

## Education Committee Draft Meeting Report

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### Summary

During the 2009 WHO-FIC Network Annual Meeting in Seoul, Republic of Korea, the Education Committee (EC) held two working sessions, on Monday, October 12 and Wednesday, October 14. This Meeting Report provides a combined summary of both working sessions, which each were attended by approximately 40 persons. The participants represented five WHO Regions and at least 10 Collaborating Centers designated and under designation. The Committee also benefited from the participation of several representatives from WHO Headquarters and Regional Offices

In the first working session, the EC Status Report was presented and the Terms of Reference were confirmed with a new task on maintenance of self-learning tools. The ICD-10 Web-based Training Tool was launched, and the plan for its finalization was established. The International Exam for Underlying Cause-of-death Coders, translated to Spanish, was piloted in Mexico and the preliminary results were presented. The Survey on the need for an International Exam for Morbidity Coders was presented, and the further development of this topic was discussed. The three Information Sheets: *Training and Certification to Promote High-Quality Data*; *What You Should Know about Clinical Documentation*; and *Uses of Coded Clinical Data* were presented and approved. Two others are being prepared. The proposal for a Briefing kit for the Collaborating Centers was presented and approved. In this session the Health Information System of Sri Lanka was presented, and the results of the survey on the Status of Education on Health Information Management around the world were reported.

The second session reported on progress under the joint ICF Education Project with the Functioning and Disability Reference Group (FDRG). Version 1 of the ICF Curriculum Modules is posted at the EC website and available for translation. The ICF Overview, now in the 10<sup>th</sup> version, is to be finalized. The ICF e-learning tool and the processes for revision and comments were presented. The protocol for testing will be shared with the EC and FDRG in November 2009, and the test will be conducted from December 2009 to April 2010. Translation into other languages is planned.

Both sessions included presentations of papers and posters on best practices for ICD and ICF education in line with the Committee's aims to identify best practices and provide a network for sharing expertise and experience on ICD and ICF education and training.

The Education Committee maintains a list of abbreviations and acronyms on the EC website and a set of slides on the Network for orientation of new annual meeting attendees.

Since the 2008 Annual Meeting in Delhi, the EC and Joint Collaboration (JC) with the International Federation of Health Records Organizations (IFHRO) had conducted four international teleconferences and held a two-day meeting in Raleigh, North Carolina, USA on April 1-2, 2009. The collaborative relationship with IFHRO began in 2000 to develop the International Training and Certification Program for Mortality and Morbidity Coders.

### Welcome and Introductions

Marjorie Greenberg, co-chair of the Education Committee (EC), welcomed participants, especially those who are rejoining the group following illness. Other meeting chairs were Cassia Maria Buchalla, EC co-chair, and Sue Walker and Margaret Skurka, co-chairs of the Joint Collaboration (JC). Patricia Wood agreed to serve as rapporteur for the first session, and Margaret Skurka and Rita Scichilone served as rapporteurs for the second session.

## **Review of the agenda**

There was no change to the agenda. The first session started with an overview of the Education Committee and the report of activities during 2008-2009.

### *WHO-FIC Education Committee Overview*

A brief overview of the role and composition of the WHO-FIC Network Education Committee (EC) was provided by Cassia Buchalla (co-chair) including details of the:

- aims of the EC
- terms of reference; generic terms and ICD-specific and ICF-specific terms
- joint collaboration with the International Federation of Health Records Organizations (IFHRO)

### *WHO-FIC Education Committee: a Status Report, 2008-2009*

The status report 2008-2009 was presented by Cassia Buchalla and included a brief mention of the:

- four conference calls held throughout the year and one face-to-face meeting in April 2009
- briefing kit developed for WHO-FIC Network Collaborating Centers
- ICF curriculum modules posted on the EC website
- Information Sheets on classification topics drafted
- Review and development of e-Learning tools

## **Review Education Committee Terms of Reference**

The minor changes to the Terms of Reference identified and proposed were confirmed:

- to include “and maintain” to the function : “6..Develop, harmonize and maintain self-learning tools.”

The statement about a single Chair also will change. “Preferably there should be a single Chair to emphasize the integration of WHO-FIC implementation” changes to “The EC will have two persons as co-chairs, elected for two years.”

## **Updating Strategy and Work Plan**

A new structure for the Work Plan was decided at the WHO-FIC Network Council meeting. The WHO-FIC Network is working towards a more standard format that emphasizes year-end products rather than process. The Committees and Reference Groups worked to compress their respective work plans into one page, with a column for resources added to illustrate needs. Another column will be added for indicators of measurement of success. The format and

templates will undergo revision as needed. The Council Small Executive Group will review all work plans and develop a harmonized structure.

The Committee refined the 2009-2010 work plan grid, and it was peer reviewed by two members of the Committee, Yukiko Yokobori and Jennifer Jelsma. The reviewers proposed changes in order to facilitate the achievement of the EC goals. A new version of the EC work plan was proposed, discussed and approved.

## Papers and Posters

The EC submitted eleven (11) papers and three (3) posters for the WHO-FIC meeting – they all are posted at the meeting website

<http://www.who.int/classifications/network/meeting2009/en/index.html>

### Papers

1. WHO-FIC Education Committee: A Status Report, 2008-2009 by Cassia Maria Buchalla and Marjorie S. Greenberg
2. Maintenance of the ICD-10 training tool and User Assistance by Robert Jakob, Cassia Buchalla, Marjorie Greenberg, Margaret Skurka and Sue Walker
3. Exploration of an International Morbidity Coding Examination: Survey results and proposed next steps by Joon H. Hong
4. WHO-FIC Information Sheets: An educational tool for global users by Cassia Maria Buchalla, Marjorie S. Greenberg, Marci MacDonald, Margaret Skurka, Christine Sweeting and Stefanie Weber
5. Preparation Activities for Implementation of ICD-10-CM in the United States by Rita Scichilone, Donnamaria Pickett, Sue Bowman, and Margaret Skurka
6. Current Status of Education on Health Information Management around the World by Yukiko Yokobori, Toshio Oi and Shuzo Yamamoto (paper and poster)
7. The relationship between Medical Record Documentation and Clinical Coding by Sue Walker and Lorraine Nicholson
8. Methods for Developing Your Own Instructional Podcasts about the ICF by John Hough (PowerPoint presentation and podcast)
9. The impact of teaching physiotherapy students the ICF as a framework for managing children with neurological conditions on the quality of patient assessment by Jennifer Jelsma and Des Scott
10. ICF Overview by Ros Madden and Catherine Sykes
11. Briefing Kit for Collaborating Centres by Marjorie S. Greenberg and Cassia Maria Buchalla

### Posters

1. Current Status of Education on Health Information Management around the World by Yukiko Yokobori, Toshio Oi and Shuzo Yamamoto
2. ICF eLearning Tool: a web- based approach of teaching ICF by ICF Research Branch of the WHO-FIC (DIMDI), the WHO Classification, Assessment, Surveys and Terminology Team, the EC and the FDRG.
3. Development of an On-line ICD-10 Course in Spanish by Luiz Manuel Torres and Patricia Soliz.

## **Electronic Training Tools**

### *Launch of ICD-10 Electronic Training Tool*

A presentation including a demonstration of the ICD-10 electronic training tool was made by Robert Jakob (WHO). It is expected that the tool will be officially launched in the end of 2009.

Robert discussed the paper submitted about the continuing role of the Education Committee in the future maintenance of the ICD-10 electronic training tool. The training tool will need to be maintained to keep it current. Also, because it is a self-learning tool, there must be somewhere users can go for help. Options were discussed in the paper, but most would require ongoing expert resources. Robert reviewed these with the participants, highlighting the pros and cons of each option.

Marjorie explained that, although this cannot be resolved today, the EC will need to consider the resources required for maintenance and support of the ICD-10 electronic training tool and decide what is feasible. Dr. Olafur Steinum offered the opinion that a help desk would be very difficult to manage and that perhaps a compilation of Frequently Asked Questions (FAQ's) might be the best first step. Marjorie agreed that this might be within our capacity. Dr. Enrique Loyola suggested that the work would be best shared among a group(s) of experts rather than done by one individual. Julie Rust pointed out that, either way, consistent and correct replies must be made. Further to that, Margaret Skurka agreed that the quality of the response must be excellent but that the quantity of questions is unknown at this time. Especially given the potential of multiple language versions and students, this may be beyond any volunteer base of expertise for supporting users of the tool.

Dr. Bedirhan Ustun mentioned the use of user-friendly social network approaches to building a knowledge base that would be fit for this purpose, such as the Google Wave. Robert cautioned against tying any forum to any one collaborating centre, citing the demise of the previous Mortality Forum. Rather, he suggested the social networking approach with a group of people offering answers. However, unlike the Mortality Forum, the aim would be to present one (agreed-upon) answer to questions posed about the training tool, not multiple answers.

Someone asked what people will get out of the tool. For example, will there be a completion certificate? Marjorie said that this is on the agenda of the Education Committee but that it needs to be considered carefully so as to produce something worthwhile. The current structure of the tool doesn't allow verification that a self-learner actually completed it. Marjorie concluded the discussion saying that interim and long-term decisions will need to be made.

### *Development of a web-based ICF training tool*

Alarcos Cieza (ICF Branch from the German Collaborating Center) presented the ICF e-Learning Tool: a web-based approach of teaching ICF. It is envisioned as a modular course structure: Introduction, Basic, Advanced and Specialized Modules. It is targeted to the four priority areas of ICF application: Clinical Practice, Statistics, Policy and Advocacy, Research and Education.

The work done to date on the Introduction module was described, as well as plans for work going forward. Alarcos demonstrated the navigation and the content. The first page of the tool includes learning objectives and overview of the modules content. There is a feedback window provided on each page of the course, which was used during the field testing period. A

structured feedback protocol was prepared, and the authors are asking ICD specialists as well as ICF experts to review the Introduction Module, which is ready. EC members reviewed the PowerPoint version of the module earlier in the year. Feedback is solicited about the content, navigation and suitability of this tool and appreciated by the authors. A general protocol for the field tests will be sent out in November 2009 to EC and FDRG members

Field tests will take place between January - April 2010; then a specialty review process would be introduced. The aim is to have the product presented at the WHO-FIC 2010 meeting. It should be possible for Alarcos to update the EC at the Committee's mid-year meeting in February 2010 in Cologne, Germany.

Sue Walker offered to provide a review of the product before April, and Margaret Skurka offered to have students, familiar with ICD, but unfamiliar with ICF, also do a field testing. Ros Madden indicated the tool has been discussed with the FDRG and that there are people at her University who could participate in the field testing as well.

There are plans to have the tool available in English, Spanish, Swedish and Portuguese. A question was asked concerning translation –Robert Jakob explained that the validation process by the developer requires 30 full time work days. A question was asked “which are the priority languages for translation”? At minimum, we would want the to make the tool available in the six official languages and the additional two regional languages (German and Portuguese) Marie Cuenot (French Collaborating Center) agreed in principle to help with the French translation. Marijke De Kleijn (Dutch Collaborating Center) indicated interest in Dutch translation, but the funding also will be a factor.

Tasks for Education Committee:

- Provide a list of reviewers along with the list of persons who could translate into different languages
- Help with identification of persons for the project groups to develop the additional modules

Alarcos also requested suggestions for good venues and events where the tool can be presented.

Marjorie Greenberg suggested seeking funding for the translations and review process. Lack of resources is a barrier. Alarcos requested a supporting letter from the EC to enable requests for funding.

This item remains on the agenda for the mid-year meeting, where the group will identify persons to work on the additional modules.

## **Other ICF Education Topics**

Ros Madden provided a presentation on the “*Overview of ICF,*” which she and Catherine Sykes have been drafting over the past year. Good feedback had been received from the FDRG and the EC. The document is in version 10 at present. It will be both introductory and informational to people with interest in ICF use. It is also possible that an “information sheet” on ICF will be developed in the future. Additional comments on the document are welcome as this document moves closer to finalization. Comments are especially welcome from reviewers not familiar with ICF.

Cassia reported regarding dissemination of ICF Curriculum Modules approved by the Network in 2008. Version 1 is posted on the EC web site and is available for translation. This document also perhaps could be hosted on the WHO-FIC website and linked to the EC site.

## **WHO-FIC – IFHRO Joint Collaboration**

Marjorie provided a brief overview of the history, accomplishments and membership of the WHO-FIC – IFHRO Joint Collaboration (JC) and the International Training and Certification Program, which has been the JC's main focus.

### *Additional mortality exam pilots*

A short summary was presented by Cassia Buchalla detailing that the international mortality (underlying cause of death) coding exam has been translated into Spanish and piloted in Mexico. Four coders from the State of Mexico and ten trainers from the WHO-FIC Network Collaborating Centre completed all 100 questions. Preliminary results from this pilot were presented: the trainers did much better on the exam than the coders. The Mexican Center also provided some suggestions for improving the exam; among them to divide it in three sections, making more cases of rules 1, 2 and 3, etc. These suggestions were appreciated and will be reviewed by the EC and JC.

### *Exploration of Morbidity Exam*

Joon H. Hong made a presentation showing the results of a survey done to assess the need for an International Morbidity Coding Exam, and to propose next steps for development of such an exam. The subject was discussed and some points were raised, with agreement that it was not practical to develop the exam until the MBRG members complete reviewing the morbidity rules in ICD 10. Julie Rust and Olafr reported that review of Volume 2 is on the work plan for the MBRG, and work has already started. The MBRG will likely be “raiding the treasure chest” of countries that have used Volume 2 to develop their own instructions. Selection of main condition has been reviewed and a proposal for ICD-11 has been developed and put forward. Basically no conclusion or commitment can be made by the EC and JC regarding the morbidity exam because of the barriers identified – lack of agreement on rules and absence of resources. More and frank discussion will be needed, and the EC/JC will continue to discuss the development of an exam in collaboration with the MBRG as Volume 2 instructions are reviewed and solutions developed.

The EC Chair and JC Co-Chairs had prepared a proposal to Health Metrics Network (HMN) for resources to continue and expand the International Training and Certification program. The proposal included adding pre and post tests and advanced modules to the ICD-10 training tool, pilot testing the exam in one or more developing countries and supporting improvement of health records. Unfortunately, the proposal did not meet the HMN current funding priorities.

## **Information Sheets for Users**

At the 2008 mid-year meeting it was decided that information sheets (rather than the longer and less-easily updated brochures) for users of different types of coded data would be useful, and work was started. Several information sheets have been developed (or at least drafted); one each for users of coded morbidity data and mortality data and one for documentation standards; an additional information sheet describes the JC and replaces the previous brochure.

Marjorie is working on a sheet for civil registration, and she is exploring sheets on ICF-related topics with FDRG. Sue Walker presented the information sheet for users of coded mortality data, which was prepared by a work group headed by Stefanie Weber. It is intended for distribution to people getting mortality statistics from statistical agencies. It should be helpful for users of coded mortality data to understand better what they are (and are not) getting. Sue mentioned that the MRG discussions had included a suggestion that WHO would put all the different information sheets in one spot on their website. Marjorie mentioned that the WHO-FIC Network is working on a publication standard.

The general feeling was that the development of information sheets should be a task that the EC will continue to include in its work plan.

A motion was made to approve three information sheets:

- Training and Certification to Promote High-Quality Data
- What You Should Know About Clinical Documentation
- Uses of Coded Clinical Data

They are labeled as version 1 and are dated to facilitate review and revision.

Two more information sheets will be added to the mid-year meeting for approval:

- Civil Registration and Vital Statistics
- Uses of Mortality Data

This motion was approved without dissention.

## **Standards for Medical Records**

Sue Walker presented an outline of the paper, *The Relationship between Health Record Documentation and Clinical Coding* that she co-authored with Lorraine Nicholson, IFHRO President. In the paper the authors describe that coders translate clinical documentation into coded format; they should not need to make any assumptions. The completeness and accuracy of the coding reflects the quality of the source documentation in addition to the skills and knowledge of the clinical coder. Health Record standards for both the structure of records and the completeness and content of the clinical documentation contained within records are required. In many developing countries, such standards do not exist and support for their promulgation is required as one of the pre-requisites to improving the quality and completeness of the coded data

Work is needed to assure that documentation problems do not become a coding problem. This can be done by the IFHRO and EC, who can develop standards for use by countries without their own. There was general agreement that work on standards for medical records is something that the WHO-FIC Network – IFHRO Joint Collaboration should include in the new work plan.

## **Best Practices and Tools**

A number of presentations were given under Best Practices.

### *Preparation Activities for ICD-10-CM*

Margaret made a presentation announcing that, at last, ICD-10-CM will be implemented in the United States on October 1, 2013 for all health care claims, along with a new procedure coding system called ICD-10-PCS for inpatient records. A multi-year effort has been developed by the American Health Information Management Association to facilitate the transition to ICD-10-CM. This includes assessment of the impact of the change and of training needs. The educational approach will be to identify all stakeholders and to prepare schools and trainers first. It's believed that primary stakeholders (e.g., coding professionals) should receive training in code assignment no more than six months before the use of the codes is required. For coders, the anticipated training hours required for both classifications is 40 hours; 16 hours are recommended for ICD-10-CM alone. Education will include improvement of documentation to optimize the characteristics and features of the two new classifications. General Equivalence Maps have been developed to link ICD-9-CM to ICD-10-CM for data transition and comparison. The focus on success will be achieved by advancing early preparation to create a prepared workforce and national health care delivery system readiness

### *Current Status of HIM Education*

Yukiko Yokobori made a presentation summarizing Health Information Management Education in Countries Overseas. She reported on the results of a survey on the background against which health information is managed and on the state of education in respective countries. The goal is to use the findings to improve the quality of health information management education in respective countries and widely promote the implementation of ICD around the world. Seventeen countries responded to the survey, which included questions on basic information, classifications used, educational institutions, certifying institutions, and qualifications. Information on the different classifications used in the countries for diagnosis and interventions reporting was of particular interest to the participants. The paper noted that Vietnam had begun morbidity coding through their participation in the Asia-Pacific Network, demonstrating the Network's effectiveness in promoting the implementation of ICD. The survey also revealed that with the exception of countries like Japan, it is rare for physicians and nurses to obtain the qualification of "health information managers." Yukiko will continue her work, expanding the study to include more countries while continuing to monitor changes in countries already evaluated.

### *Methods for developing Podcasts for ICF Education*

John Hough showed a podcast he had prepared on developing and using a podcast as a teaching tool for ICF. A podcast would support rather than supplant the e-learning tools already available from the WHO-FIC. A podcast can be posted on a web site for others to review and becomes a nearly free and effective way to deliver training for a course.

### *ICF Activities by the WCPT*

A poster by Catherine Sykes and Brenda Myers described recent work by the World Confederation for Physical Therapy (WCPT) on the promotion of ICF as part of the ongoing collaborative work program with WHO. These include a regular update on ICF activities on the WCPT website, an on-line ICF web forum, and workshops. A network of WCPT members with ICF expertise is included in the educational and promotional activities. This group also will be a source of expertise for proposing and commenting on ICF updates.

### *Impact of Teaching Physiotherapy Students*

Jennifer Jelsma spoke briefly about her poster, “*Impact of Teaching Physiotherapy Students*,” which was presented in a subsequent plenary poster session. In this study, the ICF was introduced as the overt basis for clinical decision making by physiotherapy students at University of Cape Town, South Africa in 2009. Twelve student clinical assessments of children with disabilities from 2008 were compared with eleven from the 2009 cohort by two independent assessors who were blind as group and the purpose of the study. The assessments after the introduction of the ICF were found to be significantly more comprehensive and resulted in better intervention planning. In contrast, lectures regarding the use of the ICF did not appear to bring about the same change in student performance.

### *MR/HIM and ICD-10 Coding Education in Sri Lanka*

Dr. Nandalal Wijsekera briefly described the difficulties with health information system development in Sri Lanka. WHO-SEARO, in collaboration with the Australian National Centre in Classification in Health, has developed a group of trainers who conduct medical records and ICD-10 training courses within the country. Participants from other countries in the region also have been trained. Although the impact of training on the quality of information generated by medical records departments has not yet been evaluated, more than 600 persons have been trained in the past ten years. JC co-chair, Sue Walker, especially was recognized for her contribution to these educational efforts.

## **Briefing Kit for Collaborating Centres**

The content and implementation plans for the Briefing Kit for Collaborating Centres was approved by the EC. Marjorie explained that enough material has been gathered to actually begin posting the kit on a WHO share point site. All current Collaborating Centres were requested to prepare short profiles of their respective centres for the Briefing Kit, and as of the meeting in Seoul, profiles had been received from the majority of Centres. Rita Scichilone volunteered to help the EC co-chairs create and populate the site. It will be necessary to agree on a process for maintaining and updating the documents and links, as needed.

A suggestion was made that perhaps all *Best Practices Presentations* from recent meetings could be combined into a type of monograph. The importance of obtaining resources for such an effort again was documented.

## **Other Business and Discussion of Future Work**

Self-learning projects will be a continuing agenda item for the mid-year meeting. It also was suggested that re-certification of individuals and materials previously recognized should be an action item.

A one-page flyer was distributed on the Italian portal for classification information site.

### *Mid-year meeting*

The co-chairs announced that the EC and JC will hold a mid-year meeting in Cologne, Germany on February 22-24, 2010. As in the past, this will be held in conjunction with meetings of the International Collaborative Effort on Automating Mortality Statistics Planning Committee and the Mortality Reference Group. The Morbidity Reference Group and Family Development Committee also plan to meet in Cologne the following week. An agenda has not been set, but it is hoped that there will be an opportunity to update on the translation status of both ICD-10 and ICF training tools and on their pilots. The EC and JC also will continue to hold periodic teleconferences.