

Medicare 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 AWW to the patient.
- Explain that the AWW does not include a physical exam or diagnostic procedures.

3. Health risk assessment (HRA)

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

During the AWW

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

Additional comments/notes