td>79.2%</td>
<td>80.6%</td>
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<td>20.9%</td>
<td>23.2%</td>
<td>19.7%</td>
<td>17.3%</td>
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Analyzing Evaluation Data – Determining Next Steps

E&M Coding

<table>
<thead>
<tr>
<th>Proficient Understand</th>
<th>Some understanding</th>
<th>Need additional help</th>
<th>No response</th>
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<td>57.5%</td>
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<td>No</td>
<td>32.6%</td>
<td>64.8%</td>
<td>2.6%</td>
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Conduct Post-Education Assessments

By Leigh Rubin

Rubes®

Quite suddenly and without warning, Herb fell victim to the old adage, “If you don’t use it, you lose it.”
Keys to Success

- Planning
- Perseverance
- Dedication
- Compassion
- Enthusiasm
- Commitment

In Conclusion

- Gain internal support
- Identify and involve key stakeholders
- Define learning objectives
- Allow adequate time for up-front planning
- Prepare meaningful materials
- Provide reference tools
- Conduct post-education reviews

“I am always ready to learn although I do not always like to be taught”
—Winston Churchill
“Never let them see you SWEAT”

References

- DiResta, Diana. Knockout Presentations, How to Deliver Your Message with Power, Punch and Pizzazz.
- http:www.oig.gov.hhs
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- Jeary, Tony. Inspire Any Audience.
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