

Update to Occupational Therapy Evaluation Common Procedural Terminology (CPT) Codes Effective January 1, 2017

The American Medical Association (AMA) is updating the Common Procedural Terminology 2017 manual with three levels of occupational therapy evaluation codes and one level of re-evaluation. The AMA's new CPT codes describe differences in the complexity of evaluations; ranging from low (straightforward), to moderate (involved), to high (very complex). This new system is designed to capture more holistic and comprehensive evaluations by taking into account three main factors. The occupational profile and client history, assessments of occupational performance, and clinical decision making. Each factor must be ranked low, moderate, or high and combined to determine the overall rating.

The use of these codes is mandatory starting **January, 1, 2017**. You will no longer be able to enter in the old code for evaluations dated after this on our systems, but you will still be able to use the old code for any evaluation dated **December, 31, 2016** and earlier. Some of their explanatory charts can be found below, but you are strongly encouraged to view the original materials.

Definition of new codes

Old Code before 1.1.2017	New codes after 1.1.2017
97003 (for all evaluations)	97165 (low complexity)
97004 (for re-evaluations)	97166 (moderate complexity)
	97167 (high complexity)
	97168 (for re-evaluations)

Occupational Profile and Client History

CPT Code	CPT* Description
Low Complexity (97165)	An Occupational profile and medical and therapy history, which includes a brief history including review of medical and/or therapy records relating to the present problem.
Moderate Complexity (97166)	An occupational profile and medical and therapy history, which includes an expanded review of medical and/or therapy records and additional review of physical, cognitive, or psychosocial history related to current functional performance.
High Complexity (97167)	An occupational profile and medical and therapy history, which includes review of medical and/or therapy records and extensive additional review of physical, cognitive, or

	psychosocial history related to current functional performance.
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Assessment of Occupational Performance

CPT Code	CPT* Language
Low Complexity (97165)	Assessment(s) that identifies 1-3 performance deficits (i.e., relating to physical cognitive or psychosocial skills) that result in activity limitations and/or participating restrictions.
Moderate Complexity (97166)	Assessment(s) that identifies 3-5 performance deficits (i.e., relating physical cognitive or psychosocial skills) that result in activity limitations and/or participating restrictions.
High Complexity (97167)	Assessment(s) that identifies 5 or more performance deficits (i.e., relating to physical cognitive or psychosocial skills) that result in activity limitations and/or participating restrictions.

Level of Clinical Decision Making

CPT Code	CPT* Language
Low Complexity (97165)	Clinical decision making of low complexity , which includes an analysis of the occupational profile, analysis of data from problem-focused assessment(s) , and consideration of a limited number of treatment options. Patient presents with no comorbidities that affect occupational performance. Modification of tasks or assistance (e.g., physical or verbal) with assessment(s) is not necessary to enable completion of evaluation component.
Moderate Complexity (97166)	Clinical decision making of moderate analytic complexity , which includes an analysis of the occupational profile, analysis of data from detailed assessment(s) , and consideration of several treatment options . Patient may present with comorbidities that affect occupational performance. Minimal to modification of tasks or assistance (e.g., physical or verbal) with assessment(s) is necessary to enable patient to complete evaluation component.
High Complexity (97167)	Clinical decision making of high analytic complexity , which includes an analysis of the occupational profile, analysis of data from comprehensive assessment(s) , and consideration of multiple treatment options . Patient may present with comorbidities that affect occupational performance. Significant modification of tasks or assistance (e.g., physical or verbal) with assessment(s) is

	necessary to enable patient to complete evaluation component.
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Summary

Evaluation Code	Occupational Profile and Medical/Therapy History	Patient Assessment	Clinical Decision Making
Low Complexity (97165)	Problem-focused	Problem-focused	Low
Moderate Complexity (97166)	Detailed	Detailed	Moderate
High Complexity (97167)	Comprehensive	Comprehensive	High

**This document references the [AMA Common Procedural Terminology \(CPT®\)](http://www.ama-assn.org) 2017 manual, for more information please read the source materials and visit www.aota.org*