

# Evaluation & Management (E/M) Coding Calculator



## Essentials for Determining Evaluation & Management (E/M) Codes

### Standard Codes for *Evaluation & Management (E/M)*

#### Step 1 – Determine Location of the Service

Where did this encounter between physician and patient take place?

- **Office or Other Outpatient Services:** Physician's office; walk-in clinic; ambulatory health-care center; etc.
- **Hospital Services:** Inpatient, acute care facility
- **Consultation – Office or Inpatient**
- **Emergency Department Services:** A hospital-based facility, open 24 hours a day, providing unplanned services to patients requiring immediate medical attention
- **Critical Care/Intensive Care Services:** Direct delivery of medical care for patients with a high likelihood of impending or life-threatening decline of condition
- **Nursing Facility Services:** Skilled nursing facility (SNF); intermediate care facility (ICF); long-term care facility (LTCF); psychiatric residential treatment center
- **Domiciliary, Rest Home or Custodial Care Services:** Assisted living facility; any other facility providing room, board and personal assistance services
- **Home Services:** Private residence

#### Step 2 – Determine Relationship Between Physician & Patient

The relationship between the physician and the patient is the next thing you must determine.

- **New or Established:** An established patient is one who has received professional services from this physician, or another physician of the same specialty within the same practice, during the last three years
  - If this is not stated in the physician's notes for this encounter, you may need to refer back to the patient's chart
- **Initial or Subsequent:** An initial visit is the first date of service this physician sees this patient and a subsequent visit is one on an additional date, after the first date, during this course of treatment
  - Services are reported by complete day (calendar date) of service
- **Consultation Services:** Determine who requested the consultation
  - Physician or other health-care professional = use **consultation code** from the range 99241-99255
  - Patient and/or family member = use appropriate **location of service code**, such as: outpatient 99201-99215 or hospital 99217-99239

#### Step 3 – Determine Level of History from Documentation

Remember, if it is not documented, it didn't happen!

- Histories are usually taken orally—a spoken exchange of questions and answers between the provider and the patient—but there still **MUST** be notes that record what occurred
- A patient history review of systems (ROS) is not an examination
- The physician may indicate that a body or organ system's history is **unrelated** or **non-contributory**—these terms (and similar ones) document that the physician addressed or discussed this with the patient or family member
- There are four types of histories: (1) problem-focused, (2) expanded problem-focused, (3) detailed, and (4) comprehensive:

##### • **Problem-Focused**

- Chief complaint (CC): The patient's description of why he/she felt the need to see this physician for this visit—could be a sign, symptom, condition, diagnosis or other health-related concern
- Brief history of present illness or concern: The patient's recounting of the date and time (as accurately as possible) of the onset and progress of the chief complaint, including first sign and/or symptom, as well as anatomical location, severity, timing, circumstances, modifying factors, and related signs and/or symptoms

##### • **Expanded Problem-Focused**

- Chief complaint (same as above)
- Brief history of present illness or concern (same as above)
- **System Review:** Pertains only to that system directly related to the chief complaint or present illness:
  - signs/symptoms: fever, weight loss, etc.
  - eyes
  - ears, nose, mouth, throat
  - cardiovascular
  - respiratory
  - gastrointestinal
  - genitourinary
  - musculoskeletal
  - integumentary: skin and/or breast
  - neurological
  - psychiatric
  - endocrine
  - hematologic/lymphatic
  - allergic/immunologic

##### • **Detailed**

- Chief complaint (same as above)
- **Extended history of present illness or concern**—brief history expanded upon to include pertinent **past** family and/or social history directly related to the chief complaint or present illness:

- prior major illnesses and injuries
- prior surgical procedures
- prior hospitalizations
- current medications and/or vitamin/supplements
- allergies (drug, food, inhalant, etc.)
- immunization status (age-appropriate)
- dietary/nutritional status (feeding, eating, etc.)

##### • **Family history** includes:

- health status (or cause of death) of parents, siblings and children
- specific diseases of family members related to problems identified in chief complaint, history of present illness (HPI), and/or system review
- diseases of family members that may be hereditary or place the patient at risk

##### • **Social history** includes:

- marital status and/or living arrangements
- current employment
- occupational history
- use of drugs, alcohol and/or tobacco
- level of education
- sexual history
- other relevant social factors

##### • **System Review:** Review of systems directly related to the chief complaint or present illness **PLUS** a limited history of additional related systems:

- signs/symptoms: fever, weight loss, etc.
- eyes
- ears, nose, mouth, throat
- cardiovascular
- respiratory
- gastrointestinal
- genitourinary
- musculoskeletal
- integumentary: skin and/or breast
- neurological
- psychiatric
- endocrine
- hematologic/lymphatic
- allergic/immunologic

##### • **Comprehensive\***

- Chief complaint
- Extended history of present illness or concern
- Complete past, family and/or social history
- **System Review:** Review of systems directly related to the history of the present illness **PLUS** a history related to **all** body systems—as the name implies, this is the most complete form of history
  - signs/symptoms: fever, weight loss, etc.
  - eyes
  - ears, nose, mouth, throat
  - cardiovascular
  - respiratory
  - gastrointestinal

# Evaluation And Management Coding Guidelines 22

**J Spring**



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