THE 1997 EVALUATION AND MANAGEMENT GUIDELINES AT A GLANCE

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, social history
PPFSH: Past, family, social history
ROS: Review of systems
S: Straightforward

**History**

<table>
<thead>
<tr>
<th>Code</th>
<th>History</th>
<th>Exam (see page 2)</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>
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<tr>
<td>99203</td>
<td>D</td>
<td>D</td>
<td>LC</td>
<td>30 min.</td>
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<tr>
<td>99204</td>
<td>C</td>
<td>C</td>
<td>MC</td>
<td>45 min.</td>
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<tr>
<td>99205</td>
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<td>C</td>
<td>HC</td>
<td>60 min.</td>
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</table>

**Decision making**

<table>
<thead>
<tr>
<th>Code</th>
<th>History</th>
<th>Exam (see page 2)</th>
<th>Decision Making</th>
<th>Time</th>
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</thead>
<tbody>
<tr>
<td>99211</td>
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<td>—</td>
<td>—</td>
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<tr>
<td>99212</td>
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<td>PF</td>
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<td>99213</td>
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<td>EPF</td>
<td>LC</td>
<td>15 min.</td>
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<tr>
<td>99214</td>
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<td>D</td>
<td>MC</td>
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<tr>
<td>99215</td>
<td>C</td>
<td>C</td>
<td>HC</td>
<td>40 min.</td>
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</tbody>
</table>

**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, 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 |

**FPM Toolbox**

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

Note: For a more complete table of risks, see Medicare’s “Documentation Guidelines for Evaluation and Management Services” at http://go.cms.gov/p1QFPS.
Exam

<table>
<thead>
<tr>
<th>Systems/Areas</th>
<th>Bulleted elements</th>
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</thead>
<tbody>
<tr>
<td>PF</td>
<td>1+ 1-5</td>
</tr>
<tr>
<td>EPF</td>
<td>1+ 6 -11</td>
</tr>
<tr>
<td>D</td>
<td>2+ 12+</td>
</tr>
<tr>
<td>C</td>
<td>9+ 18+</td>
</tr>
</tbody>
</table>

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, crepititation, defects, tenderness, masses or effusions
  - ASSMT of range of motion with notation of any pain, crepititation 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