# Tandem Record Review Checklist

*Editor’s note: New CDI specialists and/or their mentors can use this checklist during job shadowing exercises. As the new CDI staff member works through the record review he or she can fill in the spreadsheet. His or her mentor or manager can then follow-up filling in the spreadsheet with additional insight and information while the employee can keep to use as a learning reference.*

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| --- | --- | --- | --- | --- |
| Record number: | New Staff:  Review Date: | Mentor:  Review Date: | When different, provide rationale to support final choice. | Additional questions/comments |
| Principal  diagnosis |  |  |  |  |
| List secondary diagnoses  and identify where found within the record  (highlight CCs & MCCs) |  |  |  |  |
| Working DRG |  |  |  |  |
| What query opportunities were identified? |  |  |  |  |
| What type of query did each reviewer formulate (i.e., did one person draft a “yes/no” query and the other write an open-ended query)? |  |  |  |  |
| List clinical indicators used to support the query |  |  |  |  |