Consultation versus Transfer of Care

**Consult**

Is there a request asking for advice, opinion, a recommendation suggestion, evaluation, direction or counsel concerning the patient problem or concerning treatment options? **YES**

Was treatment initiated? Note: treatment can be initiated during the first consult. **YES**

Has the receiving MD/NPP sent a report to the requesting MD/NPP? **YES**

This is a consultation. Document that the requesting MD/NPP has asked for your professional advice etc. Both the requesting and consulting physician must document in their copy of the patient’s medical record that a request has been made and the reason for the request. The report of the consultant should be included in medical charts of both the requesting and consulting MD/NPP.

**Transfer (other E&M)**

Is there an agreement in place between the providers that the receiving MD/NPP assume management of the patient’s problem? **NO**

Has the receiving MD/NPP documented that s/he is assuming care? **YES**

This is a transfer of care or referral. Document the assumption of care in your medical record.

In the office/outpatient determine if you or someone else in your group and specialty has seen the patient in the past three years. If not, bill new patient codes. Otherwise bill established patient office/outpatient codes.

For admission in the inpatient hospital/SNF/NF, use initial care codes. Otherwise, use subsequent care codes.

**Rules:**

1. **Consultation**
   - Patient or treatment options discussed.
   - Treatment initiated during first consult.
   - Report sent.

2. **Transfer of Care**
   - Agreement for management.
   - Documented assumption.

3. **Initial Care**
   - Admission in hospital.
   - Initial care codes.

4. **Subsequent Care**
   - Office or outpatient.
   - Establish care.

**Notes:**

- Evaluations and referrals to specialists are consultations.
- Two copies of documentation: request and the report of the consultant.
- Treatment can be initiated during the first consult.
- Follow up visits indicated by request or both physicians.