

## 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<br>(Based on 2 of 3<br>Elements of MDM) | Number and Complexity of Problems<br>Addressed   | Amount and/or Complexity of Data to be Reviewed and Analyzed<br><i>*Each unique test, order, or document contributes to the combination of 2 or<br/>combination of 3 in Category 1 below</i>   | Risk of Complications and/or Morbidity or Mortality of<br>Patient Management   |
|----------------|--|--|--|--|
| 99211          | N/A  | N/A  | N/A  | N/A  |
| 99202<br>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><br><i>Examples only:</i> <ul style="list-style-type: none"> <li>• Rest</li> <li>• Superficial dressings</li> </ul>  |
| 99203<br>99213 | Low  | <b>Low</b> <ul style="list-style-type: none"> <li>• 2 or more self-limited or minor problems;<br/>or</li> <li>• 1 stable chronic illness;<br/>or</li> <li>• 1 acute, uncomplicated illness or injury<br/>or</li> <li>• 1 stable, acute illness;<br/>or</li> <li>• 1 acute, uncomplicated illness or injury requiring hospital inpatient or observation level of care</li> </ul>  | <b>Limited</b><br><i>(Must meet the requirements of at least 1 of 2 categories)</i><br><b>Category 1: Tests and documents</b><br><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><br><b>Category 2: Assessment requiring an independent historian(s)</b><br><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><br><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<br>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><br><i>(Must meet the requirements of at least 1 out of 3 categories)</i><br><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><br><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><br><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><br><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<br>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><br><i>(Must meet the requirements of at least 2 out of 3 categories)</i><br><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><br><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><br><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><br><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> |