

Annual Wellness Visit Checklist

Pre-Visit Preparation

1. Verify Eligibility:

- Verify that the patient has been enrolled in Medicare for over twelve months.
- Confirm that the patient has not had a wellness visit or a "Welcome to Medicare" preventive visit in the past twelve months.

2. Communicate Requirements and Expectations:

- Clearly communicate the purpose of the AWV to the patient.
- Explain that the AWV does not include a physical exam or diagnostic procedures.

3. Health Risk Assessment (HRA):

- Encourage the patient to complete a health risk assessment (HRA).
- Ensure that the HRA is completed either digitally before the appointment or in-office.

During the AWV

1. Identify Current Medical Providers:

- Create a record of the patient's current medical providers, including pharmacies and medical equipment suppliers.

2. Routine Measurements:

- Collect vital information, including weight, blood pressure, and body mass index.

3. Cognitive Assessment:

- Assess the patient's cognitive function to detect any signs of decline.

4. Mental Health Assessment:

- Screen for mental health conditions, such as depression, using appropriate tools and resources.

5. Everyday Living and Safety Assessment:

- Evaluate the patient's ability to perform daily activities and assess their living environment for safety concerns.

6. Document Risk Factors:

- Compile a list of potential risks and associated treatment options based on information gathered during assessments.

7. Provide a Plan for the Future:

- Create a personalized plan with medical advice and strategies for addressing identified risks.
- Develop an actionable screening schedule for recommended preventive medicine screenings over a 5-10-year period.
- Ensure that the patient receives a physical copy of both the personalized patient plan and preventive screening schedule.

8. Optional: Advanced Care Planning (ACP):

- Discuss and document issues related to advanced care planning, such as medical decision-makers and preferences for medical interventions, as per the patient's discretion.

Coding and Billing

1. Coding and Billing Correctly:

- After the AWV appointment, make sure that you follow the rules for Medicare AWV coding and billing correctly.

Additional Comments/Notes: