

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***

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***

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

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