

## 2024 Nursing Facility and Home or Residence E/M Audit Tool

**Provider Name & ID:** \_\_\_\_\_

**Pt. Name:** \_\_\_\_\_

**D.O.S.** \_\_\_\_\_ **Code Billed:** \_\_\_\_\_ **Auditor's Code:** \_\_\_\_\_

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

*(Nature and severity of presenting problem)*

**Medically appropriate history and exam documented?**     **Yes**     **No**

**Time (Time may include any of the following (when not reported separately)):**

• Preparing to see the patient such as reviewing the pt.'s record, review of tests, etc.	• Obtaining and/or reviewing separately obtained history
• Performing a medically appropriate history and examination	• Counseling and educating the patient, family, and/or caregiver
• Ordering prescription medications, tests, or procedures	• Referring and communicating with other health care providers when not separately reported during the visit
• Documenting clinical information in the electronic or other health record	• Independently interpreting results when not separately reported
• Communicating results to the patient/family/caregiver	• Coordinating the care of the patient when not separately reported

**Yes**     **No**        **Face-to-face visit**

**Yes**     **No**        **Time was documented for this encounter**

\_\_\_\_\_ **minutes**    **Total amount of time documented**

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**Circle the Level of Service Based on Total Time Per Documentation (Total Time on the Date of the Encounter)**

Total Time	Straightforward-level visit	Low-level visit	Moderate-level visit	High-level visit
Nursing home (initial)		99304: 25 minutes must be met or exceeded	99305: 35 minutes must be met or exceeded	99306: 50 minutes must be met or exceeded
Nursing home (subsequent)	99307: 10 minutes must be met or exceeded	99308: 20 minutes must be met or exceeded	99309: 30 minutes must be met or exceeded	99310: 45 minutes must be met or exceeded
Nursing home (discharge)		99315: 30 min or less total time on the date of the encounter	99316: more than 30 minutes total time on the date of the encounter	
Home or Residence (New)	99341: 15 minutes must be met or exceeded	99342: 30 minutes must be met or exceeded	99344: 60 minutes must be met or exceeded	99345: 75 minutes must be met or exceeded
Home or Residence (Established)	99347: 20 minutes must be met or exceeded	99348: 30 minutes must be met or exceeded	99349: 40 minutes must be met or exceeded	99350: 60 minutes must be met or exceeded

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To qualify for a particular level of MDM, two of the three elements for that level of MDM must be met or exceeded

### Elements of Medical Decision Making

Code	Level of MDM (Based on 2 of 3 Elements of MDM)	Number and Complexity of Problems Addressed	Amount and/or Complexity of Data to be Reviewed and Analyzed <i>*Each unique test, order, or document contributes to the combination of 2 or combination of 3 in Category 1 below</i>	Risk of Complications and/or Morbidity or Mortality of Patient Management
	N/A	N/A	N/A	N/A
99307 99341 99347	Straightforward	<b>Minimal</b> <ul style="list-style-type: none"> <li>• 1 self-limited or minor problem</li> </ul>	Minimal or none	<b>Minimal risk of morbidity from additional diagnostic testing or treatment</b> <i>Examples only:</i> <ul style="list-style-type: none"> <li>• Rest</li> <li>• Superficial dressings</li> </ul>
99304 99308 99342 99348	Low	<b>Low</b> <ul style="list-style-type: none"> <li>• 2 or more self-limited or minor problems; or</li> <li>• 1 stable chronic illness; or</li> <li>• 1 acute, uncomplicated illness or injury or</li> <li>• 1 acute, uncomplicated illness or injury requiring hospital inpatient or observation level of care</li> </ul>	<b>Limited</b> <i>(Must meet the requirements of at least 1 of 2 categories)</i> <b>Category 1: Tests and documents</b> <b>Any combination of 2 of the following:</b> <ul style="list-style-type: none"> <li>• Review of prior external notes(s) from each unique source*;</li> <li>• review of the result(s) of each unique test*;</li> <li>• ordering of each unique test*</li> </ul> <b>or</b> <b>Category 2: Assessment requiring an independent historian(s)</b> <i>(For the categories of independent interpretation of tests and discussion of management or test interpretation, see moderate or high)</i>	<b>Low risk of morbidity from additional diagnostic testing or treatment</b> <i>Examples only:</i> <ul style="list-style-type: none"> <li>• Over the counter drugs</li> <li>• Physical Therapy</li> <li>• Minor surgery with no identified risk factors</li> <li>• IV fluids without additives</li> </ul>
99305 99309 99344 99349	Moderate	<b>Moderate</b> <ul style="list-style-type: none"> <li>• 1 or more chronic illnesses with exacerbation, progression, or side effects of treatment;</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>• 2 or more stable chronic illnesses;</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>• 1 undiagnosed new problem with uncertain prognosis;</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>• 1 acute illness with systemic symptoms;</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>• 1 acute complicated injury</li> </ul>	<b>Moderate</b> <i>(Must meet the requirements of at least 1 out of 3 categories)</i> <b>Category 1: Tests, documents, or independent historian(s)</b> <ul style="list-style-type: none"> <li>• <b>Any combination of 3 from the following:</b></li> <li>• Review of prior external note(s) from each unique source*;</li> <li>• Review of the result(s) of each unique test*;</li> <li>• Ordering of each unique test*;</li> <li>• Assessment requiring an independent historian(s)</li> </ul> <b>or</b> <b>Category 2: Independent interpretation of tests</b> <ul style="list-style-type: none"> <li>• Independent interpretation of a test performed by another physician/other qualified health care professional (not separately reported);</li> </ul> <b>or</b> <b>Category 3: Discussion of management or test interpretation</b> <ul style="list-style-type: none"> <li>• Discussion of management or test interpretation with external physician/other qualified health care professional/appropriate</li> </ul>	<b>Moderate risk of morbidity from additional diagnostic testing or treatment</b> <i>Examples only:</i> <ul style="list-style-type: none"> <li>• Prescription drug management</li> <li>• Decision regarding minor surgery with identified patient or procedure risk factors</li> <li>• Decision regarding elective major surgery without identified patient or procedure risk factors</li> <li>• Diagnosis or treatment significantly limited by social determinants of health</li> </ul>
99306 99310 99345 99350	High	<b>High</b> <ul style="list-style-type: none"> <li>• 1 or more chronic illnesses with severe exacerbation, progression, or side effects of treatment;</li> </ul> <b>or</b> <ul style="list-style-type: none"> <li>• 1 acute or chronic illness or injury that poses a threat to life or bodily function</li> </ul>	<b>Extensive</b> <i>(Must meet the requirements of at least 2 out of 3 categories)</i> <b>Category 1: Tests, documents, or independent historian(s)</b> <ul style="list-style-type: none"> <li>• <b>Any combination of 3 from the following:</b></li> <li>• Review of prior external note(s) from each unique source*;</li> <li>• Review of the result(s) of each unique test*;</li> <li>• Ordering of each unique test*;</li> <li>• Assessment requiring an independent historian(s)</li> </ul> <b>or</b> <b>Category 2: Independent interpretation of tests</b> <ul style="list-style-type: none"> <li>• Independent interpretation of a test performed by another physician/other qualified health care professional (not separately reported);</li> </ul> <b>or</b> <b>Category 3: Discussion of management or test interpretation</b> <ul style="list-style-type: none"> <li>• Discussion of management or test interpretation with external physician/other qualified health care professional/appropriate source (not separately reported)</li> </ul>	<b>High risk of morbidity from additional diagnostic testing or treatment</b> <i>Examples only:</i> <ul style="list-style-type: none"> <li>• Drug therapy requiring intensive monitoring for toxicity</li> <li>• Decision regarding elective major surgery with identified patient or procedure risk factors</li> <li>• Decision regarding emergency major surgery</li> <li>• Decision regarding hospitalization or escalation of hospital level of care</li> <li>• Decision not to resuscitate or to de-escalate care because of poor prognosis</li> <li>• Parenteral controlled substances</li> </ul>

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Additional comments:

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