**E/M Worksheet**

### Final Result for History (3 of 3 required)

#### HPI:
- **Location**
- **Severity**
- **Timing**  
  - Duration  
  - Quality  
  - Context  
  - Modifying factors  
  - Associated signs and Sx  
  - 3 Chronic Conditions

#### ROS:
- **Constitutional** (wt. Loss, etc.)  
- **ENM and T**  
- **GI**  
  - Integumentary (skin, breast)  
  - Endo

#### PFSH (past medical, family, social history) areas:
- **Past History** (the patient's past experiences with illness, operations, injuries and treatments)
- **Family Hx** (a review of medical events in the pts; family, incl. diseases which may be hereditary or place the patient at risk)
- **Social History** (an age appropriate review of past and current activities)

#### Comments:

### EXAM

#### Body Areas:
- Head, incl. Face  
- Neck  
- Chest, incl. breast and axillae

#### Organ Systems:
- Constitutional (e.g. vital, gen app)  
- Eyes  
- Ears, nose, mouth, throat

#### Final Result

- **Chief Complaint:**
  - OR

- **HISTORY**
  - PROBLEM FOCUSED
  - EXP PROBLEM FOCUSED
  - DETAILED
  - COMPREHENSIVE

- **Final Result**

- **Duration Modifying factors Location**
- **Severity Quality Associated signs and Sx**
- **Timing Context 3 Chronic Conditions**

- **Comments:**

- **EXAM**
  - **PROBLEM FOCUSED**
  - **EXP PROBLEM FOCUSED**
  - **DETAILED**
  - **COMPREHENSIVE**

- **Body Areas:**
  - **Complete Exam of a single body area**

- **Organ Systems:**
  - **Complete exam of a single system**

- **Comments:**

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*Complete PFSH 2 Hx areas a) Estab pts. Office (outpt) care; domiciliary care; home care; b) Emergency Dept; c) Subsequent nursing facility care*

**3 Hx area a) New pts. Office (outpt) care; domiciliary care; home care; b) Consultations c) Initial hospital care; d) hospital observation; e) comprehensive nursing facility assessments**
### MEDICAL DECISION MAKING

**BOX A:**

**Number of Diagnosis or Management Options (Nx P=R)**

<table>
<thead>
<tr>
<th>Problems (to exam physician)</th>
<th>Number</th>
<th>Points</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-limited or minor (stable, improved or worsening)</td>
<td>Max = 2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Est. Problem; stable, improved</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Est. Problem; worsening</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New problem: no additional work-up planned</td>
<td>Max = 1</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>New problem: additional work-up planned</td>
<td></td>
<td>4</td>
<td></td>
</tr>
</tbody>
</table>

*Bring total to line A in Final Result for MDM*

**BOX B:**

**Amount and/or Complexity of Data to be reviewed**

<table>
<thead>
<tr>
<th>Points</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and/or order of clinical lab tests</td>
<td>1</td>
</tr>
<tr>
<td>Review and/or order of tests in the radiology section of CPT</td>
<td>1</td>
</tr>
<tr>
<td>Review and/or order of tests in the medicine section of CPT</td>
<td>1</td>
</tr>
<tr>
<td>Discussion of test results with performing physician</td>
<td>1</td>
</tr>
<tr>
<td>Decision to obtain old records and/or obtaining history from someone other than patient</td>
<td>1</td>
</tr>
<tr>
<td>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</td>
<td>2</td>
</tr>
</tbody>
</table>

*Bring total to line B in Final Results for MDM*

**BOX C:**

**Risk Level**

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Presenting Problem(s)</th>
<th>Diagnostic Procedure(s) Ordered</th>
<th>Management Options Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MINIMAL</strong></td>
<td>-One self-limited or minor problem; e.g. cold, insect bite, tinea corporis</td>
<td>-Lab tests requiring venipuncture -Chest x-rays -EKG/EEG -Urinalysis -Ultrasound; e.g., echo -KOH Prep</td>
<td>Rest -Gargles -Elastic bandages -Superficial dressings</td>
</tr>
<tr>
<td><strong>LOW</strong></td>
<td>-Two or more self-limited or minor problems -One stable chronic illness; e.g., well controlled hypertension or non-insulin dependent diabetes, cataract, BIB -Acute uncomplicated illness or injury; e.g., cystitis, allergic rhinitis, simple sprain</td>
<td>-Physiologic tests not under stress e.g., pulmonary function tests -Non-cardiovascular imaging studies w/contrast; e.g., barium enema -Superficial needle biopsies -Clinical Lab tests requiring arterial puncture -Skin biopsies</td>
<td>Over-the-counter drugs -Minor surgery with no identified risk factors -Physical therapy -Occupational therapy -IV fluids w/o additives</td>
</tr>
<tr>
<td><strong>MEDIUM</strong></td>
<td>-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; e.g., lump in breast -Acute illness with systemic symptoms; e.g., pyelonephritis, pneumonitis, colitis -Acute complicated injury; e.g., head injury with brief LOC</td>
<td>-Physiologic tests under stress; e.g., cardiac stress test, ... -Deep needle or incisional biopsy -Diagnostic endoscopies with no identified risk factors -Cardiovascular imaging studies with contrast and no identified risk factors -Obtain fluid from body cavity; e.g., lumbar puncture, thoracentesis, ciodocentesis</td>
<td>Minor surgery with identified risk factors -Elective major surgery (open, percutaneous or endoscopic) with identified risk factors -Prescription drug management -Therapeutic nuclear medicine -IV fluids with additives -Closed treatment of fracture of dislocation w/o manipulation</td>
</tr>
<tr>
<td><strong>HIGH</strong></td>
<td>-One or more chronic illnesses with severe exacerbation, progression, or side effects of treatment -Acute or chronic illnesses or injuries that pose a threat to life or bodily function; e.g., multiple trauma, acute MI, pulmonary embolus, severe respiratory distress,... -An abrupt change in neurologic status; e.g. seizure, TIA, weakness or sensory loss</td>
<td>-Cardiovascular imaging studies w/ contrast with identified risk factors -Cardiac electrophysiological studies -Diagnostic endoscopies w/identified risk factors -Discography</td>
<td>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</td>
</tr>
</tbody>
</table>

**Final Result for Complexity of Medical Decision Making:** 2 of 3 required

<table>
<thead>
<tr>
<th>A</th>
<th>Number of diagnoses or management options</th>
<th>≤ 1 Minimal</th>
<th>2 Limited</th>
<th>3 Multiple</th>
<th>≥ 4 Extensive</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Amount and complexity of data to be reviewed</td>
<td>≤ 1 Minimal</td>
<td>2 Limited</td>
<td>3 Multiple</td>
<td>≥ 4 Extensive</td>
</tr>
<tr>
<td>C</td>
<td>Risk of complications and/or morbidity or mortality</td>
<td>Minimal</td>
<td>Low</td>
<td>Moderate</td>
<td>High</td>
</tr>
</tbody>
</table>

**Type of Decision Making:** STRAIGHT FORWARD

**Minimum risk of complications and morbidity:** LOW MODERATE COMPLEX

**Total Points:** 4

**Final Result for Complexity of Medical Decision Making:** 2 of 3 required

**Final Result:** LOW MODERATE COMPLEX

**Comments:**

- Discuss with patient and/or family the need for further evaluation and management.
- Consider referral to a specialist.
- Review and discuss with the patient the potential risks and benefits of further diagnostic testing and management options.
- Discuss the potential impact of the diagnosis or management on the patient's quality of life.

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*Please note that the above information is a sample of a medical decision-making process and should be used as a guideline. Actual medical decisions should be made by a licensed healthcare provider.*
<table>
<thead>
<tr>
<th></th>
<th>99211</th>
<th>99212</th>
<th>99213</th>
<th>99214</th>
<th>99215</th>
</tr>
</thead>
<tbody>
<tr>
<td>History</td>
<td></td>
<td></td>
<td>Problem-focused</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Examination</td>
<td>Minimum problem that may not require the presence of a physician</td>
<td>Problem-focused</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Decision-Making</td>
<td>Straightforward</td>
<td></td>
<td></td>
<td>Low Complexity</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Detailed</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Comprehensive</td>
<td></td>
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</tr>
</tbody>
</table>

* Two out of three elements must be at the same level or higher to bill at that level.

E/M code