

THE 1997 EVALUATION AND MANAGEMENT GUIDELINES AT A GLANCE

New Patient

Code	History	Exam (see page 2)	Decision Making	Time
99201	PF	PF	S	10 min.
99202	EPF	EPF	S	20 min.
99203	D	D	LC	30 min.
99204	C	C	MC	45 min.
99205	C	C	HC	60 min.
3 of 3 required				

Established Patient

Code	History	Exam (see page 2)	Decision Making	Time
99211	—	—	—	5 min.
99212	PF	PF	S	10 min.
99213	EPF	EPF	LC	15 min.
99214	D	D	MC	25 min.
99215	C	C	HC	40 min.
2 of 3 required				

History

	HPI elements	ROS systems	PFSH elements
PF	1-3	—	—
EPF		1	—
D	> 3 (OR 3 or more chronic diseases)	2-9	1
C		> 9	2 (estab.) 3 (new)
3 of 3 required			

HPI: Location, Quality, Severity, Duration, Timing, Context, Modifying factors, Associated signs and symptoms OR Status of chronic diseases

ROS: Constitutional, Eyes, ENT/mouth, Cardiovascular, Respiratory, GI, GU, Musculoskeletal, Skin/breasts, Neurologic, Psychiatric, Endocrine, Hematologic/lymphatic, Allergic/immuno

PFSH: Past, Family, Social history

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

Decision making

	Dx/Mx options score	Data score	Risk
S	1 (minimal)	1 (minimal/none)	Minimal
LC	2 (limited)	2 (limited)	Low
MC	3 (multiple)	3 (moderate)	Moderate
HC	4 (extensive)	4 (extensive)	High
2 of 3 required			

Quantifying risk of complications, morbidity, mortality

Risk Level	Examples
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, TIA, 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>.



FPM Toolbox To find more practice resources, visit <https://www.aafp.org/fpm/toolbox>.

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Exam

	Systems/Areas	Bulleled elements
PF	1+	1-5
EPF	1+	6-11
D	2+	12+
C	9+	18+

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

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
- Otoscopic EX of external auditory canals & tympanic membranes
- 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

EX of:

- Carotid arteries
- Abdominal aorta
- Femoral arteries
- Pedal pulses
- Extremities for edema &/or varicosities

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
- EX for presence or absence of hernia

- EX of anus, perineum & rectum, including sphincter tone, presence of hemorrhoids & rectal masses
- Obtain stool sample for occult blood test when indicated

GENITOURINARY (MALE)

- EX of the scrotal contents
- EX of the penis
- Digital rectal EX of prostate gland

GENITOURINARY (FEMALE)

Pelvic EX, including:

- External genitalia & vagina
- Urethra (masses, tenderness, scarring)
- Bladder
- Cervix
- Uterus
- Adnexa/parametria

LYMPHATIC

PALP of lymph nodes in two or more areas:

- Neck
- Axillae
- Groin
- Other

MUSCULOSKELETAL

- EX of gait & station
- INSP &/or PALP of digits & nails

EX of joint(s), bone(s) & muscle(s) of one or more of the following six areas: 1) head & neck; 2) spine, ribs & pelvis; 3) right upper extremity; 4) left upper extremity; 5) right lower extremity; & 6) left lower extremity. The EX of a given area includes:

- INSP &/or PALP with notation of presence of any misalignment, asymmetry, crepitation, defects, tenderness, masses or effusions
- ASSMT of range of motion with notation of any pain, crepitation or contracture
- ASSMT of stability with notation of any dislocation, subluxation or laxity
- ASSMT of muscle strength & tone with notation of any atrophy or abnormal movements

SKIN

- INSP of skin & subcutaneous tissue
- PALP of skin & subcutaneous tissue

NEUROLOGIC

- Test cranial nerves with notation of any deficits
- EX of deep tendon reflexes with notation of pathological reflexes
- EX of sensation

PSYCHIATRIC

- Description of patient's judgment & insight

Brief ASSMT of mental status, including:

- Orientation to time, place & person
- Recent & remote memory
- Mood & affect