

## 2024 Outpatient 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**

## 2024 Outpatient E/M Audit Tool

### Circle the Level of Service Based on Total Time Per Documentation

New Patient CPT Code	Total Time on the Date of the Encounter	Prolonged Provider Time
99202	15 minutes must be met or exceeded	Max out time to 99205 before adding Prolonged Time
99203	30 minutes must be met or exceeded	
99204	45 minutes must be met or exceeded	
99205	60 minutes must be met or exceeded	99XXX per 15 minutes beyond 75 minutes

Established Patient CPT Code	Total Time on the Date of the Encounter	Prolonged Provider Time
99212	10 minutes must be met or exceeded	Max out time to 99215 before adding Prolonged Time
99213	20 minutes must be met or exceeded	
99214	30 minutes must be met or exceeded	
99215	40 minutes must be met or exceeded	99XXX per 15 minutes beyond 55 minutes

## 2024 Outpatient E/M Audit Tool

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
99211	N/A	N/A	N/A	N/A
99202 99212	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>
99203 99213	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 stable, acute illness; 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>
99204 99214	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 source (not separately reported)</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>
99205 99215	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</li> <li>• Decision not to resuscitate or to de-escalate care because of poor prognosis</li> </ul>