


U.S. Department of Labor Employment and Training Administration Office of Apprenticeship (OA) Washington, D.C. 20210	<u>Distribution:</u> A-541 Headquarters A-544 All Field Tech A-547 SD+RD+SAA+; Lab.Com 	<u>Subject:</u> New Apprenticeable Occupation: Clinical Documentation Improvement Specialist (CDIS) <u>Code:</u> 400.1
Symbols: DSNIP/SHS		Action: Immediate

PURPOSE: To inform the staff of OA and the State Apprenticeship Agencies (SAA), Registered Apprenticeship program sponsors and other Registered Apprenticeship partners of a new apprenticeable occupation, Clinical Documentation Improvement Specialist (CDIS).

Clinical Documentation Improvement Specialist (CDIS)
O*NET-SOC Code: 29-2071.00
RAPIDS Code: 2026CB
Type of Training: Competency-based

BACKGROUND: Dr. Desla Mancilla, RHA, Sr. Director, Academic Affairs, AHIMA Foundation, submitted the Clinical Documentation Improvement Specialist (CDIS) occupation for an apprenticeability determination.

The CDIS coordinates and performs day to day operations, providing concurrent/retrospective review, and improving documentation of all conditions, treatments, and care plans to ensure highest quality care is provided to the patient. In addition, CDIS educates clinical staff in appropriate documentation criteria. The CDIS ensures that documentation reflects Medicare Severity Diagnosis Related Groups (MS-DRG), case mix index, severity of illness, risk of mortality, physician profiling, hospital profiling, and reimbursement rules.

If you have any questions, please contact Stephen Sage, Apprenticeship and Training Representative, Division of Standards and National Industry Promotion, at 202-693-3221.

ACTION: OA staff should familiarize themselves with this bulletin and the attached Work Process Schedule and Related Instruction Outline, as a source for developing apprenticeship standards and/or providing technical assistance.

NOTE: This bulletin is being sent via electronic mail.

Attachment

- [CLINICAL DOCUMENTATION IMPROVEMENT SPECIALIST \(CDIS\) O*NET-SOC CODE: 29-2071.00 RAPIDS CODE: 2026CB](#)

**WORK PROCESS SCHEDULE
 CLINICAL DOCUMENTATION IMPROVEMENT SPECIALIST (CDIS)
 O*NET-SOC CODE: 29-2071.00 RAPIDS CODE: 2026CB**

Position Description: The Clinical Documentation Improvement Specialist (CDIS) will be responsible for demonstrating competency in coordinating and performing day to day operations, providing concurrent/retrospective review, and improving documentation of all conditions, treatments, and care plans to ensure highest quality care is provided to the patient. In addition, CDIS should be able to educate clinical staff in appropriate documentation criteria. The CDIS will ensure that documentation reflects Medicare Severity Diagnosis Related Groups (MS-DRG), case mix index, severity of illness, risk of mortality, physician profiling, hospital profiling, and reimbursement rules. Monitoring changes in laws, rules, regulations, and code assignments that impact documentation and reimbursement is implicit. Knowledge and skills on Microsoft Access database management and ability to present information effectively and clearly is essential. A Bachelor's degree in healthcare related field with a Registered Health Information Administrator [RHIA] or Registered Nurse [RN] credential is required. Clinical Documentation Improvement Practitioner (CDIP) and Certified Clinical Documentation Specialist (CCDS) are preferred.

On the Job Competencies:

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Use reference resources for code assignment	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Identify principal and secondary diagnoses in order to accurately reflect the patient's hospital course	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Use coding software	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Assign and sequence ICD-9-CM codes	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Use coding conventions	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Display knowledge of payer requirements for appropriate code assignments (e.g. Content Management Systems [CMS], All Patient Refined [APR], Ambulatory Patient Groups [APG])	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Assign appropriate DRG codes	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Communicate with the coding/HIM staff to resolve discrepancies between the working and final DRGs	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Assign Current Procedural Terminology [CPT] and/or Healthcare Common Procedure Coding System [HCPCS] codes	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Communicate with coding/HIM staff to resolve discrepancies in documentation for CPT assignment	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Promote Clinical Documentation Improvement [CDI] efforts throughout organization	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Foster working relationship with CDI team members for reconciliation queries	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Establish a chain of command for resolving unanswered queries	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/ Mentors verification certification
Develop documentation improvement projects	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Collaborate with physician champions to promote initiatives	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Establish consequences for noncompliance to queries or lack of responses to queries in collaboration with providers	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Develop CDI policies and procedures	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Identify opportunities for documentation improvement by ensuring that diagnoses and procedures are documented to the highest level of specificity	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Query providers in ethical manner to avoid potential fraud and/or compliance issues	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Formulate queries to providers to clarify conflicting diagnoses	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Ensure provider query response is documented in the medical record	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Formulate queries to providers to clarify the clinical significance of abnormal findings identified in the record	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track Responses to queries and interact with providers to obtain query responses	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Interact with providers to clarify Present On Admission [POA]	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Identify post-discharge query opportunities that will affect Severity Of Illness [SOI], Risk Of Mortality [ROM], and ultimately, case weight	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Collaborate with the case management and utilization review staff to effect change in documentation	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Interact with providers to clarify Hospital Acquired	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Conditions [HAC]					
Interact with providers to clarify the documentation of core measures	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Interact with providers to clarify Public Safety Indicators [PSI]	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Determine facility requirements for documentation of query responses in the record to establish official policy and procedures related to CDI query activities	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Develop policies regarding various stages of the query process and time frames to avoid compliance risk	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track denials and documentation practices to avoid future denials	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Trend and track physician query response	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track working DRG (CDS) and coder final code	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Perform quality audits of CDI content to ensure compliance with institutional policies and procedures or national guidelines	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Trend and track physician query content	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Trend and track physician and query provider	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Trend and track physician query volume	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Measure the success of the CDI program through dashboard metrics	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track data for physician benchmarking and trending	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Compare institution with external institutional benchmarks	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track data for CDI benchmarking and trending	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Track data for specialty benchmarking and trending	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Use CDI data to adjust departmental workflow	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Articulate the implications of accurate coding	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Educate providers and other members of the healthcare team about the importance of the documentation improvement program and the need to assign diagnoses and procedures when indicated, to their highest level of specificity	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Articulate the implications of accurate coding with respect to research, public health reporting, case management and reimbursement	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Monitor changes in the external regulatory environment in order to maintain compliance with all applicable agencies	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Educate the appropriate staff on the clinical documentation improvement program including accurate and ethical documentation practices	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

COMPETENCY	TIME	OJL	COMPONENT 1	COMPONENT 2	COMPONENT 3
Develop educational materials to facilitate documentation that supports severity of illness, risk mortality, and utilization of resources	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Research and adapt successful best practices within the CDI specialty that could be utilized at one's own organization	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Apply regulations pertaining to CDI activities	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification
Consult with compliance and HIM department regarding legal issues surrounding CDI efforts	<ul style="list-style-type: none"> Competency Based 		Baseline training	Intermediate training	Completion/Mentors verification certification

On the job competencies will be evaluated as competency-based achievements. Each of the competencies will have objectives and completion high low certification.

All competencies will be verified and signed off by assigned mentors/trainers/supervisors.

All related instruction and supplementary training will be structured as a part of the certification process.

**RELATED INSTRUCTION OUTLINE
 CLINICAL DOCUMENTATION IMPROVEMENT SPECIALIST (CDIS)
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Clinical Documentation Improvement Specialist Baccalaureate Degree in HIM	
Course	Hours
Medical Terminology	45
Anatomy and Physiology	45-90
Pathophysiology	30-45
Pharmacology	15-30
Reimbursement/Revenue Cycle	45
Legal and Compliance	45
Health Information and Delivery Systems	45
Health Record and Data Content	90
Coding Classification	90-180
Health Information Systems	90
Principles of Research	45
Statistics	45

**RELATED INSTRUCTION OUTLINE
CLINICAL DOCUMENTATION IMPROVEMENT SPECIALIST (CDIS)
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Clinical Documentation Improvement Specialist Baccalaureate Degree in HIM (continued)	
Course	Hours
Healthcare Human Resource Management	45
Quality Improvement	45
Project Management	45
Leadership	45
Data Analysis	45
Total Hours	855-1020

