**MEDICARE WELLNESS VISITS ~ CLINICAL WORKFLOW FOR REQUIRED ELEMENTS OF THE MWV**

### MEDICARE WELLNESS VISIT TYPES

#### MEDICARE PART B AND MEDICARE ADVANTAGE PLANS

**Welcome to Medicare (IPPE):**
First 12 months of Medicare enrollment

**Initial Annual Wellness**
One year + 1 day of Medicare Enrollment

**Subsequent Medicare Wellness**
One year + 1 day from last wellness visit

**Medicare Advantage Plans**
Plans that will pay for a PE on the same day as a Medicare Wellness Visit:

*All payers except AETNA*

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### PREVISIT PLANNING

Scan schedule for MC Part B or MA patient with follow-up visits scheduled:
1) Has patient had a MWV in past year? If no, then:
2) Can visit be extended to MWV? If yes, then:
   → Schedule MWV (Note the visit type as either):
   a) Welcome to Medicare
   b) Medicare Annual Visit Initial or Subsequent
3) Does patient have Medicare Advantage Plan that covers CPE on the same day as MWV? If yes, then:
   a) Add PE to the visit

- Review visit type and update EMR (pull correct templates)
- Is the visit a Welcome to Medicare Visit? If yes, then:
  1) Flag to do Visual Acuity Screening
  2) Does patient need EKG? (ck w/ provider)
- Identify gaps in care per pre-visit planning protocols
- Enter standing orders or referrals needed

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### ROOMING PATIENT

- Welcome to Medicare visit? If yes
  Vision Acuity Screening
  EKG? (per provider)
- Vitals
- Social History
  Document smoking status
  Document alcohol use
  Document any drug use
- Quick Questions
  Safety Question
- PHQ9 Questionnaire
  Perform Depression Screening
- Health Risk Assessment
  Review and enter Questions 10-17 from HRA Form
- Cognitive and Functional Status
  Ask Hearing question
  Ask Memory question
- Amb Fall Risk Assessment
  Perform fall risk screening
- Med Reconciliation
- Advanced Directive
  If patient does not have an AD provide to patient
- Care Teams
  Update care team info

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**RHCs Exceptions:**
- Bill IPPE and E/M same day: YES
- Bill AWV and E/M same day: NO
- Medicare Advantage bill IPPE or AWV and CPE same day: YES

*Patient benefit packages may vary*