

Preventive Visit Plus Problem E/M

For the visit that starts as a physical and turns into something else. Two services, documented separately, so the problem-oriented work is billable rather than absorbed.

Patient / MRN / DOB	
Date of service	Date _____ · start _____ : _____ · stop _____ : _____ · total time ____ min
Encounter	In person / telehealth · audio-video / audio-only · POS ____ (02 / 10) · modifier ____ (95 / 93) · consent Y / N

A Preventive Service

The wellness or physical portion

Preventive code	99381 to 99397 by age and new or established · or AWV G0438 / G0439
Age-appropriate history and exam	
Counseling, risk factor reduction, screenings ordered	

B Problem-Oriented Service

All four elements are required for modifier 25

1. Chief complaint for the separate problem	Distinct from the preventive visit
2. HPI specific to that problem	
3. Exam relevant to that problem	
4. Medical decision making and treatment plan	Diagnosis, data reviewed, risk, and what you did about it

C Coding

Problem E/M code	99202 to 99205 new · 99212 to 99215 established · with modifier 25
Diagnosis linkage	Problem-oriented dx (ICD-10) _____ linked to the E/M line, preventive dx to the preventive line

D Attestation

Attestation	Clinician signature _____ · name and credentials _____ · date and time signed _____ · supervising clinician if required _____
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What makes this billable. A preventive visit and a problem-oriented E/M on the same day are both payable when the problem work is **significant and separately identifiable**. Section B is what proves it: a chief complaint, an HPI, an exam, and medical decision making that stand on their own, apart from the preventive service. Append **modifier 25** to the problem E/M code and link each diagnosis to the correct line. If Section B would read as part of the physical, it is not separately billable.

A template still means you write the note. Sully's AI Scribe captures the session 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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