

1 Patient Information

Name: _____
DOB: _____
Age / Sex: _____
Date of Service: _____
Provider: _____
Visit Type (e.g., Follow-up, Acute, Telehealth): _____

2 Chief Complaint

Document the reason for the encounter or follow-up in concise clinical terms, including duration if applicable...

3 History of Present Illness

INTERVAL CHANGES
Progression since last visit (improving / worsening / stable): _____

SYMPTOM STATUS
Current symptoms, severity, and frequency: _____

RESPONSE TO TREATMENT
Effectiveness of prior interventions, adherence, and side effects: _____

NEW SYMPTOMS OR CONCERNS
Any newly developed issues since last evaluation: _____

PERTINENT NEGATIVES
Explicit denial of key symptoms relevant to condition: _____

4 Review of Systems

Constitutional: _____
Cardiovascular: _____
Respiratory: _____
Gastrointestinal: _____
Neurological: _____
Psychiatric: _____
Other systems as clinically indicated: _____

5 Vitals

Temperature: _____ Heart Rate: _____ Oxygen Saturation: _____
Blood Pressure: _____ Respiratory Rate: _____ Weight (if relevant): _____

6 Physical Examination

General Appearance: _____
HEENT: _____
Cardiovascular: _____
Respiratory: _____
Abdomen: _____
Musculoskeletal: _____
Neurological: _____
Skin: _____
Psychiatric (if applicable): _____

7 Lab & Diagnostic Results

Laboratory findings: _____
Imaging studies: _____
Other diagnostics (ECG, POC testing): _____

8 Assessment

Active diagnoses addressed during the visit. Status of each condition (improving, stable, worsening). Clinical reasoning supporting assessment. Risk level and comorbidities impacting management...

9 Plan

Medication management (initiation, adjustment, continuation, discontinuation). Diagnostic testing ordered. Procedures performed. Patient education and counseling. Referrals or consultations...

10 Follow-Up

Next visit timeframe and purpose: _____
Return earlier if: _____

Total Time Spent: _____

Counseling / Coordination of Care Time: _____

| E/M CODING

E/M Level (e.g., 99213 / 99214 / 99215): _____

Basis for Billing (Time-based / MDM): _____

| ICD-10 CODES

Primary Diagnosis Code + Description: _____

Secondary Diagnosis Code(s): _____

Physician Name, MD: _____

Specialty: _____

Date: _____

Time: _____