E&M Guideline Updates

The CMS guidelines for E&M coding will take effect January 1st, 2021. These revisions focus more on the complexity of the visit and what is discussed with the patient than in the past. In addition to this, the 99201 CPT code will no longer be an active procedure code. To better prepare yourself and avoid issues with billing, be sure to read about these revisions and changes from AMA at the link below:

https://www.ama-assn.org/topics/cpt-evaluation-and-management-em-codes

This guide/document will outline the necessary changes that need to be made within your software(s). Please locate the software your office utilizes below and make the suggested modifications to prepare for the 2021 changes. If you need assistance with any of the below steps, please call Complete Healthcare Solutions, Inc at 800-250-8687. Please note that support may be billable and will be determined at the time of the call.

Lytec

Edit Superbill

The 99201 CPT code will need to be removed from the printed Superbill. Go to Reports > Custom Reports > Design Custom Report. In the Lytec Report Designer window, go to File > Edit Custom Report and then select your superbill form. Click Open. Locate the 99201 code and remove it and the description. Click the Save Icon.

Inactivate Transaction Code

To Inactivate the Transaction code, go to Lists > Transaction Code. Search for the 99201 Transaction code. Click the "Inactive" check box in the lower right corner of the screen and Save.

Medisoft

Edit Superbill

The 99201 CPT code must be removed from the printed Superbill. Go to Reports > Design Custom Reports and Bills. In the Medisoft Report Designer window, go to File > Open Report and then select your superbill form. Click OK. Locate the 99201 code and remove it and the description. Click the Save Icon.

Inactivate Procedure Code

To inactivate the Procedure code, go to Lists > Procedure/Payment/Adjustment code. Search for 99201 and click Edit. Select the Inactive box at the top of the screen and Save.

Practice Partner Medical Billing

Edit Encounter Form

To remove the CPT code 99201 from your printed encounter form, go to Maintenance > Templates > Form Templates > Encounter Forms. Edit your encounter form. Click OK on first screen. Locate the 99201 information and remove it from the form. You can preview and validate to make sure it is correct and then click OK to save.

UnifiMD

Inactivate Procedure Codes

To inactivate the 99201 procedure code, go to Dictionaries > Coding > Procedure Codes. Search for the code and double click to edit. Click Inactive and Save.

Remove Note Code

To remove 99201 as an option from the Notes, go to Guides > Note Guides > Common Notes > Note Codes. Locate the note code for 99201 and highlight it. Click Delete to remove the code from your list.

Practice Partner Patient Records, Lytec MD, or Medisoft Clinical

Inactivate Procedure Code

To inactivate the 99201 procedure code, go to Maintenance > Tables > Procedure Codes. Search for 99201 and click Edit. Change the status to Inactive.

Remove code from EEF Template

To remove 99201 from your EEF Template, go to Maintenance > Templates > Electronic Encounter Form Templates > Electronic Encounter Templates. Select your office template and click edit. Locate 99201 on the right side, select and click Remove.

Edit/Add Quick Text

Any quick texts that have the 99201 will need to be updated. Go to Task > Quick Text and search for the quick text that needs to be edited. Click Edit and remove 99201 information.

Since the new dot codes have different levels of severity, adding a pick list quick text with the information will make documentation easier. Go to Task > Quick Text and select new to add the code. Two groups of severity levels will need to be created as one of the E&M codes has different level names. For the .EMP (number and complexity of problems addressed) and .EMR (Risk of Complications and/or morbidity or mortality of patient management)dot codes, the quick text levels need to be: N/A, Minimal, Low, Moderate, High. For the .EMD (Amount and/or Complexity of Data to be Reviewed and Analyzed) dot code, the quick text levels need to be N/A, Minimal, Limited, Moderate, Extensive.

Here is the recommended Quick Text pick list for .EMP and .EMR:

EMSeverity01 – N/A

EMSeverity02 - Minimal

EMSeverity03 - Low

EMSeverity04 – Moderate

EMSeverity05 - High
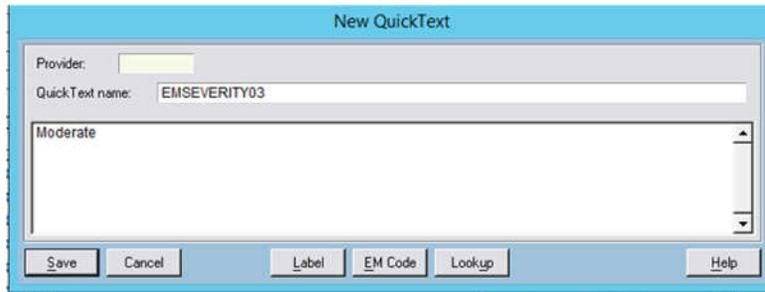
Here is the recommended Quick Text pick list for .EMD:

EMDSeverity01 – N/A

EMDSeverity02 – Minimal

EMDSeverity03 – Limited

EMDSeverity04 - Moderate

EMDSeverity05 – Extensive
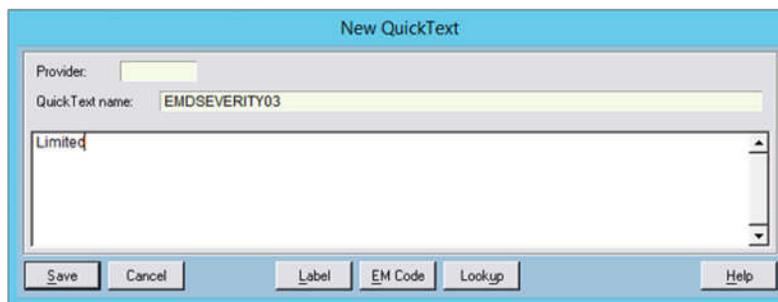
Edit Note Template

To add new dot codes, you will need to edit your note templates. Go to Maintenance > Templates > Note Templates. Click OK. Select template to be edited and click OK. Click Edit on the right side of the screen and then add dot codes to note. Right next to the dot code, add a label marker for the Quick Text Pick List. Go to Insert > Label. Use your cursor to remove the * and replace it with "Severity..." The ellipsis is what creates the pick list. Click Save to save changes.

.EMP: <<Severity...>>

Special Features

To adjust the Special Features to use the 2021 E&M coding regulations, go to Maintenance > Configuration > Special Features

On Records 4 tab, Change E&M Guidelines drop down to "Use 2021 Guidelines only"
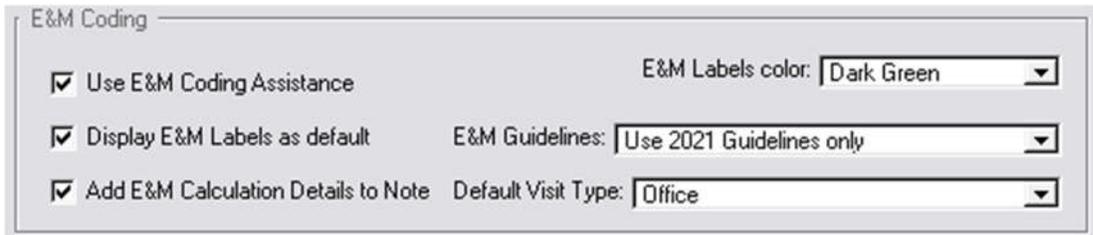
On Records 5 tab, remove 99201 from the Problem List section within "Filter Procedure Codes"
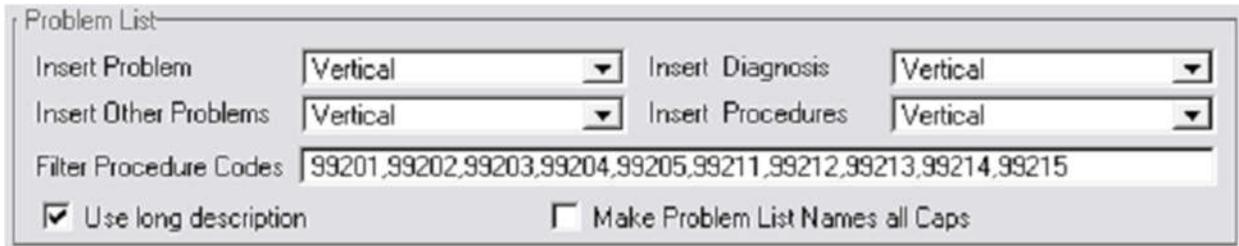
Dot Codes

There are four new dot codes for E&M 2021.

.EMP - number and complexity of problems addressed. The level options are NA, Minimal, Low, Moderate, High.

.EMP: level (.EMP: High)

.EMD - Amount and/or Complexity of Data to be Reviewed and Analyzed. The level options are NA, None (minimal or none), Minimal (minimal or none), Limited, Moderate, Extensive

.EMD: Level (.EMD: Minimal)

.EMR - Risk of Complications and/or morbidity or mortality of patient management. NA, Minimal, Low, Moderate, High

.EMR: Level (.EMR: Low)

.VTS - Supplemental Time. Up to five codes supported in the note

.VTS: time in minutes (.VTS: 40)

E&M Coding Screen

The 2021 E&M Coding screen is broken down into six sections.

Evaluation and Management Coding Result

E&M code for patient based on the following

E&M Code 99214 for Established Patient based on the following:
E&M Code Calculated based on Time using 2021 guidelines

Patient Type
☐ New
☑ Established

Number and Complexity of Problems Addressed ?
- N/A
- Minimal
- **Low**
- Moderate
- High

Amount and/or Complexity of Data to be Reviewed and Analyzed ?
- N/A
- Minimal or None
- Limited
- **Moderate**
- Extensive

Risk of Complications and/or Morbidity or Mortality of Patient Management ?
- N/A
- Minimal Risk
- **Low Risk**
- Moderate Risk
- High Risk

Time based coding elements
☑ Use Total Time   Visit Time (Minutes): 20   Supplemental Time (Minutes): 15   Total Time: 35

OK   Cancel   Original   E&M 1995/1997   Help

1. E&M Code for patient based on the following – Displays CPT code to be inserted into Progress Notes based on dot codes used in Progress Note. If more information is required in the note, the message "E&M code cannot be determined for new/established patient based on the following" will display in this box

2. Patient Type – Select whether the patient is New or Established

3. Number and Complexity of Problems – The level should be adjusted based on what is covered during the visit.

4. Amount and/or Complexity of Data to be Reviewed and Analyzed – The level should be adjusted based on what is covered during the visit.

5. Risk of Complications and/or Morbidity or Mortality of Patient Management - The level should be adjusted based on what is covered during the visit.

6. Time Based coding elements – Time of visit and supplemental time can be entered to calculate total time of visit. Use Total Time will be checked if the .VT or .VTS dot codes are used in the progress note.