

Chief Complaint:

			Problem Focused	Exp. Problem Focused	Detailed	Comprehensive
HISTORY	HPI (history of present illness) elements: <input type="checkbox"/> Location _____ <input type="checkbox"/> Severity _____ <input type="checkbox"/> Timing _____ <input type="checkbox"/> Modifying Factors _____ <input type="checkbox"/> Quality _____ <input type="checkbox"/> Duration _____ <input type="checkbox"/> Context _____ <input type="checkbox"/> Associated Signs & Symptoms _____		Brief	Brief	Extended	Extended
			1 – 3 elements		≥ 4 elements or status of > 3 chronic or inactive conditions	
	ROS (Review of Systems): <input type="checkbox"/> Constitutional (wt loss, etc.) _____ <input type="checkbox"/> Eyes _____ <input type="checkbox"/> Ears, nose, mouth, throat _____ <input type="checkbox"/> GI _____ <input type="checkbox"/> GU _____ <input type="checkbox"/> Card/Vasc _____ <input type="checkbox"/> Resp _____ <input type="checkbox"/> Musculo _____ <input type="checkbox"/> Neuro _____ <input type="checkbox"/> Psych _____ <input type="checkbox"/> Endo _____ <input type="checkbox"/> Integumentary (skin, breast) _____ <input type="checkbox"/> Hem/lymph _____ <input type="checkbox"/> All / Immun _____ <input type="checkbox"/> "All others negative" _____		None	Pertinent to problem 1 system	Extended 2-9 systems	Complete ≥ 10 systems, or some systems with statement "all others negative"
PFSH (past medical, family, social history) areas: <input type="checkbox"/> Past History (the patient's past experiences with illnesses, operations, injuries and treatments) <input type="checkbox"/> Family History (a review of medical events in the patient's family, including diseases which may be hereditary or place the patient at risk) <input type="checkbox"/> Social History (an age appropriate review of past and current activities)		None	None	* Pertinent 1 or 2 history areas	* Complete 2 or 3 history areas	
			Circle the entry farthest to the right for each history area. To determine History Level, draw a line down the column with the circle farthest to the left.			
If physician is unable to obtain history, the record should describe circumstances that preclude obtaining it.		No PFSH required: Subsequent Hospital Care Follow-up inpatient consults Subsequent Nursing Facility Care		* PFSH requirement Established patients (office/outpatient, Domiciliary, home) and emergency department: Pertinent – 1 history area; Complete 2 history areas New Patients (office/outpatient, Domiciliary, home), consultations, initial hospital, hospital observation, comprehensive nursing facility assessments; Pertinent – 2 history areas; complete – 3 history areas		

EXAM	GENERAL MULTI-SYSTEM EXAM		SINGLE ORGAN SYSTEM EXAM	
	1 – 5 elements identified by a bullet (●)	PROBLEM FOCUSED	1 – 5 elements identified by a bullet (●)	
	≥ 6 elements identified by a bullet (●)	EXP. PROBLEM FOCUSED	≥ 6 elements identified by a bullet (●)	
	≥ 2 elements identified by a bullet (●) from 6 areas / systems OR ≥ 12 elements identified by bullet (●) from > 2 areas / systems	DETAILED	≥ 2 elements identified by a bullet (●) from 6 areas / systems OR ≥ 12 elements identified by bullet (●) from > 2 areas / systems	
	Perform all elements identified by a bullet (●) from ≥ 9 areas / systems AND document ≥ 2 elements identified by a bullet (●) from 9 areas / systems	COMPREHENSIVE	Perform all elements identified by a bullet (●) from ≥ 9 areas / systems AND document ≥ 2 elements identified by a bullet (●) from 9 areas / systems	

A	Number of Diagnoses or Treatment Options			
Problems to Exam Physician		Number X Points = Result		
Self-limited or minor (stable, improved or worsening)		1	Max=2	
Est. problem (to examiner); stable, improved		1		
Est. problem (to examiner); worsening		2		
New problem (to examiner); no additional workup planned		3	Max=3	
New problem (to examiner); additional workup planned		4		
Total				

Bring total to **Line A** in Final Result for Complexity

C	Amount and/or complexity of Data to Be Reviewed	
Data to be Reviewed		Points
Review and/or order of clinical Lab Test(s)		1
Review and/or order of tests in the radiology section of CPT		1
Review and/or order of tests in the medicine section of CPT		1
Discussion of test results with performing Physician		1
Decision to obtain old records and/or obtain history from someone other than patient		1
Review and summarization of old records and/or obtaining history from someone other than patient and/or discussion of case with another health care provider		2
Independent visualization of image, tracing or specimen itself (not simply review of report)		2
Total		

Bring total to **Line C** in Final Result for Complexity

B	Risk of Complications and/or Morbidity or Mortality		
Level of Risk	Presenting Problem(s)	Diagnostic Procedure(s) Ordered	Management Options Selected
MINIMAL	<ul style="list-style-type: none"> One self limited or minor problem, <i>e.g. cold, insect bite, tinea corporis</i> 	<ul style="list-style-type: none"> Laboratory tests requiring venipuncture Chest x-rays EKG/EEG Urinalysis Ultrasound, <i>e.g. echo</i> KOH prep 	<ul style="list-style-type: none"> Rest Gargles Elastic bandages Superficial dressings
	<ul style="list-style-type: none"> Two or more self limited or minor problems One stable chronic illness <i>e.g. well controlled HTN, non-insulin dependent diabetes, cataract, BPH</i> Acute uncomplicated illness or injury <i>e.g. cystitis, allergic rhinitis, simple sprain</i> 	<ul style="list-style-type: none"> Physiologic tests not under stress, <i>e.g. pulm. Function tests</i> Non-cardiovascular imaging studies with contrast, <i>e.g. barium enema</i> Superficial needle biopsies Clinical laboratory tests requiring arterial puncture Skin biopsies 	<ul style="list-style-type: none"> Over the counter drugs Minor surgery with no identified risk factors Physical therapy Occupational therapy IV fluids without additives
MODERATE	<ul style="list-style-type: none"> One or more chronic illnesses with mild exacerbation, progression, or side effects of treatment Two or more stable chronic illnesses Undiagnosed new problem with uncertain prognosis, <i>e.g. lump in breast</i> Acute illness with systemic symptoms, <i>e.g. pyelonephritis, pneumonitis, colitis</i> Acute complicated injury, <i>e.g. head injury with brief loss of consciousness</i> 	<ul style="list-style-type: none"> Physiologic tests under stress, <i>e.g. cardiac stress test fetal contraction stress test</i> Diagnostic endoscopies with no identified risk factors Deep needle or incisional biopsy Cardiovascular imaging studies with contrast and no identified risk factors, <i>e.g. arteriogram, cardiac cath</i> Obtain fluid from body cavity, <i>e.g. lumbar puncture, thoracentesis, culdocentesis</i> 	<ul style="list-style-type: none"> Minor surgery with identified risk factors Elective major surgery (open, percutaneous or endoscopic) with no identified risk factors Prescription drug management Therapeutic nuclear medicine IV Fluids w/additives Closed treatment of fracture or dislocation without manipulation
	<ul style="list-style-type: none"> One or more chronic illnesses with severe exacerbation, progression, or side effects of tx. Acute or chronic illnesses or injuries that may pose a threat to life or bodily function, <i>e.g. multiple trauma, acute MI, pulmonary embolus, severe respiratory distress, progressive severe rheumatoid arthritis, psychiatric illness with potential threat to self or others, peritonitis, acute renal failure</i> An abrupt change in neurologic status, <i>e.g. seizure, TIA, weakness, or sensory loss</i> 	<ul style="list-style-type: none"> Cardiovascular imaging studies with contrast with identified risk factors Cardiac electrophysiological tests Diagnostic endoscopies with identified risk factors Discography 	<ul style="list-style-type: none"> Elective major surgery (open, percutaneous or endoscopic) with identified risk factors Emergency major surgery (open, percutaneous or endoscopic) Parenteral controlled substances Drug therapy requiring intensive monitoring for toxicity Decision not to resuscitate or to de-escalate care because of poor prognosis

Bring result to **Line B** in Final Result for Complexity

Final Result for Complexity

A	Number diagnoses or treatment options	≥1 Minimal	2 Limited	3 Multiple	≥4 Extensive
B	Highest Risk	Minimal	Low	Moderate	High
C	Amount and/or complexity of data	>1 Minimal or low	2 Limited	3 Moderate	>4 Extensive
Type of decision making		Straight Forward	Low Complex	Moderate Complex	High Complex

Draw a line down the column with 2 or 3 circles and circle Decision Making Level OR draw a line down the column with the center circle and circle the Decision Making Level

E/M Documentation Worksheet pg.3
Created 09/15/00

E/M Documentation Worksheet pg. 1
Created 09/15/00 – Revised 12/26/00