LEVEL 4 REFERENCE CARD

99214 MAJOR CRITERIA (document 2 of 3 of the following)
1. Detailed history (document all 3 of the following)
   HPI: at least 4 elements for acute problems, or updates on at least 3 chronic/inactive problems
   ROS: 2 to 9 systems or body areas
   PFSH: 1 element
2. Detailed physical exam: 12 bulleted elements from at least 2 systems or body areas (see reverse side of card)
3. Medical decision making of moderate complexity (document 2 of 3 of the following)

A. Diagnosis and management (3 points needed)

<table>
<thead>
<tr>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Self-limited or minor problem (such as cold, insect bite or tinea) (max. of 2)</td>
</tr>
<tr>
<td>1</td>
<td>Established problem, stable/improved (no max.)</td>
</tr>
<tr>
<td>2</td>
<td>Established problem, uncontrolled/worse (no max.)</td>
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<tr>
<td>3</td>
<td>New problem, no further work-up (max. of 1)</td>
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<tr>
<td>4</td>
<td>New problem, further work-up needed</td>
</tr>
</tbody>
</table>

B. Data (3 points needed)

<table>
<thead>
<tr>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Review/order lab(s) (CPT 80002-89399)</td>
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<tr>
<td>1</td>
<td>Review/order radiology service(s) (CPT 70010-79999)</td>
</tr>
<tr>
<td>1</td>
<td>Review/order medical diagnostic study(s) (CPT 90701-99199)</td>
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<tr>
<td>1</td>
<td>Discuss test/study with performing physician</td>
</tr>
<tr>
<td>1</td>
<td>Make decision to obtain old records</td>
</tr>
<tr>
<td>2</td>
<td>Review and summarize old records, or obtain history from someone other than patient</td>
</tr>
<tr>
<td>2</td>
<td>Directly visualize and independently interpret an image, tracing or specimen</td>
</tr>
</tbody>
</table>

C. Risk (“moderate risk” needed; any of the following examples qualify)

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescription drug management (e.g., new prescription or continuation of old prescription)</td>
</tr>
<tr>
<td>Chronic illness with mild exacerbation, progression or side effect</td>
</tr>
<tr>
<td>Two or more stable chronic illnesses</td>
</tr>
<tr>
<td>Undiagnosed new problem with uncertain prognosis (e.g., breast lump)</td>
</tr>
<tr>
<td>Acute illness with systemic symptoms (e.g., pyelonephritis, pneumonitis or colitis)</td>
</tr>
<tr>
<td>Acute complicated injury (e.g., concussion)</td>
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<tr>
<td>Stress test</td>
</tr>
<tr>
<td>Diagnostic endoscopy without risk factors</td>
</tr>
<tr>
<td>Minor surgery with identified risk factors</td>
</tr>
<tr>
<td>IV fluids with additives</td>
</tr>
<tr>
<td>Closed treatment of fracture or dislocation without manipulation</td>
</tr>
</tbody>
</table>

99214 vs. 99204

For 99214 and the new-patient visit code 99204, the medical decision making and HPI requirements are the same. However, 99214 requires a detailed history and physical exam while 99204 requires a comprehensive history and physical exam, and 99214 requires only two of the three major criteria while 99204 requires all three of the major criteria. These differences are summarized below.

<table>
<thead>
<tr>
<th>Element</th>
<th>99214</th>
<th>99204</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major criteria (history, physical exam, medical decision making)</td>
<td>2 of 3</td>
<td>3 of 3</td>
</tr>
<tr>
<td>ROS (part of history)</td>
<td>2</td>
<td>10</td>
</tr>
<tr>
<td>PFSH (part of history)</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Physical exam</td>
<td>12 bullets from at least 2 systems</td>
<td>18 bullets from at least 9 systems</td>
</tr>
</tbody>
</table>

continued
General Multisystem Examination

Constitutional
- Check vitals: 3 of 7 (BP/s-BP/pulse/resp/temp/wt/ht)
- Inspect general appearance

Eyes
- Inspect conjunctivae and lids
- Examine pupils and irises
- Examine optic discs and posterior segments

Ears, Nose, Mouth and Throat
- Assess external appearance of ears and nose
- Examine exterior auditory canals and tympanic membranes
- Assess hearing
- Inspect nasal mucosa, septum and turbinates
- Inspect lips, teeth and gums
- Examine oropharynx: oral mucosa, salivary glands, hard and soft palates, tongue, tonsils and posterior pharynx

Neck
- Examine neck
- Examine thyroid

Respiratory
- Assess respiratory efforts
- Conduct chest percussion
- Palpate chest
- Auscultate lungs

Cardiovascular
- Palpate heart
- Auscultate heart with notations of abnormal sounds and murmurs
- Examine carotid arteries
- Examine abdominal aorta
- Examine femoral arteries
- Examine pedal pulses
- Assess extremities for edema/varicosities

Chest (breasts)
- Inspect breasts
- Palpate breasts and axillae

GI (abdomen)
- Examine abdomen with notation of presence of masses or tenderness
- Examine liver and spleen
- Determine presence or absence of hernia
- Examine anus, perineum and rectum including sphincter tone, presence of hemorrhoids and rectal masses
- Obtain stool sample for occult blood testing

Genitourinary – Male
- Examine scrotal contents
- Examine penis
- Conduct digital rectal exam of prostate gland

Genitourinary – Female
Conduct pelvic exam, which may include examination of the following:
- External genitalia and vagina
- Urethra
- Bladder
- Cervix
- Uterus
- Adnexa/parametria

Lymphatic
- Palpate lymph nodes in at least two areas:
  - Neck
  - Axillae
  - Groin
  - Other

Musculoskeletal
- Examine gait and station
- Inspect/palpate digits and nails
- Examine joints, bones and muscles of at least one of the following: 1) head and neck; 2) spine, ribs and pelvis; 3) right upper extremity; 4) left upper extremity; 5) right lower extremity; and 6) left lower extremity. Examination of a given area may include the following:
  - Inspect/palpate
  - Assess range of motion
  - Assess stability
  - Assess muscle strength and tone

Skin
- Inspect skin and subcutaneous tissue
- Palpate skin and subcutaneous tissue

Neurologic
- Test cranial nerves with notation of deficits
- Examine deep tendon reflexes (note pathological reflexes)
- Examine sensation

Psychiatric
- Describe patient’s judgment and insight
- Assess orientation to time, place and person
- Assess recent and remote memory
- Assess mood and affect

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