**UNIVERSITY OF FLORIDA JACKSONVILLE HEALTHCARE, INC.**  
**OFFICE OF COMPLIANCE POLICY AND PROCEDURES**

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<th>DEPARTMENT:</th>
<th>SUBJECT:</th>
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<tr>
<td>Business Groups, Clinical Data Quality Department, Medical Departments, Office of Compliance Staff</td>
<td>Crediting a Prior Review of Systems and/or Past, Family and/or Social History</td>
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<th>EFFECTIVE DATE:</th>
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**BACKGROUND/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 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:**

Per the Guidelines:

DG: 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.

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.

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.

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 Documentation Guidelines (DGs) noted above are satisfied.

**REVISED DATE:**  
**APPROVED DATE:**  
**PREPARED BY:** Maryann C. Palmeter  
**APPROVED BY:**