

# E/M WORKSHEET



Chief Complaint: \_\_\_\_\_

## 1. History

<b>HISTORY</b>	<b>HPI: Status of chronic conditions:</b> <input type="checkbox"/> 1 condition <input type="checkbox"/> 2 conditions <input type="checkbox"/> 3 conditions <b>OR</b>		Status of 1-2 chronic conditions		Status of 3 chronic conditions
	<b>HPI (history of present illness) elements:</b> <input type="checkbox"/> Location <input type="checkbox"/> Duration <input type="checkbox"/> Modifying factors <input type="checkbox"/> Quality <input type="checkbox"/> Timing <input type="checkbox"/> Associated signs and symptoms <input type="checkbox"/> Severity <input type="checkbox"/> Context		Brief (1-3)		Extended (4 or more)
	<b>ROS (review of systems):</b> <input type="checkbox"/> Constitutional <input type="checkbox"/> Resp <input type="checkbox"/> Integumentary <input type="checkbox"/> Hem/lymph <input type="checkbox"/> Eyes <input type="checkbox"/> GI <input type="checkbox"/> Neuro <input type="checkbox"/> All/immuno <input type="checkbox"/> ENMT <input type="checkbox"/> GU <input type="checkbox"/> Psych <input type="checkbox"/> Card/vasc <input type="checkbox"/> Musculo <input type="checkbox"/> Endo	None	Pertinent to problem (1 system)	Extended (2-9 systems)	Complete (10 or more systems)
	<b>PFSH (past medical, family, social history) areas:</b> <input type="checkbox"/> Past history <input type="checkbox"/> Family history <input type="checkbox"/> Social history <div style="text-align: right;">Established/ED</div>	N/A	N/A	Pertinent (1 area)	Complete (2-3 areas)
	<div style="text-align: right;">New/Consult/Admit</div>	N/A	N/A	Pertinent (1-2 area(s))	Complete (3 areas)
<i>No PFSH required: 99231-33, 99261-63, 99311-33</i>					
<b>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.</b>		<b>PROBLEM FOCUSED</b>	<b>EXP. PROB. FOCUSED</b>	<b>DETAILED</b>	<b>COMPREHENSIVE</b>

## 2. Examination

<b>Body areas:</b> <input type="checkbox"/> Head, including face <input type="checkbox"/> Chest, including breasts and axillae <input type="checkbox"/> Abdomen <input type="checkbox"/> Neck <input type="checkbox"/> Back, including spine <input type="checkbox"/> Genitalia, groin, buttocks <input type="checkbox"/> Each extremity		<b>1995 Exam</b>	
<b>Organ systems:</b> <input type="checkbox"/> Constitutional <input type="checkbox"/> ENMT <input type="checkbox"/> Resp <input type="checkbox"/> GU <input type="checkbox"/> Skin <input type="checkbox"/> Psych <input type="checkbox"/> Eyes <input type="checkbox"/> Cardiovascular <input type="checkbox"/> GI <input type="checkbox"/> Musculo <input type="checkbox"/> Neuro <input type="checkbox"/> Hem/lymph/imm			
CPT Exam Description	95 Guidelines	97 Guidelines (General multi-system)	CPT Type of Exam
Limited to affected body area or organ system	1 body area or organ system	1-5 bulleted elements	<b>PROBLEM-FOCUSED EXAM</b>
Affected body area or organ system and other symptomatic or related organ systems	2-7 body areas or organ systems	6-11 bulleted elements	<b>EXPANDED PROBLEM-FOCUSED EXAM</b>
Extended exam of affected body area or organ system and other symptomatic or related organ systems	2-7 body areas or organ systems	12-17 bulleted elements for 2 or more systems	<b>DETAILED EXAM</b>
General multi-system	8 or more organ systems	18 or more bulleted elements for 9 or more systems	<b>COMPREHENSIVE EXAM</b>
Complete single organ system exam	Not defined	See requirements for individual single system exams	

### 3. Medical Decision Making

Number of Diagnoses and/or Management Options			
A	B	X	C = D
Problem(s) Status	Number	Points	Result
Self-limited or minor problem (stable, improved or worsening)	Max = 2	1	
Established problem (to examiner); stable, improved		1	
Established problem (to examiner); worsening		2	
New problem (to examiner); no additional work up planned	Max = 1	3	
New problem (to examiner); additional work up planned		4	
Circle total on <u>line A</u> in Final Result for Complexity table			TOTAL

Amount and/or Complexity of Data	
Reviewed Data	Points
Review and/or order of clinical labs	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 history from someone other than the 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 (not simply review of the report)	2
Circle total on <u>line B</u> in Final Result for Complexity table	TOTAL

Final Result for Complexity					
A	Number of diagnoses and/or management options	≤ 1 Minimal	2 Limited	3 Multiple	≥ 4 Extensive
B	Amount and complexity of data	≤ 1 Minimal or low	2 Limited	3 Multiple	≥ 4 Extensive
C	Highest Risk	Minimal	Low	Moderate	High
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 (middle) circle and circle the decision making level.

\*Circle the level of risk identified in Final Result for Complexity

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