

Upper Endoscopy Procedure Note

Structured so the extent, the landmarks and the biopsy protocol are all on the record.

Patient / MRN / DOB	
Date of service	Date _____ · endoscopist _____ · assistant _____ · facility _____
Indication	Dysphagia · reflux refractory to therapy · anemia · GI bleeding · surveillance (Barrett's, varices) · celiac evaluation · other _____
Consent and sedation	Consent obtained Y / N · ASA class ____ · sedation: moderate / MAC / general · agents and doses _____

A Extent and Technique

Extent reached	Second portion of duodenum Y / N · furthest extent _____ · retroflexion in stomach Y / N
Times	Scope in ____ : ____ · scope out ____ : ____ · total ____ min
Instrument	Scope _____ · therapeutic channel Y / N

B Findings by Segment

Esophagus	Mucosa · Z-line at ____ cm · hiatal hernia ____ cm · esophagitis grade (LA classification) ____ · Barrett's: length C_ M_ (Prague)
Stomach	Body, antrum, fundus, cardia · gastritis · ulcer (size, location, Forrest class) · retroflexed view
Duodenum	Bulb and second portion · ulcer · mucosal appearance

C Interventions and Specimens

Biopsies and protocol	Site _____ · number ____ · protocol followed (e.g. four-quadrant every 1 to 2 cm for Barrett's, duodenal for celiac) _____
Therapeutic interventions	Dilation (type, size) · hemostasis (clip, thermal, injection) · variceal banding · placement
Specimens sent	Container labelling and site correspondence confirmed Y / N

D Complications, Plan and Coding

Complications and plan	None / bleeding / perforation / cardiopulmonary · intervention _____ · medication changes · repeat interval _____ · pathology follow-up arranged Y / N
Codes	43235 diagnostic · 43239 with biopsy · 43249 / 43248 dilation · 43243 / 43244 varices · dx _____

E Attestation

Attestation	Endoscopist signature _____ · name and credentials _____ · date and time signed _____
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What makes an EGD note defensible. Reaching the **second portion of the duodenum** is the completeness standard, and retroflexion documents that the cardia was seen. Findings need measurements and classifications rather than adjectives: Z-line in centimetres, hernia size, esophagitis by Los Angeles class, Barrett's by Prague C and M, an ulcer by size, location and Forrest class. Biopsies must name the site and the protocol, because a surveillance biopsy taken outside protocol is not surveillance.

A template still means you write the note. Sully's AI Scribe captures the visit and writes it into your EHR, the AI Coder submits the coded claim, and the AI Receptionist books the follow-up, on one integration across Epic, Cerner, Meditech, and Athenahealth.

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