**THE 1997 EVALUATION AND MANAGEMENT GUIDELINES AT A GLANCE**

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**KEY TO ABBREVIATIONS**

**ASSMT:** Assessment  
**C:** Comprehensive  
**D:** Detailed  
**EPF:** Expanded problem-focused  
**EX:** Examination  
**HC:** High complexity  
**HPI:** History of the present illness  
**INSP:** Inspection  

**LC:** Low complexity  
**MC:** Moderate complexity  
**PALP:** Palpation  
**PF:** Problem-focused  
**PFSH:** Past, family and social history  
**ROS:** Review of systems  
**S:** Straightforward  

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**NEW PATIENT**

<table>
<thead>
<tr>
<th>Code</th>
<th>History</th>
<th>Exam</th>
<th>Decision Making</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>99201</td>
<td>PF</td>
<td>PF</td>
<td>S</td>
<td>10 min.</td>
</tr>
<tr>
<td>99202</td>
<td>EPF</td>
<td>EPF</td>
<td>S</td>
<td>20 min.</td>
</tr>
<tr>
<td>99203</td>
<td>D</td>
<td>D</td>
<td>LC</td>
<td>30 min.</td>
</tr>
<tr>
<td>99204</td>
<td>C</td>
<td>C</td>
<td>MC</td>
<td>45 min.</td>
</tr>
<tr>
<td>99205</td>
<td>C</td>
<td>C</td>
<td>HC</td>
<td>60 min.</td>
</tr>
</tbody>
</table>

**3 of 3 required**

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**ESTABLISHED PATIENT**

<table>
<thead>
<tr>
<th>Code</th>
<th>History</th>
<th>Exam</th>
<th>Decision Making</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>99211</td>
<td>—</td>
<td>—</td>
<td>—</td>
<td>5 min.</td>
</tr>
<tr>
<td>99212</td>
<td>PF</td>
<td>PF</td>
<td>S</td>
<td>10 min.</td>
</tr>
<tr>
<td>99213</td>
<td>EPF</td>
<td>EPF</td>
<td>S</td>
<td>10 min.</td>
</tr>
<tr>
<td>99214</td>
<td>D</td>
<td>D</td>
<td>MC</td>
<td>25 min.</td>
</tr>
<tr>
<td>99215</td>
<td>C</td>
<td>C</td>
<td>HC</td>
<td>40 min.</td>
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</tbody>
</table>

**2 of 3 required**

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**History**

<table>
<thead>
<tr>
<th>HPI elements</th>
<th>ROS systems</th>
<th>PFSH elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF 1-3</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>EPF</td>
<td>1</td>
<td>—</td>
</tr>
<tr>
<td>D &gt; 3 (OR 3 or more chronic diseases)</td>
<td>2-9</td>
<td>1</td>
</tr>
<tr>
<td>C</td>
<td>&gt; 9</td>
<td>2 (estab.) 3 (new)</td>
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</tbody>
</table>

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**Exam**

<table>
<thead>
<tr>
<th>Systems/Areas</th>
<th>Bulleted elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF</td>
<td>1+</td>
</tr>
<tr>
<td>EPF</td>
<td>1+</td>
</tr>
<tr>
<td>D</td>
<td>2+</td>
</tr>
<tr>
<td>C</td>
<td>9+</td>
</tr>
</tbody>
</table>

**Note:** For the comprehensive exam, all bulleted elements in the 9+ systems/areas examined must be performed.

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**General Multisystem Exam**

**CONSTITUTIONAL**

- Any three vital signs
- General appearance of patient

**EYES**

- INSP of conjunctivae & lids
- EX of pupils & irises
- Ophthalmoscopic EX of optic discs & posterior segments

**EARS, NOSE, MOUTH & THROAT**

- External INSP of ears & nose
- Ex of conjunctivae & lids
- Ophthalmoscopic EX of optic discs & posterior segments
- ASSMT of hearing
- INSP of nasal mucosa, septum & turbinates
- INSP of lips, teeth & gums
- EX of oropharynx: oral mucosa, salivary glands, hard & soft palates, tongue, tonsils & posterior pharynx

**NECK**

- EX of neck
- EX of thyroid

**RESPIRATORY**

- ASSMT of respiratory effort
- Percussion of chest
- PALP of chest
- Auscultation of lungs

**CARDIOVASCULAR**

- PALP of heart
- Auscultation of heart with notation of abnormal sounds & murmurs

**CHEST (BREASTS)**

- INSP of breasts
- PALP of breasts & axillae

**GASTROINTESTINAL (ABDOMEN)**

- EX of abdomen with notation of presence of masses or tenderness
- EX of liver & spleen

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### Decision making

<table>
<thead>
<tr>
<th>Dx/Mx options score</th>
<th>Data score</th>
<th>Risk</th>
</tr>
</thead>
<tbody>
<tr>
<td>S 1 (minimal)</td>
<td>1 (minimal/none)</td>
<td>Minimal</td>
</tr>
<tr>
<td>LC 2 (limited)</td>
<td>2 (limited)</td>
<td>Low</td>
</tr>
<tr>
<td>MC 3 (multiple)</td>
<td>3 (moderate)</td>
<td>Moderate</td>
</tr>
<tr>
<td>HC 4 (extensive)</td>
<td>4 (extensive)</td>
<td>High</td>
</tr>
</tbody>
</table>

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### Quantifying risk of complications, morbidity, mortality

<table>
<thead>
<tr>
<th>Risk Level</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Minimal   | Problems: One self-limited/minor problem  
Dx procedures: Venipuncture, CXR, EKG, UA, US, echo, KOH prep  
Mx options: Rest, gargles, elastic bandages, superficial dressings |
| Low       | Problems: >1 self-limited/minor problem, one stable chronic illness, acute uncomplicated illness/injury  
Dx procedures: Pulmonary function tests, barium enema, superficial needle biopsy, arterial puncture, skin biopsy  
Mx options: OTC drugs, minor surgery (no risk factors), PT, OT, IV fluids w/o additives |
| Moderate  | Problems: >1 chronic illnesses w/ mild Rx side effects; >1 stable chronic illness; new problem, no Dx, (e.g., breast lump); acute illness w/ systemic Sx (e.g., pyelonephritis); acute complicated injury (e.g., head injury w/ brief loss of consciousness)  
Dx procedures: Cardiac stress test, fetal contraction stress test, Dx endoscopy w/ no risk factors, deep needle or incisional biopsy, arteriogram, lumbar puncture, thoracentesis  
Mx options: Minor surgery w/ risk factors, Rx drugs, IV fluids w/ additives, closed Mx of fracture/dislocation w/o manipulation |
| High      | Problems: >1 chronic illnesses w/ severe Rx side effects; potentially life-threatening problems (e.g., acute MI, progressive severe RA, potential threat of suicide); abrupt neuro. change (e.g., seizure, TIAs, weakness or sensory loss)  
Dx procedures: Dx endoscopy w/ risk factors  
Mx options: Parenteral controlled substances, Rx needing intensive monitoring for toxicity, DNR decision |

**Note:** For a more complete table of risks, see Medicare’s “Documentation Guidelines for Evaluation and Management Services” at http://go.cms.gov/p1QFP5.