

Sample CDI Career Ladder Overview

Title	Experience and education	Core factors and impact on services provided	Job description
Clinical documentation specialist I	<ul style="list-style-type: none"> • 5 years nursing experience • Licensed to practice as a registered nurse in the state of North Carolina • BSN required 	<p>Core factors: Novice/beginner level.</p> <p>Impact: Provide basic CDI chart review.</p>	<ul style="list-style-type: none"> • Job summary: Reviews medical records documentation and identifies opportunities for improving documentation. • Job duties: <ul style="list-style-type: none"> • Collects data and maintains records that document cost and benefits. • Facilitates and enhances coding. • Experience and education: <ul style="list-style-type: none"> • Performs work under general supervision. • Handles moderately complex issues and problems and refers more complex issues to higher-level staff. • Possesses solid working knowledge of subject matter. • Reports to: Reports to a department manager. • Competencies: Customer/client oriented. Detail oriented. Attentive.
Clinical documentation specialist II	<ul style="list-style-type: none"> • 5 years nursing experience • 2 years CDI experience • Licensed to practice as a registered nurse in the state of North Carolina • BSN required • Advanced certification related to CDI (CCDS, CDIP, CCDS-O, CDEO) 	<p>Core factors: Intermediate level. Exhibits expertise associated with CDI certification, recognized by Magnet. General industry consensus is that it takes more than 2 years to gain in-depth knowledge of this field.</p> <p>Impact: Provide comprehensive CDI chart review along with more advanced critical</p>	<ul style="list-style-type: none"> • Job summary: Reviews medical records documentation and identifies opportunities for improving documentation. • Job duties: <ul style="list-style-type: none"> • Collects data and maintains records that document cost and benefits. • Facilitates and enhances coding. • Assists with special projects, formal provider education, and orientation of new staff. • Experience and education: <ul style="list-style-type: none"> • Performs work under general supervision.

		<p>thinking skills. Assist with special projects and provider education sessions.</p>	<ul style="list-style-type: none"> • Handles moderately complex issues and problems and refers more complex issues to higher-level staff. • Possesses solid working knowledge of subject matter. • May provide leadership, coaching, and/or mentoring to a subordinate group. • Requires a bachelor’s degree and 5 years of clinical experience as well as 2 years of CDI experience and CDI-related advanced certification. • Reports to: Reports to a department manager. • Competencies: Customer/client oriented. Detail oriented. Attentive.
<p>Clinical documentation excellence team leader</p>	<ul style="list-style-type: none"> • 5 years nursing experience • 5 years CDI experience, • Licensed to practice as a registered nurse in the state of North Carolina • BSN required • Advanced certification related to CDI (CCDS, CDIP, CCDS-O, CDEO) 	<p>Core factors: Advanced level.</p> <p>Impact: Provide comprehensive second-level CDI chart review along with more advanced critical thinking skills. Troubleshoot staff issues and serve as subject matter expert.</p>	<ul style="list-style-type: none"> • Job summary: Coordinates all activities related to compliance, quality assurance, and education with the CDE staff to improve overall quality and completeness of clinical documentation of patient records. • Job duties: <ul style="list-style-type: none"> • Provides general supervision of CDE staff. • Facilitates and enhances medical record documentation. • Coordinates staff orientation and ongoing education. • Provides second-level medical record reviews. • Experience and education: <ul style="list-style-type: none"> • Performs work independently under direction of manager/director. • Handles complex issues and problems and refers most complex issues to higher-level staff. • Possesses expert knowledge of subject matter.

			<ul style="list-style-type: none"> • Provides leadership, coaching, and/or mentoring to a subordinate group. • Requires a bachelor’s degree and 5 years of clinical experience as well as 5 years of CDI experience and CDI-related advanced certification. • Reports to: Reports to a department director with dotted line to department manager. • Competencies: Customer/client oriented. Detail oriented. Attentive.
<p>Manager, clinical documentation excellence (inpatient or outpatient)</p>	<ul style="list-style-type: none"> • 5 years nursing experience • 7 years CDI experience • Licensed to practice as a registered nurse in the state of North Carolina • BSN required • Advanced certification related to CDI (CCDS, CDIP, CCDS-O, CDEO) • Master's degree in nursing or health-related field required. 	<p>Core factors: Advanced level.</p> <p>Impact: Responsible for day-to-day operations of department under the direction of the director.</p>	<ul style="list-style-type: none"> • Job summary: Provides the clinical and administrative leadership for clinical documentation excellence initiatives. Responsible for staff management and development, quality, service excellence, workplace experience and financial outcomes. • Job duties: <ul style="list-style-type: none"> • Provides leadership to staff to ensure short- and long-term goals are met by the clinical documentation excellence team • Experience and education: <ul style="list-style-type: none"> • Performs work independently, assuming accountability as delegated by the director. • Handles complex issues and problems. • Possesses expert knowledge of subject matter. • Provide leadership, coaching, and/or mentoring to a subordinate group. • Requires 5 years of clinical experience as well as 7–10 years of CDI experience and CDI-related advanced certification. Graduate degree in health-related field required. • Reports to: Reports to a department director.

			<ul style="list-style-type: none">• Competencies: Customer/client oriented. Detail oriented. Attentive.
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*Source: ACDIS Leadership Council member **Tamara Hicks, BSN, MHA, RN, CCS, CCDS, ACM-RN, CCDS-O**, director of clinical documentation excellence at Wake Forest Baptist Health in Winston-Salem, North Carolina. Published with permission.*