

**Medicare Preventive Services  
Initial Preventive Physical Exam & Annual Wellness Visit  
SETMA Tutorial**

**Index**

<b>Introduction</b>	<b>2</b>
<b>Five Medicare Preventive Services</b>	<b>3</b>
<b>The Key to these codes: No cost to the patient for preventive care</b>	<b>4</b>
<b>Accessing Medicare Preventive Codes in SETMA's EMR</b>	<b>5</b>
<b>Determining Patient's Eligibility for Medicare Preventive Visits</b>	<b>6</b>
<b>Required Elements for Medicare Preventive Visits</b>	<b>7</b>
<b>When a Required Element is Missing How to Fulfill it</b>	<b>7</b>
<b>How to "Calculate Code Eligibility"?</b>	<b>9</b>
<b>The Other Option – The Eligible Code is an IPPE</b>	<b>11</b>
<b>The IPPE and a Screening EKG</b>	<b>13</b>
<b>The IPPE and a Screening Abdominal Ultrasound</b>	<b>15</b>
<b>Additional Step for Ultrasound Completion</b>	<b>17</b>
<b>Submitting E&amp;M Code Medicare Preventive Visits</b>	<b>20</b>
<b>General Concepts about Initial Preventive Physical Exam (IPPE)</b>	<b>21</b>
<b>Content of Annual Wellness Visit initial and Subsequent</b>	<b>21</b>

CMS is getting serious about Preventive Health Services which have the potential for moving us toward the fulfillment of the Triple Aim: improved care (processes), improve health (outcomes) and decreased costs (sustainability). The new Intensive Behavioral Therapy codes for obesity and cardiovascular disease along with the Initial Preventive Physical Exam (IPPE), the Annual Wellness Visit Initial and Annual Wellness Visit Subsequent are significant advances in recognizing the value of preventive care and in recognizing the expertise of those who have the tools to provide those services.

Along with the Transitions of Care Management Codes which have been published this year, these preventive codes encourage the “right stuff” in primary healthcare delivery. SETMA is determined to support and to promote these efforts by utilizing them in our practice. The following is a link to our published deployment on our website of the Transitions of Care Management Codes which we are currently using in our almost 5,000 hospital discharges a year.

<http://www.jameslhollymd.com/epm-tools/transition-of-care-management-code-tutorial>

The following references provide content information for Preventive Services authorized by Centers for Medicare and Medicaid (CMS). SETMA’s Clinical Decision Support (CDS) tools for these Preventive Services were developed on the basis of these and other official AMA and CMS publications.

1. The American Medical Association (AMA) owns the copyright to CPT (*Current Procedural Terminology*). The *Quick Reference Information Preventive Services* is a summary of the Preventive Services authorized by Medicare (May 2012).

[http://www.cms.gov/Medicare/Prevention/PrevntionGenInfo/downloads/MP\\_S\\_QuickReferenceChart\\_1.pdf](http://www.cms.gov/Medicare/Prevention/PrevntionGenInfo/downloads/MP_S_QuickReferenceChart_1.pdf)

2. The following reference is to the AMA’s *Quick Reference Information: the ABC’s of Providing the Initial Preventive Physical Examination* (IPPE).

[http://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/MPS\\_QRI\\_IPPE001a.pdf](http://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/MPS_QRI_IPPE001a.pdf)

3. The following reference is to CMS’s *The ABCs of the Initial Preventive Physical Exam and the Annual Wellness Visit*.

[http://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/ippe\\_awv\\_call\\_presentation.pdf](http://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/downloads/ippe_awv_call_presentation.pdf)

This tutorial will explain SETMA’s deployment of CDS Tools for the new Medicare Preventive Services:

1. Initial Preventive Physical Examination (IPPE or Welcome to Medicare)
2. Annual Wellness Examination (Initial) (AWV)
3. Annual Wellness Examination (Subsequent) (AWV)

4. Intensive Behavioral Therapy (IBT) for Obesity – this will be discussed in a subsequent tutorial
5. Intensive Behavioral Therapy (IBT) for Cardiovascular Disease – this will be discussed in a subsequent tutorial

## Initial Preventive Physical Exam (IPPE) & Annual Wellness Visit (AWV)

Every patient encounter at SETMA begins on the AAA Home Template shown below with the review of the Pre-visit Preventive Screening. When a Transitions of Care or a Medicare Preventive Visit is warranted, the type of visit is designated; depending on the patient's need, this alert can say either:

- Patient Eligible for Transitions Care Management Exam
- Patient Eligible for Medicare Preventive Care Examination

If the patient is eligible for neither, nothing will appear in this place. When one of these two notices is present, the provider knows that the patient has recently been discharged from the hospital and is eligible for Transition of Care Management Services, or that the patient is eligible for one of the Medicare Preventive Care evaluations.

## Patient Eligible for Transitions Care Management Coding

**SOUTHEAST TEXAS MEDICAL ASSOCIATES, LLP**

Patient: Chart [ ] QTest [ ] Sex: M Age: 64 Date of Birth: 03/01/1949 Patient's Code Status: [ ]

Home Phone: ( ) - Work Phone: ( ) - Cell Phone: ( ) -

**Pre-Visit/Preventive Screening**  
**Patient Eligible For Transitions Care Management Exam**

**Bridges to Excellence View**

**Preventive Care**  
[SETMA's LESS Initiative](#)  
 Last Updated: 01/21/2013  
[Preventing Diabetes](#)  
 Last Updated: / /  
[Preventing Hypertension](#)  
[Smoking Cessation](#)  
[Care Coordination Referral](#)  
[PC-MH Coordination Review](#)  
*Needs Attention!!*  
[HEDIS](#) [NQF](#) [PQRS](#) [ACO](#)  
[Elderly Medication Summary](#)  
[STARS Program Measures](#)

**Template Suites**  
[Master GP](#)  
[Pediatrics](#)  
[Nursing Home](#)  
[Ophthalmology](#)  
[Physical Therapy](#)  
[Podiatry](#)  
[Rheumatology](#)  
**Hospital Care**  
[Hospital Care Summary](#)  
[Daily Progress Note](#)  
[Admission Orders](#)

**Disease Management**  
[Diabetes](#)  
[Hypertension](#)  
[Lipids](#)  
[Acute Coronary Syn](#)  
[Angina](#)  
[Asthma](#)  
[Cardiometabolic Risk Syn](#)  
[CHF](#)  
[Diabetes Education](#)  
[Headaches](#)  
[Renal Failure](#)  
[Weight Management](#)

**Last Updated**  
 03/18/2013  
 03/18/2013  
 03/18/2013  
 / /  
 / /  
 / /  
 / /  
 / /  
 / /  
 / /  
 / /

**Special Functions**  
[Lab Present](#)  
[Lab Future](#)  
[Lab Results](#)  
[Hydration](#)  
[Nutrition](#)  
[Guidelines](#)  
[Pain Management](#)  
[Immunizations](#)  
[Reportable Conditions](#)

**Information**  
[Charge Posting Tutorial](#)  
[Drug Interactions](#)  
[E&M Coding Recommendations](#)  
[Infusion Flowsheet](#)  
[Insulin Infusion](#)

**Exercise**  
[Exercise](#)  
[CHF Exercise](#)  
[Diabetic Exercise](#)

**Patient's Pharmacy**  
 [ ]  
 Phone: ( ) - Fax: ( ) -  
[Rx Sheet - Active](#)  
[Rx Sheet - New](#)  
[Rx Sheet - Complete](#)  
[Home Health](#)

**Pending Referrals**

Status	Priority	Referral	Referring Provider
Completed	Immediate	Mammogram	Anwar
Completed	Routine		Abbas
Completed	Stat	Arterial Blood Gas	Holly
Completed	Routine	Abdullah, Nabeel	Holly
Completed	Routine	Abdullah, Nabeel	Holly
Completed	Routine	Shan Shoulin	Abbas

**Chart Note**  
[Return Info](#)  
[Return Doc](#)  
[Email](#)  
[Telephone](#)  
[Records Request](#)  
[Transfer of Care Doc](#)

## Patient is eligible for a Medicare Prevention Visit

**SOUTHEAST TEXAS MEDICAL ASSOCIATES, LLP**

Patient Chart QTest Sex M Age 66 Patient's Code Status  
 Home Phone ( ) - Date of Birth 04/11/1946 Full Code  
 Work Phone ( ) -  
 Cell Phone ( ) -

**Pre-Visit/Preventive Screening**  
**Patient Eligible For Medicare Preventive Exam**

**Bridges to Excellence View**

Preventive Care	Template Suites	Disease Management	Last Updated	Special Functions
SETMA's LESS Initiative I	Master GP I	Diabetes I	03/18/2013	Lab Present
Last Updated 01/21/2013	Pediatrics	Hypertension I	03/18/2013	Lab Future I
Preventing Diabetes I	Nursing Home I	Lipids I	03/18/2013	Lab Results I
Last Updated / /	Ophthalmology	Acute Coronary Syn I	/ /	Hydration I
Preventing Hypertension I	Physical Therapy	Angina I	/ /	Nutrition I
Smoking Cessation I	Podiatry	Asthma I	/ /	Guidelines I
Care Coordination Referral	Rheumatology	Cardiometabolic Risk Syn I	/ /	Pain Management I
PC-MH Coordination Review	Hospital Care	CHF I	/ /	Immunizations
Needs Attention!!	Hospital Care Summary I	Diabetes Education	/ /	Reportable Conditions
HEDIS NQF PQRS ACO	Daily Progress Note	Headaches	/ /	Information
Elderly Medication Summary	Admission Orders I	Renal Failure	/ /	Charge Posting Tutorial
STARS Program Measures		Weight Management I	/ /	Drug Interactions I
				E&M Coding Recommendations
				Infusion Flowsheet
				Insulin Infusion

**Exercise** Exercise I  
 CHF Exercise I  
 Diabetic Exercise I

**Patient's Pharmacy**  
 Phone ( ) -  
 Fax ( ) -

Rx Sheet - Active  
 Rx Sheet - New  
 Rx Sheet - Complete  
 Home Health

**Pending Referrals I**

Status	Priority	Referral	Referring Provider
Completed	Immediate	Mammogram	Anwar
Completed	Routine		Abbas
Completed	Stat	Arterial Blood Gas	Holly
Completed	Routine	Abdullah, Nabeel	Holly
Completed	Routine	Abdullah, Nabeel	Holly
Completed	Routine	Shan Shafiq	Abbas

**Chart Note**  
 Return Info  
 Return Doc  
 Email  
 Telephone  
 Records Request  
 Transfer of Care Doc

The following is the **Evaluation and Management (E&M)** template from SETMA's electronic medical record with the codes for the Medicare Preventive Services – Initial Prevention Physical Examiner (Welcome to Medicare Visit) (IPPE) and Annual Wellness Visit Initial or Annual Wellness Visit Subsequent (AWV) displayed.

**The key to these codes is that there is no deductible and CMS pays the provider for the full allowable benefit.** This is a savings to patients and it is also a revenue benefit to the healthcare provider. The payment for the IPPE is approximately \$159 with no cost to the patient. If a screening EKG and/or screening abdominal ultrasound is warranted and ordered at this time, the fee is paid in addition to the IPPE fee and it is paid without deductible, also.

Outlined in green below, there are three preventive-care, wellness visit codes authorized by CMS. They differ by when they are allowed to be performed and by the fact that in the case of the IPPE an EKG and an Abdominal Ultrasound can be ordered. The code descriptions are:

- **G0402** Initial Preventive Physical Examination (IPPE) (Also called the Welcome to Medicare Preventive Visit )



- **G0438 Annual Wellness Visit, Initial (AWV)** Annual wellness visit, including a personalized prevention plan of service (PPPS), first visit.
- **G0439 Annual Wellness Visit, Subsequent (AWV)** Annual Wellness visit, including a personalized prevention plan of service (PPPS), subsequent visit. Annual Wellness Visits can be for either new or established patients as the code does not differentiate. The initial AWV, G0438, is performed on patients that have been enrolled with Medicare for more than one year.

[Tutorial](#)

## Evaluation and Management

**Acute Dx**

<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

**Chronic Dx**

<input type="checkbox"/>	Abd Pain Rebound Tende
<input type="checkbox"/>	Baker Cyst Syno Cyst Pc
<input type="checkbox"/>	Cachexia
<input type="checkbox"/>	Dacryocystitis Eye
<input type="checkbox"/>	E Coli Infection
<input type="checkbox"/>	Face Contusion (No Eye)
<input type="checkbox"/>	Gambling Pathological
<input type="checkbox"/>	H/CKD Benign CKD 1-4 C
<input type="checkbox"/>	Ichthyosis Congenita
<input type="checkbox"/>	Keloid Scar
<input type="checkbox"/>	Labial Adhesions Genital
<input type="checkbox"/>	Malabsorption Celiac Rici
<input type="checkbox"/>	Nail Cong Anomaly Integu
<input type="checkbox"/>	OA, Generalized
<input type="checkbox"/>	DM Type II W/O Comp Cc
<input type="checkbox"/>	Hyperten Malig Essential
<input type="checkbox"/>	Jealousy, Sibling
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

☐ Clear Diagnosis Fields

In order to see the **SUBMIT** button, you **MUST** answer the E-Prescribing code question below in red.

**New Patients**

☐ 99201 Brief

☐ 99202 Problem Focused

☐ 99203 Expanded Problem

☐ 99204 Detailed Problem

☐ 99205 Comprehensive Problem

**Established**

☐ 99211 Brief

☐ 99212 Problem Focused

☐ 99213 Expanded Problem

☐ 99214 Detailed Problem

☐ 99215 Comprehensive Problem

☐ Observation/Discharge Management

**Nursing Home**

☐ 99304 Initial Limited

☐ 99305 Initial Extended

☐ 99306 Initial Comprehensive

☐ 99307 Subsequent Limited

☐ 99308 Subsequent Extended

☐ 99309 Subsequent Comprehensive

☐ 99310 Subsequent High Complexity

☐ 99315 NH Discharge

☐ 99316 NH Discharge, 30+ mins

☐ 99318 Nursing Facility Care, Annual

☐ 99324 Domicil, New Pt, Prob Focus

☐ 99325 Domicil, New Pt, Expanded

☐ 99326 Domicil, New Pt, Detailed

☐ 99327 Domicil, New Pt, Mod Comp

☐ 99328 Domicil, New Pt, High Comp

☐ 99334 Domicil, Est Pt, Prob Focus

☐ 99335 Domicil, Est Pt, Expanded

☐ 99336 Domicil, Est Pt, Detailed

☐ 99337 Domicil, Est Pt, Comprehensive

**Care Transition**

☐ 99495 Transition of Care Management Within 14 days (99214 or higher)

☐ 99496 Transition of Care Management Within 7 days (99215)

**New Patients**

*Commercial Insurance only*

☐ 99381 Preventive Visit, Infant

☐ 99382 Preventive Visit, Age 1 to 4

☐ 99383 Preventive Visit, Age 5 to 11

☐ 99384 Preventive Visit, Age 12 to 17

☐ 99385 Preventive Visit, Age 18 to 39

☐ 99386 Preventive Visit, Age 40 to 64

☐ 99387 Preventive Visit, Age 65+

**Established**

*Commercial Insurance only*

☐ 99391 Preventive Visit, Infant

☐ 99392 Preventive Visit, Age 1 to 4

☐ 99393 Preventive Visit, Age 5 to 11

☐ 99394 Preventive Visit, Age 12 to 17

☐ 99395 Preventive Visit, Age 18 to 39

☐ 99396 Preventive Visit, Age 40 to 64

☐ 99397 Preventive Visit, Age 65+

**Consultation**

Referring

☐ 99241 Brief

☐ 99242 Problem Focused

☐ 99243 Expanded Problem

☐ 99244 Comprehensive Problem

**Suture Removal**

☐ 99224 Suture Removal/Repacking Rem

**Medicare Preventive**

☐ G0402 Initial Preventive Physical Exam

☐ G0438 Annual Wellness Visit, Initial

☐ G0439 Annual Wellness Visit, Subsequent

**Behavioral Therapy**

☐ G0477 Intensive Therapy - Obesity

☐ G0446 Intensive Therapy - Cardiovascular Disease

**E-Prescribing**

Was at least one prescription during the encounter generated and submitted electronically? ☒ Yes ☐ No

**Comments** (Insert special instructions here then click email button.)

The G0402 code denotes the **Welcome to Medicare Visit** (also called the **Initial Preventive Physical Exam (IPPE)**). It must be performed within one year of becoming eligible for Medicare and it is a once in the patient's life-time benefit. It is not for a routine physical examination and does not provide for payment of laboratory services except a screening EKG and, when the patient is qualified, an Abdominal Ultrasound for screening for an abdominal aortic aneurysm. There are five codes related to the IPPE which are:

- **G0402** Initial Preventive Physical Examination (Welcome to Medicare Preventive Visit)
- **G0403** EKG with interpretation and report, performed as a screening for the IPPE
- **G0404** EKG without interpretation and report
- **G0405** EKG interpretation and report only
- **G0389** Abdominal Ultrasound – once in a lifetime benefit – deductible waived, must meet criteria for screening (see below)

The following is the E&M Template with the code for the IPPE outlined in green.

**Evaluation and Management**

**Acute Dx**

**Chronic Dx**

**New Patients**

**Established**

**Nursing Home**

**Care Transition**

**Recommendations**

**E-mail**

**Submit**

In order to see the SUMBIT button, you MUST answer the E-Prescribing code question below in red.

**New Patients**

**Commercial Insurance only**

**Established**

**Commercial Insurance only**

**Consultation**

**Suture Removal**

**Behavioral Therapy**

**E-Prescribing**

**Comments** (Insert special instructions here then click email button.)

☒ **G0402 Initial Preventive Physical Exam**

☐ **G0439 Annual Wellness Visit, Subsequent**

☐ **G0477 Intensive Therapy - Obesity**

☐ **G0446 Intensive Therapy - Cardiovascular Disease**

**Was at least one prescription during the encounter generated and submitted electronically?**

☒ **Yes**

☐ **No**



Just above the three codes is a button entitled **Eligibility** (outlined in green below).

**Evaluation and Management**

[Tutorial](#)

Acute Dx

Chronic Dx

Abd Pain Rebound Tende

Baker Cyst Syno Cyst Pc

Cachexia

Dacryocystitis Eye

E Coli Infection

Face Contusion (No Eye)

Gambling Pathological

H/CKD Benign CKD 1-4 C

Ichthyosis Congenita

Keloid Scar

Labial Adhesions Genital

Malabsorption Celiac Rici

Nail Cong Anomaly Integ

OA, Generalized

DM Type II W/O Comp Cc

Hyperten Malig Essential

Jealousy, Sibling

Hypertension

Clear Diagnosis Fields

E-mail

Recommendations

In order to see the SUMBIT button, you MUST answer the E-Prescribing code question below in red.

**New Patients**

99201 Brief

99202 Problem Focused

99203 Expanded Problem

99204 Detailed Problem

99205 Comprehensive Problem

**Established**

99211 Brief

99212 Problem Focused

99213 Expanded Problem

99214 Detailed Problem

99215 Comprehensive Problem

Observation/Discharge Management

**Nursing Home**

99304 Initial Limited

99305 Initial Extended

99306 Initial Comprehensive

99307 Subsequent Limited

99308 Subsequent Extended

99309 Subsequent Comprehensive

99310 Subsequent High Complexity

99315 NH Discharge

99316 NH Discharge, 30+ mins

99318 Nursing Facility Care, Annual

99324 Domicil, New Pt, Prob Focus

99325 Domicil, New Pt, Expanded

99326 Domicil, New Pt, Detailed

99327 Domicil, New Pt, Mod Comp

99328 Domicil, New Pt, High Comp

99334 Domicil, Est Pt, Prob Focus

99335 Domicil, Est Pt, Expanded

99336 Domicil, Est Pt, Detailed

99337 Domicil, Est Pt, Comprehensive

**Care Transition**

99495 Transition of Care Management Within 14 days (99214 or higher)

99496 Transition of Care Management Within 7 days (99215)

**New Patients**

**Commercial Insurance only**

99381 Preventive Visit, Infant

99382 Preventive Visit, Age 1 to 4

99383 Preventive Visit, Age 5 to 11

99384 Preventive Visit, Age 12 to 17

99385 Preventive Visit, Age 18 to 39

99386 Preventive Visit, Age 40 to 64

99387 Preventive Visit, Age 65+

**Established**

**Commercial Insurance only**

99391 Preventive Visit, Infant

99392 Preventive Visit, Age 1 to 4

99393 Preventive Visit, Age 5 to 11

99394 Preventive Visit, Age 12 to 17

99395 Preventive Visit, Age 18 to 39

99396 Preventive Visit, Age 40 to 64

99397 Preventive Visit, Age 65+

**Consultation**

Referring

99241 Brief

99242 Problem Focused

99243 Expanded Problem

99244 Comprehensive Problem

**Suture Removal**

99024 Suture Removal/Debridement

**Medicare Preventive**

G0402 Initial Preventive Exam

G0438 Annual Wellness Visit, Initial

G0439 Annual Wellness Visit, Subsequent

**Medicare Behavioral Therapy**

G0446 Intensive Therapy - Cardiovascular Disease

G0447 Intensive Therapy - Obesity

**E-Prescribing**

Was at least one prescription during the encounter generated and submitted electronically?

Yes

No

**Eligibility**

Comments (Insert special instructions here then click email button.)

When that Eligibility button is clicked, the Medicare Preventive Exam template appears. On this template all the elements of the three preventive care examinations appear. In order to bill for any of the Medicare Preventive codes, all of the elements listed on this template must be fulfilled. Until they are, if you click the **Calculate Code Eligibility** button, you will be informed that there is no code for which you can bill.

## Medicare Preventive Exams

1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>

2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.

*You may NOT bill for any Medicare Preventive Exams as you have not met all of the criteria listed above.*

*You may NOT bill for any Medicare Preventive Exams for this patient as it appears they do not qualify.*

When any of the required elements are not fulfilled, they will appear in red as above. In order to fulfill an incomplete element of the exam (those in red), simply click on the “**Click to Complete**” button to the right of each element which has not been met. You will be taken to the place in the EMR where that evaluation can be completed and documented. You will then be returned to the above template. Once all of the elements are fulfilled – see the template below – all will turn black.



## Medicare Preventive Exams

1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
<b>Has the patient's visual acuity been recorded today?</b>	<input type="button" value="No"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>

2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.

*You may NOT bill for any Medicare Preventive Exams as you have not met all of the criteria listed above.  
You may NOT bill for any Medicare Preventive Exams for this patient as it appears they do not qualify.*

When you deploy the “**Click to Complete**” button next to the “visual acuity” element of the Medicare Preventive exam, you are taken to the template in SETMA’s EMR where the visual acuity is documented. See below in green.

PBM NURSE HISTORIES HEALTH QUIZES HPI ROS P.E. X-RAY ASSESS PLAN PROCS

**Vital Signs** Vitals/Time Red = Required Field

Temperature  \*F  \*C

**Pulse**  ☐ Regular ☐ Irregular

Resp Rate/Min  ☐ Shallow ☐ Retracting

Weight  lb  kg

Height  in

BMI  Help **Severely Obese**

Body Fat %  Help

BMR  Help cal/day

Protein Req  grams/day

Pulse Oximetry  % ☒ Room Air ☐ Oxygen

Glucose Level

Last Menstrual Period  Blood Type

Year of Menopause

Last Tetanus

Carotid Intima Media Thickening (CIMT)  
Left  mm Right  mm

**Nursing Notes** Pedi % Tiles

**Blood Pressure** L R Pulse Pressure

Trial 1  /  mmHg ☒ ☐

Trial 2  /  mmHg ☒ ☐

Trial 3  /  mmHg ☐ ☐

☐ Check if unable to measure blood pressure.

Mid-Arm Circumference   Cuff Used Today ☐ Adult Standard ☐ Adult Large ☐ Adult Thigh Cuff

Recommended Cuff Size

**Orthostatics** Pulse

Lying  /  mmHg

Sitting  /  mmHg

Standing  /  mmHg

**Visual Acuity** ☐ With Glasses ☒ No Glasses

20 /  OS 20 /

20 /  OD 20 /

20 /  OU 20 /

**Proportion Cardiovascular Risk Ratio** How-To Help

Waist  Abdomen

Hips  Chest

Ratio  [Neck](#)

**Return**

☒ Histories

☒ Health

☒ Questionnaires

☐ HPI Chief

☐ System Review

☐ Physical Exam

☐ Radiology

☒ Assessment

☒ Plan

☐ Procedures

**Meds**

☐ IV Therapy

☐ Immunizations

☐ Return Info.

☐ Return Doc.

☐ Home Health

Once you document the visual acuity, click the “return” button at the top right of the template.

PBM NURSE HISTORIES HEALTH QUIZES HPI ROS P.E. X-RAY ASSESS PLAN PROC

**Vital Signs** Vitals/Time Red = Required Field

Temperature 98.50 \*F 36.58 \*C

Pulse 88.00 ☐ Regular ☐ Irregular

Resp Rate/Min 22 ☐ Shallow ☐ Retracting

Weight 255.00 lb 115.91 kg

Height 65.50 in 10/31/2012

BMI Help 41.84 **Severly Obese**

Body Fat % Help 38.9 03/08/2013

BMR Help 2759 cal/day

Protein Req 139 grams/day

Pulse Oximetry 98 % ☒ Room Air ☐ Oxygen

Glucose Level

Last Menstrual Period / / Blood Type O+

Year of Menopause

Last Tetanus 06/08/2010

Carotid Intima Media Thickening (CIMT)  
Left mm Right mm

**Nursing Notes** Pedi % Tiles

**Blood Pressure** L R Pulse Pressure

Trial 1 145 / 95 mmHg ☒ ☐

Trial 2 145 / 90 mmHg ☒ ☐

Trial 3 144 / 90 mmHg ☐ ☐

☐ Check if unable to measure blood pressure.

Mid-Arm Circumference 12.5 10/31/2012 Cuff Used Today ☐ Adult Standard ☐ Adult Large ☐ Adult Thigh Cuff

Recommended Cuff Size Adult

**Orthostatics** Pulse

Lying mmHg

Sitting mmHg

Standing mmHg

**Visual Acuity** ☐ With Glasses ☒ No Glasses

20 / 20 OS 20 / 20

20 / 20 OD 20 / 20

20 / 20 OU 20 / 20

**Peak Flow**

Trial 1 Predicted Avg Calc

Trial 2 If <60% institute therapy.

Trial 3 Percentage Calc

**Proportion Cardiovascular Risk Ratio** How-To Help

Waist 48.00 Abdomen 47

Hips 46.00 Chest 52.00 01/14/2013

Ratio 0.90 [Neck](#) 19.0

**Return**

Medications ☒

Health

Questionnaires ☒

HPI Chief

System Review

Physical Exam

Radiology

Assessment ☒

Plan ☒

Procedures

Meds

IV Therapy

Immunizations

Return Info.

Return Doc.

Home Health

This takes you right back to the Medicare Preventive Exams template and now you see that the element in the exam – visual acuity – which was red is now black.

At this point, you click the “**Calculate Code Eligibility**” which is shown on the following template outlined in green.

## Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0438 Medicare Preventive Exam. Click OK to close this template and the G0438 code will be selected for you on the next screen.*

*Don't forget to click Submit on the next screen.*



When the resulting eligibility code is an Annual Wellness Visit Initial (G0438) or an Annual Wellness Visit Subsequent (G0439), the following template will appear with the eligible code outlined in green.

### Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0438 Medicare Preventive Exam. Click OK to close this template and the G0438 code will be selected for you on the next screen.*

*Don't forget to click Submit on the next screen.*

At this point, click “OK.” This action closes the Medicare Preventive Exam pop-up and the E&M template appears.

## Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0438 Medicare Preventive Exam. Click OK to close this template and the G0438 code will be selected for you on the next screen.*

*Don't forget to click Submit on the next screen.*

Tutorial		Evaluation and Management		Recommendations	
em_cpt_rec_em_code)					
Fredrickson Type IIa Hyp		<input type="checkbox"/> Clear Diagnosis Fields		<input type="button" value="E-mail"/>	
				<input type="button" value="Submit"/>	
In order to see the SUMBIT button, you MUST answer the E-Prescribing code question below in red.					
<b>New Patients</b> <input type="checkbox"/> 99201 Brief <input type="checkbox"/> 99202 Problem Focused <input type="checkbox"/> 99203 Expanded Problem <input type="checkbox"/> 99204 Detailed Problem <input type="checkbox"/> 99205 Comprehensive Problem <b>Established</b> <input type="checkbox"/> 99211 Brief <input type="checkbox"/> 99212 Problem Focused <input type="checkbox"/> 99213 Expanded Problem <input type="checkbox"/> 99214 Detailed Problem <input type="checkbox"/> 99215 Comprehensive Problem <input type="checkbox"/> Observation/Discharge Management <b>Chronic Dx</b> <input type="checkbox"/> DM (diabetes mellitus) ty <input type="checkbox"/> Hypertensive retinopathy <input type="checkbox"/> Gout <input type="checkbox"/> BPH without urinary obst <input type="checkbox"/> Elevated sed rate <input type="checkbox"/> Obesity, morbid <input type="checkbox"/> Elevated blood uric acid l <input type="checkbox"/> Meniscus, lateral, derang <input type="checkbox"/> Hypertension <input type="checkbox"/> Metabolic syndrome <input type="checkbox"/> Elevated C-reactive prote <input type="checkbox"/> Elevated homocysteine <input type="checkbox"/> Coronary artery disease <input type="checkbox"/> Diastolic CHF, chronic <input type="checkbox"/> Chronic renal disease, sl <input type="checkbox"/> Myocardial infarct, old		<b>New Patients</b> <i>Commercial Insurance only</i> <input type="checkbox"/> 99381 Preventive Visit, Infant <input type="checkbox"/> 99382 Preventive Visit, Age 1 to 4 <input type="checkbox"/> 99383 Preventive Visit, Age 5 to 11 <input type="checkbox"/> 99384 Preventive Visit, Age 12 to 17 <input type="checkbox"/> 99385 Preventive Visit, Age 18 to 39 <input type="checkbox"/> 99386 Preventive Visit, Age 40 to 64 <input type="checkbox"/> 99387 Preventive Visit, Age 65+ <b>Established</b> <i>Commercial Insurance only</i> <input type="checkbox"/> 99391 Preventive Visit, Infant <input type="checkbox"/> 99392 Preventive Visit, Age 1 to 4 <input type="checkbox"/> 99393 Preventive Visit, Age 5 to 11 <input type="checkbox"/> 99394 Preventive Visit, Age 12 to 17 <input type="checkbox"/> 99395 Preventive Visit, Age 18 to 39 <input type="checkbox"/> 99396 Preventive Visit, Age 40 to 64 <input type="checkbox"/> 99397 Preventive Visit, Age 65+ <b>Consultation</b> Referring <input type="text"/> <input type="text"/> <input type="checkbox"/> 99241 Brief <input type="checkbox"/> 99242 Problem Focused <input type="checkbox"/> 99243 Expanded Problem <input type="checkbox"/> 99244 Comprehensive Problem <b>Suture Removal</b> <input type="checkbox"/> 99024 Suture Removal/Packing Rem <b>Medicare Preventive</b> <input type="button" value="Eligibility"/> <input checked="" type="checkbox"/> G0438 Annual Wellness Visit, Initial <input type="checkbox"/> G0439 Annual Wellness Visit, Subsequent <b>Medicare Behavioral Therapy</b> <input type="checkbox"/> G0446 Intensive Therapy - Cardiovascular Disease <input type="checkbox"/> G0447 Intensive Therapy - Obesity <b>E-Prescribing</b> Was at least one prescription during the encounter generated and submitted electronically? <input checked="" type="radio"/> Yes <input type="radio"/> No			
<b>Care Transition</b> <input type="button" value="Eligibility"/> <input type="checkbox"/> 99495 Transition of Care Management Within 14 days (99214 or higher) <input type="checkbox"/> 99496 Transition of Care Management Within 7 days (99215)		<b>Comments</b> (Insert special instructions here then click email button.) <div style="border: 1px solid black; height: 40px; width: 100%;"></div>			



All that remains is that the **Submit** button is pressed. The correct code is then placed on your chart and sent to the central billing office.

[Tutorial](#)

## Evaluation and Management

**Acute Dx**

☐ Fredrickson Type IIa Hyp

☐

☐

☐

☐

☐

☐

☐

☐

☐

**Chronic Dx**

☐ DM (diabetes mellitus) ty

☐ Hypertensive retinopathy

☐ Gout

☐ BPH without urinary obst

☐ Elevated sed rate

☐ Obesity, morbid

☐ Elevated blood uric acid l

☐ Meniscus, lateral, derang

☐ Hypertension

☐ Metabolic syndrome

☐ Elevated C-reactive prote

☐ Elevated homocysteine

☐ Coronary artery disease

☐ Diastolic CHF, chronic

☐ Chronic renal disease, sl

☐ Myocardial infarct, old

☐

☐

☐

☐

☐ Clear Diagnosis Fields

**In order to see the SUMBIT button, you MUST answer the E-Prescribing code question below in red.**

**New Patients**

☐ 99201 Brief

☐ 99202 Problem Focused

☐ 99203 Expanded Problem

☐ 99204 Detailed Problem

☐ 99205 Comprehensive Problem

**Established**

☐ 99211 Brief

☐ 99212 Problem Focused

☐ 99213 Expanded Problem

☐ 99214 Detailed Problem

☐ 99215 Comprehensive Problem

☐ Observation/Discharge Management

**Nursing Home**

☐ 99304 Initial Limited

☐ 99305 Initial Extended

☐ 99306 Initial Comprehensive

☐ 99307 Subsequent Limited

☐ 99308 Subsequent Extended

☐ 99309 Subsequent Comprehensive

☐ 99310 Subsequent High Complexity

☐ 99315 NH Discharge

☐ 99316 NH Discharge, 30+ mins

☐ 99318 Nursing Facility Care, Annual

☐ 99324 Domicil, New Pt, Prob Focus

☐ 99325 Domicil, New Pt, Expanded

☐ 99326 Domicil, New Pt, Detailed

☐ 99327 Domicil, New Pt, Mod Comp

☐ 99328 Domicil, New Pt, High Comp

☐ 99334 Domicil, Est Pt, Prob Focus

☐ 99335 Domicil, Est Pt, Expanded

☐ 99336 Domicil, Est Pt, Detailed

☐ 99337 Domicil, Est Pt, Comprehensive

**Care Transition** ☐ Eligibility

☐ 99495 Transition of Care Management Within 14 days (99214 or higher)

☐ 99496 Transition of Care Management Within 7 days (99215)

**New Patients**

*Commercial Insurance only*

☐ 99381 Preventive Visit, Infant

☐ 99382 Preventive Visit, Age 1 to 4

☐ 99383 Preventive Visit, Age 5 to 11

☐ 99384 Preventive Visit, Age 12 to 17

☐ 99385 Preventive Visit, Age 18 to 39

☐ 99386 Preventive Visit, Age 40 to 64

☐ 99387 Preventive Visit, Age 65+

**Established**

*Commercial Insurance only*

☐ 99391 Preventive Visit, Infant

☐ 99392 Preventive Visit, Age 1 to 4

☐ 99393 Preventive Visit, Age 5 to 11

☐ 99394 Preventive Visit, Age 12 to 17

☐ 99395 Preventive Visit, Age 18 to 39

☐ 99396 Preventive Visit, Age 40 to 64

☐ 99397 Preventive Visit, Age 65+

**Consultation**

Referring

☐ 99241 Brief

☐ 99242 Problem Focused

☐ 99243 Expanded Problem

☐ 99244 Comprehensive Problem

**Suture Removal**

☐ 99024 Suture Removal/Packing Rem

**Medicare Preventive** ☐ Eligibility

☐ G0402 Initial Preventive Physical Exam

☒ G0438 Annual Wellness Visit, Initial

☐ G0439 Annual Wellness Visit, Subsequent

**Medicare Behavioral Therapy**

☐ G0446 Intensive Therapy - Cardiovascular Disease

☐ G0447 Intensive Therapy - Obesity

**E-Prescribing**

Was at least one prescription during the encounter generated and submitted electronically? ☒ Yes ☐ No

**Comments** (Insert special instructions here then click email button.)

### The Other Option – the Eligible Code is an IPPE (G0240)

- When the patient is in his/her first year of Medicare benefits
- When all the elements for the Medicare Preventive Exams are completed
- When the “Calculate Code Eligibility” is deployed
- When the code for which the patient is eligible is a G0402 (IPPE)



The following template will appear. This template is different than the one for the **Annual Wellness Visit** because with the **Initial Prevention Physical Exam**, it is possible to order an EKG and/or an Abdominal Ultrasound.

### Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0402 Medicare Preventive Exam. Click OK to close this template and the G0402 code will be selected for you on the next screen.*

**3. As part of the G0402 IPPE exam, you may also perform or read an EKG as a screening measure for this patient. Please select one of the following options, if you feel it is necessary. Be sure to send the patient for the test.**

☐ G0403 EKG w/Interpretation and Report  
☐ G0404 EKG w/o Interpretation and Report  
☐ G0405 EKG Interpretation and Report Only

**4. Also as part of the G0402 IPPE exam, you may order ultrasound screening for Abdominal Aortic Aneurysm (AAA). You may order this test if the patient has a history of AAA or if the patient is a 65 to 75-year-old male with a history of smoking.**

Family History of AAA?    ☐ Yes    ☒ No    Patient is eligible for ultrasound.  
 Male 65 - 75 with smoking history?    ☒ Yes    ☐ No    ☐ Check here to order ultrasound. Be sure to send the patient for the test.

  

The IPPE is a one-time, once in a life-time, benefit. (Note: The EKG and Abdominal Ultrasound are NOT allowed for an Annual Wellness Visit Initial or on an Annual Wellness Visit Subsequent, but ONLY for an Initial Prevention Physical Exam.)

If an EKG is appropriate for the patient, it should be ordered by clicking on the box next to one of three options:

1. You are doing an EKG, interpreting it and preparing a report.
2. You are doing an EKG without interpretation or report.

3. You are interpreting and preparing a report on an EKG which you did not perform.

### Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0402 Medicare Preventive Exam. Click OK to close this template and the G0402 code will be selected for you on the next screen.*

**3. As part of the G0402 IPPE exam, you may also perform or read an EKG as a screening measure for this patient. Please select one of the following options, if you feel it is necessary. Be sure to send the patient for the test.**

☐ G0403 EKG w/Interpretation and Report  
☐ G0404 EKG w/o Interpretation and Report  
☐ G0405 EKG Interpretation and Report Only

**4. Also as part of the G0402 IPPE exam, you may order ultrasound screening for Abdominal Aortic Aneurysm (AAA). You may order this test if the patient has a history of AAA or if the patient is a 65 to 75-year-old male with a history of smoking.**

Family History of AAA?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<b>Patient is eligible for ultrasound.</b> <input type="checkbox"/> Check here to order ultrasound. Be sure to send the patient for the test.
Male 65 - 75 with smoking history?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	

Check the box beside the EKG service which applies to this encounter. See below

### Medicare Preventive Exams

**1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.**

Has the patient's medical and family history been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>

**2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.**

*You may bill for a G0402 Medicare Preventive Exam. Click OK to close this template and the G0402 code will be selected for you on the next screen.*

*Don't forget to click Submit on the next screen.*

**3. As part of the G0402 IPPE exam, you may also perform or read an EKG as a screening measure for this patient. Please select one of the following options, if you feel it is necessary. Be sure to send the patient for the test.**

☒ G0403 EKG w/Interpretation and Report  
☐ G0404 EKG w/o Interpretation and Report  
☐ G0405 EKG Interpretation and Report Only

**4. Also as part of the G0402 IPPE exam, you may order ultrasound screening for Abdominal Aortic Aneurysm (AAA). You may order this test if the patient has a history of AAA or if the patient is a 65 to 75-year-old male with a history of smoking.**

Family History of AAA?	<input type="radio"/> Yes	<input checked="" type="radio"/> No	<b>Patient is eligible for ultrasound.</b>
Male 65 - 75 with smoking history?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	

☒ Check here to order ultrasound. Be sure to send the patient for the test.

Once you checked the correct EKG code, follow the below directions for determining if the patient qualifies for an Abdominal Ultrasound. Once you have gone through the below process, click OK. This closes the IPPE Medicare Preventive Exam template.

Without you performing any other function the EKG order has been added to the Radiology Template and it has been submitted to SETMA's central billing office. See below.



[Tutorial](#) **Radiology**

[\(radiology\\_cpt\\_templatehelp\)](#) ☐ Clear Diagnosis Fields

<input type="checkbox"/> <b>Chronic Dx</b> <input type="checkbox"/> Abd Pain Rebound Tende <input type="checkbox"/> Baker Cyst Syno Cyst Pc <input type="checkbox"/> Cachexia <input type="checkbox"/> Dacryocystitis Eye <input type="checkbox"/> E Coli Infection <input type="checkbox"/> Face Contusion (No Eye) <input type="checkbox"/> Gambling Pathological <input type="checkbox"/> H/CKD Benign CKD 1-4 C <input type="checkbox"/> Ichthyosis Congenita <input type="checkbox"/> Keloid Scar <input type="checkbox"/> Labial Adhesions Genital <input type="checkbox"/> Malabsorption Celiac Ricl <input type="checkbox"/> Nail Cong Anomaly Integu <input type="checkbox"/> OA, Generalized <input type="checkbox"/> DM Type II W/O Comp Cc	<input type="checkbox"/> <b>74020 Abdomen Complete</b> <input type="checkbox"/> 73610 Ankle 3 View Left <input type="checkbox"/> 73610 Ankle 3 View Right <input type="checkbox"/> 0216T Carotid IMT Testing <input type="checkbox"/> 72040 Cervical 3 View <input type="checkbox"/> 72050 Cervical Complete <input type="checkbox"/> 71010 Chest 1 View <input type="checkbox"/> 71020 Chest PA/Lat <input type="checkbox"/> 73000 Clavicle Complete <input type="checkbox"/> 72220 Coccyx/Sacrum <input type="checkbox"/> 93000 EKG <input type="checkbox"/> 73080 Elbow 3 View, Left <input type="checkbox"/> 73080 Elbow 3 View, Right <input type="checkbox"/> 70150 Facial Bones 4 View <input type="checkbox"/> 73140 Finger <input type="checkbox"/> 73550 Femur Left <input type="checkbox"/> 73550 Femur Right <input type="checkbox"/> 73630 Foot Left <input type="checkbox"/> 73630 Foot Right <input type="checkbox"/> 73090 Forearm Left <input type="checkbox"/> 73090 Forearm Right <input type="checkbox"/> 73130 Hand 3 View Left <input type="checkbox"/> 73130 Hand 3 View Right	<input type="checkbox"/> 73650 Heel 2 View Left <input type="checkbox"/> 73650 Heel 2 View Right <input type="checkbox"/> 73510 Hip Left <input type="checkbox"/> 73510 Hip Right <input type="checkbox"/> 73520 Hip Bilateral w/ Pelvis <input type="checkbox"/> 73060 Humerus Left <input type="checkbox"/> 73060 Humerus Right <input type="checkbox"/> 73560 Knee 2 View Left <input type="checkbox"/> 73560 Knee 2 View Right <input type="checkbox"/> 73562 Knee 3 View Left <input type="checkbox"/> 73562 Knee 3 View Right <input type="checkbox"/> 74000 KUB <input type="checkbox"/> 72110 L-Spine Complete <input type="checkbox"/> 72100 Lumbar 3 View <input type="checkbox"/> 70110 Mandible 4 View <input type="checkbox"/> 70130 Mastoid <input type="checkbox"/> 70160 Nasal <input type="checkbox"/> 70360 Neck, soft tissue <input type="checkbox"/> 70200 Orbits 4 - 6 View <input type="checkbox"/> 72190 Pelvis <input type="checkbox"/> 71100 Rib Left <input type="checkbox"/> 71100 Rib Right <input type="checkbox"/> 71110 Rib Bilateral	<input type="checkbox"/> 73010 Scapula Left <input type="checkbox"/> 73010 Scapula Right <input type="checkbox"/> 73030 Shoulder Left <input type="checkbox"/> 73030 Shoulder Right <input type="checkbox"/> 72202 SI Joints 3 View <input type="checkbox"/> 70220 Sinuses <input type="checkbox"/> 70260 Skull Complete <input type="checkbox"/> 73590 Tib/Fib Left <input type="checkbox"/> 73590 Tib/Fib Right <input type="checkbox"/> 73660 Toe <input type="checkbox"/> 72072 T-spine <input type="checkbox"/> 73100 Wrist 1 or 2 View Left <input type="checkbox"/> 73100 Wrist 1 or 2 View Right <input type="checkbox"/> 73110 Wrist 3 View Left <input type="checkbox"/> 73110 Wrist 3 View Right <input type="checkbox"/> 70210 Waters  <input type="checkbox"/> Medicare EKG <input checked="" type="checkbox"/> G0403 EKG w/Interpretation and Report <input type="checkbox"/> G0404 EKG w/o Interpretation and Report <input type="checkbox"/> G0405 EKG Interpretation and Report Only <input type="checkbox"/> G0367 Technical EKG <input type="checkbox"/> G0368 Professional EKG
---	---	--	--

## Determining whether the patient qualifies for an abdominal ultrasound

When the patient meets the criteria indicated below, they are eligible for an **abdominal ultrasound**. The criteria are:

1. Male
2. Between ages 65 and 75
3. Active smoker or with a history of smoking
4. Family history of aortic aneurysm

The algorithm is built into the tool and will tell you whether or not the patient is eligible.



## Medicare Preventive Exams

1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.

Has the patient's medical and family history been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="text" value="Yes"/>	<input type="button" value="Click To Complete"/>

2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.

*You may bill for a G0402 Medicare Preventive Exam. Click OK to close this template and the G0402 code will be selected for you on the next screen.*

3. As part of the G0402 IPPE exam, you may also perform or read an EKG as a screening measure for this patient. Please select one of the following options, if you feel it is necessary. Be sure to send the patient for the test.

- ☐ G0403 EKG w/Interpretation and Report  
☐ G0404 EKG w/o Interpretation and Report  
☐ G0405 EKG Interpretation and Report Only

4. Also as part of the G0402 IPPE exam, you may order ultrasound screening for Abdominal Aortic Aneurysm (AAA). You may order this test if the patient has a history of AAA or if the patient is a 65 to 75-year-old male with a history of smoking.

Family History of AAA? ☒ Yes ☐ No **Patient is eligible for ultrasound.**  
Male 65 - 75 with smoking history? ☒ Yes ☐ No ☐ Check here to order ultrasound. Be sure to send the patient for the test.

If the patient is found to be eligible for an abdominal ultrasound, an alert will appear which designates “**patient is eligible for ultrasound**” (see above in green). Check the box next to the phrase, “**Check here to order ultrasound.**” See below in green.

## Medicare Preventive Exams

1. ALL of the items below must be completed to bill for ANY of the Medicare Preventive Exams.

Has the patient's medical and family history been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's list of providers been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Have the patient's vital signs been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the functional assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the depression assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the fall risk assessment been updated/reviewed today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's code status been documented?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has the patient's visual acuity been recorded today?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>
Has either the HEDIS or NQF template been accessed today in order to create a list of future screening needs for this patient?	<input type="button" value="Yes"/>	<input type="button" value="Click To Complete"/>

2. Click below to calculate which Medicare Preventive Exam for which the patient qualifies.

*You may bill for a G0402 Medicare Preventive Exam. Click OK to close this template and the G0402 code will be selected for you on the next screen.*

3. As part of the G0402 IPPE exam, you may also perform or read an EKG as a screening measure for this patient. Please select one of the following options, if you feel it is necessary. Be sure to send the patient for the test.

- ☐ G0403 EKG w/Interpretation and Report  
☐ G0404 EKG w/o Interpretation and Report  
☐ G0405 EKG Interpretation and Report Only

4. Also as part of the G0402 IPPE exam, you may order ultrasound screening for Abdominal Aortic Aneurysm (AAA). You may order this test if the patient has a history of AAA or if the patient is a 65 to 75-year-old male with a history of smoking.

Family History of AAA? ☐ Yes ☒ No  
Male 65 - 75 with smoking history? ☒ Yes ☐ No

Patient is eligible for ultrasound

☐ Check here to order ultrasound. Be sure to send the patient for the test.

Once the visit type has been selected by clicking the **Calculate Code Eligibility** and if that code is G0402 (IPPE), after having completed the EKG and/or the Abdominal Ultrasound orders, click the **OK** button at the bottom of the **Medicare Preventive Exams** template shown above. The code for which the patient is eligible by your documentation and by CMS' criteria will automatically be placed on the Evaluation and Management template, as shown below. Then click the "**Submit**" button outlined in green below for the charges to be posted.









**\* Indicates procedures done in house**

## Referrals Template

Patient: Larry QTest Date: 20121031 Company: \_\_\_\_\_  
 Date of Birth: 02/15/1947 Time: 1:43 PM Telephone: \_\_\_\_\_  
 Phone: 4098339797 Status: In Progress Policy #: \_\_\_\_\_

Reason: Medicare IPPE  
 OR  
 Diagnosis: \_\_\_\_\_ [Click To Add Dx](#)

Notes: \_\_\_\_\_

PLEASE FILL OUT ALL FIELDS IN RED

Specialty Provider: \_\_\_\_\_  
 Referring Provider: Holly James  
 Referred To: \_\_\_\_\_  
 Facility: \_\_\_\_\_

**Special Procedures**

<input type="checkbox"/> * Arterial Blood Gas	<input type="checkbox"/> * Segmental Pressures
<input type="checkbox"/> Audiogram	<input type="checkbox"/> * Thoracentesis
<input type="checkbox"/> AV Fistula	<input type="checkbox"/> Thyroid Biopsy
<input type="checkbox"/> * Bladder Scan	<input type="checkbox"/> Thyroid Scan
<input type="checkbox"/> * Bone Density	<input type="checkbox"/> Sleep Studies - Altus
<input type="checkbox"/> Bone Scan	<input type="checkbox"/> UGI
<input type="checkbox"/> Breast Biopsy (Stereo)	<input type="checkbox"/> UGI w/Small Bowel Series
<input type="checkbox"/> Bronchoscopy	<input type="checkbox"/> Uroflowmetry
<input type="checkbox"/> * Colonoscopy	<input type="checkbox"/> V/Q Lung Scan
<input type="checkbox"/> EEG	<input type="checkbox"/> <b>Ultrasound/Sonogram</b>
<input type="checkbox"/> EGD	<input checked="" type="checkbox"/> * Abdominal U/S
<input type="checkbox"/> * EMG _____	<input type="checkbox"/> Arterial Doppler Lower Extremity
<input type="checkbox"/> ENG	<input type="checkbox"/> Breast U/S
<input type="checkbox"/> Eye Exam	<input type="checkbox"/> * Carotid Doppler
<input type="checkbox"/> Flex Sigmoidoscopy	<input type="checkbox"/> * Gallbladder U/S
<input type="checkbox"/> HIDA Scan	<input type="checkbox"/> Pelvic with Probe
<input type="checkbox"/> IVP	<input type="checkbox"/> * Renal U/S
<input type="checkbox"/> Liver Biopsy	<input type="checkbox"/> * Renal Artery U/S
<input type="checkbox"/> Mammogram	<input type="checkbox"/> * Small Parts (Testicular, Thyroid)
<input type="checkbox"/> Mod. Barium Swallow	<input type="checkbox"/> * Venous Doppler, Lower Extremity
<input type="checkbox"/> * Nerve Conduction Vel _____	<input type="checkbox"/> * MRA _____
<input type="checkbox"/> PET Scan	<input type="checkbox"/> * MRI _____
<input type="checkbox"/> * PFT	<input type="checkbox"/> * CT _____
<input type="checkbox"/> Postvoidal residual volume	<input type="checkbox"/> With Dye <input type="checkbox"/> Without Dye
<input type="checkbox"/> Renal Scan	

**Therapy**

☐ Physical Therapy  
☐ Speech Therapy  
☐ Occupational Therapy  
☐ Smoking Cessation  
☐ Medical Nutrition Therapy \_\_\_\_\_

**Medical Home**

☐ Care Coordinator  
☐ Financial  
☐ Home Health  
☐ Hospice  
☐ Social Work

**Cardiac Procedures**

☐ Adenosine Cardiople  
☐ Ambulatory BP Monitoring  
☐ \* CPET  
☐ Dobutamine Echo  
☐ \* Echocardiogram  
☐ \* Holter Monitor  
☐ IMT Vascular Study  
☐ Stress Echo  
☐ \* Stress Test  
☐ Stress Thallium

**Other Specialist**  
 \_\_\_\_\_

**Common Referrals**

☐ Cardiology  
☐ Dermatology  
☐ ENT  
☐ General Surgery  
☐ Gastroenterology  
☐ Nephrology  
☐ Neurosurgery  
☐ OB/GYN  
☐ Oncology  
☐ Orthopedics  
☐ Pain Management  
☐ Plastic Surgery  
☐ Podiatry  
☐ Urology

**SETMA Referrals**

☐ Allergy  
☐ Cardiology  
☐ CHF  
☐ Coumadin  
☐ Diabetes Education  
☐ Continuous Glucose Monitoring  
☐ Infusion Therapy \_\_\_\_\_

☐ Endocrinology  
☐ Infectious Disease  
☐ Neurology  
☐ Ophthalmology  
☐ Rheumatology

**Other Referral**  
 \_\_\_\_\_

**Report**

\_\_\_\_\_

☐ Check here ONLY if this referral is for documentation purposes only and does NOT need to be sent to the referrals department for processing.

☐ InfoSent ☐ InfoRecvd ☐ RefCom

Complete

Required only if no procedure indicated with checkboxes

Once the referral is complete, the process is complete. And, while the explanation is lengthy, the function is not. The result is that thousands of Medicare beneficiaries are going to be getting important preventive health services at no cost to them. And, not unimportantly, SETMA will receive addition revenue with which to continuing the purse of our mission to meet the healthcare needs of some of our most vulnerable neighbors.

## **Can you bill CMS for a non-preventive care E&M code during the same visit in which you bill for a Medicare Preventive Visit?**

**The answer is, “Yes,” with a couple of caveats, which are:**

1. It must be done using a modifier -25. This has been built into this function and will automatically be added to your billing when you submit a Preventive Exam code and a routine E&M code, if a Medicare Preventive Visit and an another E&M code are billed in the same patient encounter.
2. **Medicare Regulations state:** “Medicare may pay for a significant, separately identifiable medically necessary E/M service (Current Procedural Terminology [CPT] codes 99201 – 99215) billed at the same time as the IPPE when billed with modifier -25. That portion of the visit must be medically necessary to treat the beneficiary’s illness or injury, or to improve the functioning of a malformed body member.”
3. **The following is a private comment made by a physician:** “Considerable effort (has been spent) on this very issue with CMS directly so that MDs could do E/M visits at the time of the AWWs. The issue with the IPPE is the physical examination component, since for the current auditing, you need at least a 99213 PE for 99214 billing and the PE requirements for the IPPE have never been stipulated. **I do not recommend combining an E/M code with an IPPE for this reason but it is theoretically possible** and frankly I would argue that spending added time with prevention and then dealing with the E/M is the right way to do this.”
4. CMS says they "may" pay for the Preventive Code and another E&M Code in the same visit BUT...The reality is the Preventive Code's intent is to provide a benefit to the patient at no cost and for the focus to be on PREVENTION. Coincident to this preventive care, if you find an acute problem, or an exacerbation of a chronic problem, which places the patient's well-being at risk you can address that problem and bill for it. CMS "may" pay for that. BUT, you CANNOT just routinely tag a review of chronic conditions with routine laboratory tests on to a PREVENTIVE visit and expect it not to be denied.
5. **It is probably best under the current published criteria not to use an E&M code with an IPPE but it is allowable to do it with an AWW.**

## **The following are general concepts which help explain the use of the IPPE (G0402)**

- A patient who has just qualified for Medicare Part B is allowed this **once in a lifetime benefit within the first 12 months of Medicare eligibility**
- The IPPE does not include any clinical laboratory tests but referral for such tests may be part of the examination.
- Medicare may pay for a significant, separately identifiable medically necessary E/M service codes 99209-99205 billed at the same time as the IPPE when billed with modifier -25. That portion of the visit must be medically necessary to treat the beneficiary's illness or injury or to improve the functioning of a malformed body member.
- You must report a specific diagnosis code for the IPPE; you may choose any appropriate diagnosis code.
- The deductible is waived for the IPPE
- **Patient who is eligible for an IPPE cannot have an Annual Wellness Visit in the 12 months after the IPPE.**

### **Elements of IPPE**

1. Review of Medical and Social History (SETMA's History and Physical)
2. Review of beneficiary's potential risk factors for depression and other mood disorders (SETMA's Depression Questionnaire)
3. Review of the beneficiary's functional ability and level of safety (SETMA's Functional Assessment and Fall Risk)
4. Physical Examination (Height, weight, blood pressure, **visual acuity screen**, BMI, etc.)
5. End of life Planning (Code Status)
6. Education, counseling and referral based on the previous five components (SETMA's plan of care and treatment plan)

**Ultrasound Screening for Abdominal Aortic Aneurysm (AAA)** – patient must receive a referral for an AAA ultrasound screening as a result of an IPPE and must meet the criteria to have this screening ordered. Medicare will pay for this once in a lifetime benefit as long as your patient meets the following requirements:

- Beneficiaries at risk that have a family history of AAA
- Men age 65 to 75 who have smoked at least 100 cigarettes in their lifetime

### **Content of Annual Wellness Visit Initial (G0438)**

In the second year of a patient being enrolled and/or eligible for Medicare, he/she is eligible for an Annual Wellness Visit. This is paid at the rate of the 99214 visit which is approximately \$101. The difference is that once again, the entire fee is paid for by Medicare without any cost to the patient.

## **Content of G0438**

- Medical/family history
- List of current providers/suppliers
- Blood pressure, height, weight, and other routine measurements.
- Detection of any cognitive impairment
- Review potential (risk factors) for depression, functional ability, and level of safety.
- Establishment of:
  - Written screening schedule (such as a checklist) for next 5-10 years.
  - List of risk factors and conditions where interventions are recommended.
  - Personalized health advice and referrals for health education and preventive counseling

## **Annual Wellness Visit Subsequent (AWV) G0439**

### **Content of G0439 Annual Wellness Visit, Subsequent (AWV)**

- The Subsequent Annual Wellness Visit cannot take place until twelve months after the date of the Annual Wellness Visit Initial or after the last Annual Wellness Visit Subsequent.
- Update of medical/family history
- Update of list of current providers/suppliers
- Measurement of weight, blood pressure, and other routine measurements
- Detection of any cognitive impairment
- Update to:
  - Written screening schedule
  - List of risk factors and conditions where interventions are recommended.
  - Personalized health advice and referrals for health education and preventive counseling