

SCHEDULING A WELLNESS VISIT OR PHYSICAL

SCHEDULE A WELLNESS VISIT OR PHYSICAL DUE TO:

- Patient request
- Provider's Order
- Part of population Health reminders/outreach

Schedule Wellness Visit or Physical

Review Insurance Information in Demographics

Schedule Physical (AWVs do not apply)

Does patient have Medicare or Medicare Advantage?

YES

Schedule Appt type **Medicare Wellness Visit**

NO

Has patient been on Medicare less than 12 months?

YES

Enter **Welcome to Medicare** in appt notes

How to search appt types

Three ways to search Appt Type History:

- 1) Chart review (use filter or sort feature for RFV)
- 2) Appt history – Procedure = Appt Type
- 3) Transaction inquiry – Procedure = G0402 (IPPE), G0438 (Initial) or G0439 (Subsequent)

Has patient had **Initial Medicare Wellness Visit**?

YES

Enter **Subsequent Annual Wellness Visit** in appt notes

NO

Enter **Initial Wellness Visit** in appt notes

PATIENT PACKET FOR MEDICARE WELLNESS VISITS

FOLLOW YOUR OFFICE PROTOCOL

OPTIONS:

- 1) If **MyChart active**: Notify pt. they will automatically receive notification to complete documents through MyChart 2 weeks prior to the scheduled Medicare Wellness
- 2) **Mail** packet to patient
- 3) Packet **given to patient** on the day of MWV appt

