

OCCUPATIONAL THERAPY DECISION CHART FOR CPT® EVALUATION CODES BY COMPLEXITY

*Effective 1/1/17

Patient Name: _____ DOB: _____
 Medical Dx: _____
 Treatment Dx: _____

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		OCCUPATIONAL THERAPY				
CPT® Codes	Old Codes	97003			97004	
	New Codes	97165	97166	97167	97168	
	Complexity	Low	Moderate	High	RE-EVAL	
HISTORY (Subjective)		Brief	Expanded	Extensive	N/A	HISTORY (Subjective)
Past Medical and Therapy History for Primary Presenting Problem		Occupational Profile, Medical Hx, Therapy Hx: *Reason for referral *Primary problem *Client goals *Review of Medical Hx, Therapy Hx			For established patient when medically necessary for assessment of change and revised plan of care.	List Profile, Medical Hx, Therapy Hx For Expanded or Extensive, list additional factors
EXAM (Objective)		1-3 Deficits	3-5 Deficits	5+ Deficits	Yes	EXAM (Objective)
Systems Review, Tests and Measures, Measurable Assessment or Functional Outcomes		Performance Deficits *Assessment identifying performance deficits in physical, cognitive or psychosocial skills that result in Activity Limitation or Participation Restriction (see below) *Physical Skills *Cognitive Skills *Psychosocial Skills *Activity Limitation based on systems review: Difficulty or inability to perform what tasks due to abnormal findings in physical, cognitive or psychosocial skills? *Participation Restriction: Problems participating in life situations (i.e.: Inability to care for self, Inability to work)			Re-evaluation should include Tests and Measures, measurable outcomes. Documented change in function and need for revised plan of care.	List Performance Deficits List Activity Limitations List Participation Restrictions
ASSESSMENT MODIFICATION		N/A	N/A	N/A	N/A	Assessment Modifications Needed?
		ASSESSMENT MODIFICATION AND NEED FOR ASSISTANCE TO COMPLETE ASSESSMENT *How much physical assist, verbal assist or other was necessary to complete the assessment None Min to Mod Significant				
Use the Information Above to Determine the Complexity of Clinical Decision Making Below						
CLINICAL DECISION MAKING - COMPLEXITY (Assessment)		LOW	MODERATE	HIGH	RE-EVAL	Clinical Decision Making - Determines Complexity (Assessment)
New Codes		97165	97166	97167	97168	
		Problem-focused, no comorbidities	Detailed assessments, possible comorbidities	Comprehensive assessments, comorbidities	Only 1 level of complexity for re-evaluation	
		Limited # tx options	Several # tx options	Multiple tx options		
		Consider Typical Face-To-Face Time			Typical Time	
		30 min	45 min	60 min	30 min	
DEVELOP PLAN OF CARE (Plan)		Develop therapy plan of care based on all factors above. Does NOT factor into complexity.				Therapy Plan of Care (Plan)