



# The Annual Wellness Visit

## Helping your patients understand the benefits

Both the annual wellness visit (AWV) and the complete physical exam (CPE) are essential components of a patient's health care plan. Together they offer a complete picture of a patient's health to guide current treatment and prevention and assist with the planning of a long-term health care strategy:

- **Annual wellness visit:** a comprehensive review of a patient's overall health status and risk factors that can help providers detect and address health issues early on and empower patients to take charge of their health
- **Complete physical exam:** a hands-on evaluation or physical exam that addresses current health and immediate care needs

### Prioritizing annual wellness visits

As the patient's first point of contact, it's essential for primary care providers to stress the importance of the AWV in addition to CPEs, and to help patients understand the different benefits and components of each.

|          | Annual wellness visit                                                                                                                                   | Complete physical exam                                                                                                                                                                                                                             |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Purpose  | Preventive planning                                                                                                                                     | Diagnosis and treatment of current issues                                                                                                                                                                                                          |
| Coverage | <ul style="list-style-type: none"> <li>• Covered annually by Medicare</li> </ul>                                                                        | <ul style="list-style-type: none"> <li>• Not covered by Medicare</li> <li>• Patients pay 100% out-of-pocket unless covered by another insurance provider</li> <li>• Typically covered by Medicare Advantage plans</li> </ul>                       |
| Focus    | <ul style="list-style-type: none"> <li>• Review of overall health</li> <li>• Risk assessment</li> <li>• Preventive planning</li> </ul>                  | <ul style="list-style-type: none"> <li>• Direct physical examination</li> <li>• Diagnostic procedures</li> </ul>                                                                                                                                   |
| Includes | <ul style="list-style-type: none"> <li>• Check of basic vitals</li> <li>• Health risk assessments</li> <li>• Screening</li> <li>• Counseling</li> </ul> | <ul style="list-style-type: none"> <li>• Comprehensive vital signs check</li> <li>• Mental health evaluation</li> <li>• Physical evaluation</li> <li>• Measurements</li> <li>• Diagnostics</li> <li>• Medication review</li> <li>• Labs</li> </ul> |

### Preparing for an annual wellness visit

Primary care providers can help prepare patients for their first annual wellness visit by explaining what constitutes an AWV and letting them know what kind of information they will be asked to share during their appointment. Components of an annual wellness visit include:

|                                     |                                                                                                                                                                                                          |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Health Risk Assessment (HRA)</b> | <ul style="list-style-type: none"> <li>• Demographics</li> <li>• Self-assessed health status</li> <li>• Psychosocial and behavioral risks</li> <li>• ADLs and IADLs (daily living activities)</li> </ul> |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|                                             |                                                                                                                                                                                                                                                                                 |
|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Medical &amp; Social History</b>         | <ul style="list-style-type: none"> <li>• Past illnesses, surgeries, allergies</li> <li>• Medication and supplement use</li> <li>• Family medical history</li> <li>• Lifestyle habits (diet, exercise, substance use)</li> </ul>                                                 |
| <b>Screenings &amp; Measurements</b>        | <ul style="list-style-type: none"> <li>• Depression and mood disorders</li> <li>• Functional ability and fall risk</li> <li>• Cognitive impairment</li> <li>• Height, weight, BMI, blood pressure</li> <li>• Vision and gait (initial preventive physical exam only)</li> </ul> |
| <b>Planning &amp; Counseling</b>            | <ul style="list-style-type: none"> <li>• Advance care planning (ACP)</li> <li>• Opioid and substance use screening</li> <li>• Personalized health advice</li> <li>• Referrals to preventive services and community programs</li> </ul>                                          |
| <b>Social Determinants of Health (SDOH)</b> | <ul style="list-style-type: none"> <li>• Optional assessment starting in 2024</li> <li>• Focus on culturally and linguistically appropriate care</li> </ul>                                                                                                                     |

## Billing and coding reminders

When submitting claims for AWVs and CPEs, please be sure to utilize the appropriate codes below.

| Annual Wellness Visit Codes |                                                                         | Complete Physical Exam Codes |                                                 |
|-----------------------------|-------------------------------------------------------------------------|------------------------------|-------------------------------------------------|
| Code                        | Visit Type                                                              | Code                         | Visit Type                                      |
| <b>G0402</b>                | Initial preventive physical exam (IPPE); 'Welcome to Medicare' visit    | <b>99386</b>                 | Initial preventive medicine new pt age 40-64    |
| <b>G0438</b>                | Annual wellness visit; initial visit, includes full HRA and screenings  | <b>99387</b>                 | Initial preventive medicine new pt age ≥ 65 yrs |
| <b>G0439</b>                | Annual wellness visit; subsequent visit; annual follow-ups, assessments | <b>99396</b>                 | Periodic preventive med est pt 40-64 yrs        |
| <b>G0468</b>                | Federally Qualified Health Center Visit                                 | <b>99397</b>                 | Periodic preventive med est pt age ≥ 65 yrs     |

- During an AWV, if a separate issue is addressed, providers may bill modifier 25, which may trigger a cost to the patient.
- Providers are encouraged to address all patients' needs during an AWV so they understand why they could receive a bill for a portion of the visit.

## Calendar year reminder

CarePartners of Connecticut uses a calendar year (Jan. 1 through Dec. 31) for coverage of annual wellness visits. This means that a member can schedule a wellness visit fewer than 365 days after their previous visit as long as the visits are in different calendar years, as shown in the example below.

| Date of wellness visit | Previous wellness visit | Coverage                                       |
|------------------------|-------------------------|------------------------------------------------|
| April 1, 2026          | Nov. 15, 2025           | Covered visit                                  |
| Dec. 31, 2026          | Jan. 1, 2026            | Not covered due to being in same calendar year |