



## New Patient 99202 Documentation Requirements

### When reporting for telemedicine

- Modifier -95 may be required depending on the payer
- Place of service is 2, which also may vary by payer

### 99202 - Office or other outpatient visit for the evaluation and management of a new patient, which requires these three components:

- An expanded problem focused history
- An expanded problem focused examination
- Straightforward medical decision making

Usually the presenting problem(s) are of low to moderate severity.

1. ☐ The physician signature is identifiable. If EHR, the physician signature is secure and a signature protocol is available for review.
2. ☐ Each page of the printed or copied record includes patient's name, chart number or other patient identification.

### History

3. ☐ Chief complaint
4. ☐ 1 to 3 elements listed below to meet the history of the present illness requirement

|                  |                               |
|------------------|-------------------------------|
| Location         | Timing                        |
| Context          | Quality                       |
| Modifying factor | Severity                      |
| Duration         | Associated signs and symptoms |

5. ☐ Only the system in the HPI must be documented and reviewed

|                           |                      |
|---------------------------|----------------------|
| Eyes                      | Gastrointestinal     |
| Constitutional            | Genitourinary        |
| Ears, nose, mouth, throat | Integumentary        |
| Cardiovascular            | Neurological         |
| Respiratory               | Musculoskeletal      |
| Hematologic/Lymphatic     | Allergic/Immunologic |
| Psychiatric               | Endocrine            |



6. Documentation of the following only as medically necessary or for MIPS reporting.

- ☐ Past history
- ☐ Family history
- ☐ Social history

### Examination

7. ☐ Six to eight of the following 12 elements of the exam are performed

|                             |                  |                      |
|-----------------------------|------------------|----------------------|
| Visual acuity               | Ocular adnexa    | Lens                 |
| Confrontation visual fields | Pupil and iris   | Intraocular pressure |
| Extraocular motility        | Cornea           | Optic nerve discs    |
| Conjunctiva                 | Anterior chamber | Retina and vessels   |

8. ☐ Mental assessment not required. Dilation is not required.

### Medical Decision Making

9. What is the diagnosis? \_\_\_\_\_

10. ☐ The ICD-10 code reflects the highest level of specificity

11. Must meet one of the following criteria:

- ☐ New problem to examiner: stable, improved or worsening
- ☐ Clinical lab test(s): ordered or reviewed
- ☐ Radiology tests: ordered or reviewed
- ☐ Other diagnostic tests: ordered or reviewed
- ☐ Review of old records and/or additional history from other than the patient

12. Must meet one of the two categories:

| Presenting Problem(s)   | Management Options Selected  |
|---|--|
| <ul style="list-style-type: none"><li>• One self-limited or minor problem</li></ul> | <ul style="list-style-type: none"><li>• Bandage or superficial dressing</li><li>• Observation</li><li>• Home care instructions, i.e. warm compresses, lid scrubs</li></ul> |