

Dictation Template for Observation H&P

- Patient's Name
- Medical Record Number
- Date of Service

Chief Complaint – Reason for visit in patient's words

History of Present Illness – Chronological description of patient's present illness/injury

Location	Timing	Duration	Quality	
Severity		Context	Modifying Factors	Associated Signs & Symptoms

- Document when you are unable to obtain history due to patient's clinical condition/acuity and/or mental status

Levels	99234 or 99218	99235, 99236, 99219 or 99220
History of Present Illness	Detailed - Four or more elements	Comprehensive – Four or more elements

Review of Systems

Constitutional	Eyes	ENT	Cardiovascular	Respiratory
Gastrointestinal	Genitourinary	Musculoskeletal	Integumentary	Neurological
Psychiatric	Endocrine	Hematologic/Lymphatic	Allergic/Immunologic	

- Listing positives and pertinent negatives individually and a notation indicating all other systems have been reviewed and are negative is permissible when all (14) systems have been reviewed. Stating the total number of systems reviewed is an appropriate alternative. Document when you are unable to obtain history due to a patient's clinical condition/acuity and/or mental status.

Levels	99234 or 99218	99235, 99236, 99219 or 99220
Review of Systems	Detailed – 2-9 systems	Comprehensive – 10 or more systems

Past/Family/Social History

- Past: Major medical illnesses, current medications, surgical procedures
- Family: Cardiovascular disease, cancer, DM, High BP
- Social: Marital status, employment, education, tobacco/alcohol/drug. Everyone has a social history.

Levels	99234 or 99218	99235, 99236, 99219 or 99220
Past medical, family, social history	One item from any area	One item from all three areas

Physical Exam

- Document specific findings of organ systems or body areas pertinent to the chief complaint.
- "Negative" or "normal" is sufficient to document normal findings to unaffected area(s) or asymptomatic organ system(s). However, it is preferable to list the pertinent negative items for that organ system or body area.
- Each of the following body areas BA/organ systems (OS) contain several items.

Body areas	Head Including face	Abdomen	Chest including breast/axillae	Organ Systems	Constitutional (vitals, general appearance)	Hematologic/ Lymphatic/Immunologic	ENT	Cardiovascular
	Neck	Back	Each extremity		Respiratory	Skin	Neurologic	Gastrointestinal
	Genitalia, groin, buttocks including spine				Genitourinary	Musculoskeletal	Psychiatric	Eyes

Levels	99234 or 99218	99235, 99236, 99219 or 99220
Physical Exam	5-7 Body Areas or Organ Systems	8+ Organ Systems Only

Medical Decision Making

- Differential diagnosis
- Results & Interpretations of lab tests, EKG, x-rays
- Comorbid/complicating factors
- Rationale for treatment, management and disposition decisions
- Reason for Observation status

Observation Course

- Treatment response
- Re-evaluations
- Consultations
- Medical records review: old charts, nursing notes, EMS run sheet

Critical Care

- Describe the critical conditions that could result in your patient's deterioration
- Note interventions and patient's response
- Document critical care time; excluding time spent performing other procedures

Clinical Impressions – Properly sequence according to urgency

Disposition - ● Condition on Discharge ● Follow-up plan & patient education

Dictation Template for Observation Subsequent Care

● Patient's Name

● Medical Record Number

● Date of Service

Chief Complaint – Reason for visit in patient's words

History of Present Illness – Interval history (see interval history definition in NOTE below)

Chronological description/update of patient's present illness/injury from the last encounter.

Levels	99224 and 99225	99226
History of Present Illness	Problem & Expanded Problem Focused – 1-3 Elements	Detailed – Four or more elements

Review of Systems – Document as necessary

Constitutional	Eyes	ENT	Cardiovascular	Respiratory
Gastrointestinal	Genitourinary	Musculoskeletal	Integumentary	Neurological
Psychiatric	Endocrine	Hematologic/Lymphatic	Allergic/Immunologic	

Levels	99224	99225	99226
Review of Systems	Problem Focused-0 Systems	Expanded Problem Focused – 1 system	Detailed – 2-9 systems

Past/Family/Social History – Document as necessary

Physical Exam

- Document specific findings of organ systems or body areas pertinent to the chief complaint.
- “Negative” or “normal” is sufficient to document normal findings to unaffected area(s) or asymptomatic organ system(s). However, it is preferable to list the pertinent negative items for that organ system or body area.
- Each of the following body areas (BA)/organ systems (OS) contain several items.

Body areas	Head Including face	Abdomen	Chest including breast/axillae	Organ Systems	Constitutional (vitals, general appearance)	Hematologic/ Lymphatic/Immunologic	ENT	Cardiovascular
	Neck	Back	Each extremity		Respiratory	Skin	Neurologic	Gastrointestinal
	Genitalia, groin, buttocks including spine				Genitourinary	Musculoskeletal	Psychiatric	Eyes

Levels	99224	99225	99226
Physical Exam	Problem Focused- 1 BA or organ system	Expanded problem Focused- 2-4 BA or Organ Systems	Detailed- 5-7 BA or Organ systems

Medical Decision Making

- Differential diagnosis
- Rationale for treatment, management and disposition decisions
- Treatment response
- Medical records review: old charts, nursing notes
- Results & Interpretations of lab tests, EKG, x-rays
- Re-evaluations
- Consultations
- Comorbid/complicating factors
- Reason for Observation status

Critical Care

- Describe the critical conditions that could result in your patient's deterioration
- Note interventions and patient's response
- Document critical care time; excluding time spent performing other procedures

Clinical Impressions – Properly sequence according to urgency

NOTE: Two of the three key components must meet or exceed documentation requirements.

- This does not mean that a key component can be omitted only that it does not have meet documentation requirements.
- For example, 99226 requires 4 HPI elements; however, if the PE and MDM are complete the HPI would be acceptable with only 2 elements.
- **Interval history(CMS MAC):**
 - It is not necessary to record information about the PFSH for subsequent observation.
 - Document an update on the status of the patient from the last encounter. It may be a simple statement like ‘no complaint of SOB,’ or ‘complains of chest pain.’

Dictation Template for Observation Discharge Summary

● Patient's Name

● Medical Record Number

● Date of Service

Chief Complaint – Reason for visit in patient's words

Physical Exam- This is a required component of the observation discharge. There is not a set amount of elements to document. **Final examination at a minimum should address the affected/symptomatic system.**

- "Negative" or "normal" is sufficient to document normal findings to **unaffected area(s)** or asymptomatic organ system(s). However, it is preferable to list the pertinent negative items for that organ system or body area.

Body areas	Head including face	Abdomen	Chest including breast/axillae
	Neck	Back	Each extremity
	Genitalia, groin, buttocks including spine		

Organ Systems	Constitutional (vitals, general appearance)	Hematologic/Lymphatic/Immunologic	ENT	Cardiovascular
	Respiratory	Skin	Neurologic	Gastrointestinal
	Genitourinary	Musculoskeletal	Psychiatric	Eyes

Discussion of the hospital stay

Instructions for continuing care

Preparation of discharge records