



Healthcare Clinical Documentation Improvement (CDI) Checklist 2026

Pre-Review & Patient Record Integrity

Verification of patient identifiers, record completeness, and initial assessment of the presence of all required clinical documentation components.

Record Review Date

Patient Medical Record Number (MRN)

Reviewer Identity

- ☐ CDI Specialist
- ☐ Clinical Auditor
- ☐ Physician Lead

Initial Documentation Components Present

- ☐ Admission Note
- ☐ Progress Notes
- ☐ Discharge Summary
- ☐ Consultation Reports

Discrepancies Found in Patient Identity or Record Setup

Write something...

Auditor Verification Signature

Clinical Specificity & Granularity

Audit of diagnoses, symptoms, and acuity levels to ensure documentation meets ICD-10-CM/PCS coding requirements and avoids vague terminology.

Diagnosis Specificity Level

- ☐ Fully Specified (Meets ICD-10 Criteria)
- ☐ Vague/Unspecified (Requires Query)
- ☐ Incomplete/Missing Laterality

Missing Granularity Elements

- ☐ Laterality (Left/Right/Bilateral)
- ☐ Acuity/Severity (Acute/Chronic)
- ☐ Anatomical Site/Location
- ☐ Etiology/Cause
- ☐ Stage/Severity Grade

Identified Ambiguous Terms

Write something...

Clinical Documentation Improvement Notes

Write something...

Number of Queries Initiated

Enter a number...

Physician Query Process & Documentation Accuracy

Monitoring the efficiency and clarity of physician queries, ensuring all clarifications are evidence-based and supported by clinical indicators.

Query Date

Enter date...

Query Type

- ☐ Clarification
- ☐ Addition
- ☐ Conflict Resolution
- ☐ Specificity Improvement

Documentation Discrepancies Identified

- ☐ Missing Clinical Indicators
- ☐ Conflicting Physician Notes
- ☐ Incomplete Diagnosis
- ☐ Inconsistent Lab/Imaging Correlation

Description of Clinical Query Detail

Write something...

Reviewer/Physician Acknowledgement

Supporting Clinical Evidence (Labs/Imaging)

 Upload File

Comorbidity & Complication (CC/MCC) Capture

Review of documentation for potential undocumented CCs or MCCs that impact DRG assignment and hospital reimbursement accuracy.

Identified CC/MCC Indicators

- ☐ Sepsis (Sepsis-3 criteria met)
- ☐ Acute Respiratory Failure
- ☐ Acute Kidney Injury (AKI)
- ☐ Encephalopathy
- ☐ Malnutrition
- ☐ Other CC/MCC identified

Clinical Evidence for CC/MCC

Write something...

Discrepancy Details & Query Summary

Write something...

Impact on DRG Assignment

- ☐ Increased Weight (Shift to higher DRG)
- ☐ No Change to DRG
- ☐ Potential Under-coding Detected

Date of Documentation Review

Enter date...

CDI Specialist Verification

Clinical Indicators & Evidence Alignment

Cross-referencing laboratory results, imaging reports, and nursing notes with physician diagnoses to ensure clinical consistency throughout the chart.

Clinical Indicator Present

- ☐ Yes
- ☐ No
- ☐ Inconclusive/Requires Query

Supporting Evidence Sources

- ☐ Laboratory Results
- ☐ Radiology/Imaging Reports
- ☐ Nursing Progress Notes
- ☐ Vital Signs Trends
- ☐ Pathology Reports
- ☐ Physician Consult Notes

Discrepancy Identified

Write something...

Analysis of Clinical Evidence Alignment

Write something...

Supporting Lab/Imaging Documentation

 Upload File

Date of Clinical Evidence Review

Enter date...

Coding & Reimbursement Alignment

Ensuring that the clinical narrative aligns with the assigned DRG, CPT, and HCPCS codes to minimize denials and audit risks.

Assigned DRG (Diagnosis Related Group)

- ☐ DRG Verified
- ☐ Discrepancy Found
- ☐ Pending Query

Discrepancy Types Identified

- ☐ Under-coding of CC/MCC
- ☐ Inaccurate Procedure Code
- ☐ Mismatched Clinical Indicators
- ☐ Unsupported Diagnosis

Coding Discrepancy Notes

Write something...

Estimated Reimbursement Impact (\$)

Enter a number...

Audit Completion Date

Enter date...

Compliance Officer Authorization

Compliance & Regulatory Standards

Verification that all documentation adheres to 2026 CMS guidelines, HIPAA privacy standards, and hospital-specific regulatory mandates.

Regulatory Frameworks Applied

- ☐ CMS Guidelines
- ☐ HIPAA Privacy/Security
- ☐ The Joint Commission (TJC) Standards
- ☐ State Department of Health Requirements

Compliance Audit Status

- ☐ Fully Compliant
- ☐ Minor Deficiencies Found
- ☐ Major Non-Compliance Identified

Date of Compliance Review

Enter date...

Regulatory Gap Analysis & Findings

Write something...

Compliance Officer Verification

Supporting Evidence & Audit Documentation

 Upload File

Post-Review Feedback & Physician Education

Documentation of CDI interventions, feedback loops for clinical staff, and tracking of educational impact on documentation quality.

Review Completion Date

Enter date...

Physician Feedback Category

- ☐ Educational Opportunity Identified
- ☐ Documentation Error Corrected
- ☐ No Intervention Required
- ☐ Query-Driven Clarification

Summary of Clinical Feedback Provided

Write something...

Targeted Improvement Areas

- ☐ Specificity of Diagnosis
- ☐ Linkage of Clinical Indicators
- ☐ Acuity/Severity Documentation
- ☐ Timeliness of Documentation

CDI Specialist Verification

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✓ Finish

 **Generate Sample Report**