

MEDICARE ANNUAL WELLNESS VISIT CHECKLIST



The Medicare Annual Wellness Visit (AWV) is a preventive service designed to help beneficiaries develop or update a personalized prevention plan based on their health status and risk factors. Below is a comprehensive checklist for both patients and providers to ensure a successful AWV.

Checklist for Patients

BEFORE THE VISIT BRING NECESSARY INFORMATION:

- Names and specialties of all your doctors.
- A complete list of medications, including dosages and how they are taken.
- Recent test results (e.g., blood tests, colonoscopies).
- Immunization records.
- A copy of any advance directives or living wills.

DURING THE VISIT

- Health Risk Assessment:** Complete a health risk assessment that includes questions about daily living activities, emotional health, and social support.
- Routine Measurements:** Height, weight, blood pressure, and body mass index (BMI).
- Review Medical History:** Discuss your medical and family history, including any hereditary conditions.
- Preventive Services Discussion:** Review and update preventive services and screenings based on age and risk factors.
- Personalized Prevention Plan:** Develop or update a personalized prevention plan that includes recommendations for screenings and lifestyle changes.

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Checklist for Providers

BEFORE THE VISIT

- Verify Patient Eligibility:** Ensure the patient has been enrolled in Medicare for over 12 months and has not had an AWW in the past year.
- Communicate Expectations:** Inform the patient about what to expect during the visit and clarify that it is not a physical exam.

DURING THE VISIT

- Conduct Health Risk Assessment:** Gather self-reported information on health status, psychosocial risks, and activities of daily living.
- Measure Vital Signs:** Record height, weight, BMI, and blood pressure.
- Document Medical History:** Collect detailed medical and family history, including current medications and any relevant health events.
- Identify Risk Factors:** Document potential health risks and discuss them with the patient. Think positive and be persistent.
- Create a Personalized Plan:** Provide a written plan that includes preventive services, screenings, and lifestyle recommendations.
- Schedule Follow-up:** Discuss and schedule any necessary follow-up appointments for screenings or additional services.

AFTER THE VISIT

- Correct Coding and Billing:** Use appropriate HCPCS codes (G0438 for initial AWW and G0439 for subsequent visits) for billing.
- Document the Visit:** Ensure all findings and plans are documented in the patient's medical record.

This checklist serves as a guide to ensure both patients and providers are prepared for the Medicare Annual Wellness Visit, facilitating a comprehensive approach to preventive health care