



Active vs. Historical Conditions A Quick Reference Guide for Providers

Each date of service (DOS) is considered *stand-alone* and should accurately reflect the status of all co-existing conditions affecting medical decision making. A common issue to avoid in clinical documentation is active conditions reported as historical and vice versa.

Active conditions are currently managed with ongoing treatment. Once there is no evidence of a condition and further treatment is not needed, it should be considered historical. Historical conditions may need to be monitored or may require surveillance or screening due to potential recurrence. Documentation should reflect these situations.

Documentation Tips:

- All conditions, regardless of status, should be accurately documented when they affect the care, treatment, or management of the patient during each encounter.
- Active and historical conditions should be accurately documented when they are considered for medical necessity in procedures and treatment options.
- Active conditions should always be documented to the highest known level of specificity during the visit, along with any coexisting complications being addressed.
 - Alcohol dependence, persistent asthma, Diabetes Mellitus (DM) 2 with end-stage renal disease (ESRD)
- Medication changes, including discontinuation because the condition is resolved, should be documented along with the affected condition.
 - Hyperglycemia due to DM 2
- Active conditions should be documented along with the current specialists monitoring and treating them.
 - Prostate cancer, glaucoma, congestive heart failure (CHF)
- Historical conditions should be removed from the active problem list and/or transferred to the past medical history (PMH) as "resolved."
 - History of cerebral vascular accident (CVA), history of myocardial infarction (MI)
- Avoid using "history of" for any chronic condition that is currently stable.
 - COPD, DM, and atrial fibrillation

Reminder:

Documentation stating "history of" will be interpreted as the condition no longer exists.

Examples of Active vs. History

Condition	Status	Documentation
Left breast cancer	Left mastectomy and treatment completed 10 years prior, scheduling routine annual screening mammogram	History of left breast cancer
T2DM with CKD	Current, labs indicate CKD 3a	T2DM with CKD 3a
Opioid dependence	Historical, listed on PMH	Opioid dependence, in remission

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