

TITLE: Crediting a Prior Review of Systems and/or Past, Family and/or Social History

PURPOSE: This policy serves as a reminder of the documentation guidelines for the Review of Systems (ROS) and Past, Family and/or Social History (PFSH) as stipulated in both the 1995 and 1997 versions of the Centers for Medicare and Medicaid Services (CMS) *Documentation Guidelines for Evaluation and Management Services* (the “Guidelines”). This policy is all the more pertinent as the organization utilizes questionnaires completed by the patient in EPIC’s *MyChart* to satisfy certain components of a patient’s history for an Evaluation and Management (E/M) service. These guidelines are not new; nonetheless, they need to be applied in the electronic health record.

POLICY: A ROS and/or a PFSH obtained during an earlier encounter does not need to be re-recorded if there is evidence that the physician reviewed and updated the previous information. This may occur when a physician updates his or her own record or in an institutional setting or group practice where many physicians use a common record. The review and update may be documented by:

- describing any new ROS and/or PFSH information or noting there has been no change in the information; and
- noting the date and location of the earlier ROS and/or PFSH.

DEFINITIONS:

1. **Crediting** – counting pieces of medical record documentation toward the level of service billed.
2. **MyChart** – a patient portal through EPIC that gives patients online access to their medical record. Through it they can manage appointments, access test results, communicate with their service provider, pay bills, request prescription refills and more.
3. **Past, Family & Social History (PFSH)** - the PFSH consists of a review of three areas: past history (the patient's past experiences with illnesses, operations, injuries and treatments); family history (a review of medical events in the patient's family, including diseases which may be hereditary or place the patient at risk); and social history (an age appropriate review of past and current activities).
4. **Review of Systems (ROS)** – an inventory of body systems obtained through a series of questions seeking to identify signs and/or symptoms which the patient may be experiencing or has experienced

PROCEDURE:

1. Copying and pasting the ROS and/or the PFSH from an earlier encounter will not be credited towards a billable service unless the service provider specifically documents that he or she reviewed the information, the service provider describes any new ROS and/or the PFSH information, or the service provider notates that there has been no change in the information.
2. When a patient provides the information utilized to satisfy the ROS and/or PFSH via a form or electronic questionnaire (e.g., via EPIC's *MyChart*), there must be a notation by the service provider supplementing or confirming the information provided by the patient. Without this confirmation, no credit for the ROS and/or PFSH shall be credited towards a billable service.
3. Copying and pasting a ROS and/or PFSH obtained during a previous encounter into the record for the current encounter, or the transfer of information from EPIC's *MyChart* into the current encounter will not be credited towards a billable service unless the above policy is satisfied.

REFERENCES: CMS. 1995 Documentation Guidelines for Evaluation and Management Services.

CMS. 1997 Documentation Guidelines for Evaluation and Management Services.

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