

Behavioral Health Telehealth Note

The category that survives past 2027, and the one carrying an in-person visit requirement most notes cannot record.

Patient / MRN / DOB	
Date of service	Date _____ · start _____ : _____ · stop _____ : _____ · total time ____ min

A Virtual Encounter Record

Patient location	Home / private residence → POS 10 · other location _____ → POS 02 · address or city and state _____
Clinician and modality	Site _____ · state ____ · licensed in patient's state Y / N · real-time audio-video / audio-only · platform _____ · modifier 95 (commercial and MA) / 93 (audio-only) / FQ / GT as payer requires
Consent, identity, others present	Identity verified Y / N · consent to telehealth documented Y / N · date _____ · others present: patient side _____ · clinician side _____

B In-Person Visit Requirement

Becomes enforceable after December 31, 2027

Patient status	Began mental health telehealth at home on or before 31 Dec 2027 (established) / on or after 1 Jan 2028 (new)
In-person visits	Last in-person non-telehealth service _____ furnished by _____ · next due _____ · at least one every 12 months · may be furnished by a same-specialty clinician in your group if you are unavailable Y / N

C Clinical

Interval history	Symptoms, adherence, side effects, stressors, substance use
Mental status examination	Appearance, behaviour, speech, mood, affect, thought process and content, cognition, insight, judgement
Risk assessment	Ideation, plan, intent, means access · protective factors · safety plan and patient's physical location confirmed
Instruments	Tool _____ score _____ · tool _____ score _____

D Assessment, Plan and Coding

Assessment and plan	Diagnosis, medication changes with rationale, psychotherapy, referrals, follow-up interval
Codes	E/M or psychotherapy code · POS 02 or 10 · modifier 93 if audio-only · dx _____

E Attestation

Attestation	Clinician signature _____ · name and credentials _____ · date and time signed _____
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Why this template has an in-person tracker. Under section 1834(m), an in-person non-telehealth visit within **6 months prior** to the first mental health telehealth service becomes effective **after 31 December 2027**, and thereafter an in-person service is required **within 12 months** of each mental health telehealth service, with limited exceptions. Those visits may be furnished by a same-specialty clinician in the same group if the treating clinician is unavailable. Patients who began receiving mental health telehealth at home **on or before 31 December 2027 count as established** and skip the prior 6-month visit, needing one in-person visit every 12 months thereafter. Document which side of that line each patient sits on now, rather than reconstructing it in 2028.

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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