

Name of Practice: _____

Staff Name: _____

Medicare Annual Wellness Visit Process – Front Desk Staff

Date	Reviewed By:	Reviewed With:	
			Medicare Annual Wellness Visit Overview
			Reviewed the purpose of a Medicare Annual Wellness Visit (AWV)
			Reviewed the difference between a Medicare Annual Wellness Visit (AWV) and a Preventative Wellness Visit (PWV)
			Reviewed the difference between the IPPE (Welcome to Medicare), AWV (Initial Annual), and Subsequent AWV (Subsequent Annual)
			Scheduling/Pre-Visit Review
			Reviewed how to check insurance coverage and prior visit history to determine the type of visit (IPPE, AWV, or Subsequent AWV)
			Explained that an AWV pre-visit packet needs to be mailed to the patient prior to the office visit
			Discussed that when making reminder calls the patient should be informed to arrive 20 minutes early if they did not receive the pre-visit packet or they are unable to complete on their own
			AWV pre-visit packet
			Explained that the patient should be asked if the pre-visit packet is complete upon arrival (and the MA should be informed if assistance is needed)
			Post-Visit
			Discussed the process for making sure patients receive a written plan of care and other visit documentation
			Explained that the AWV forms should be scanned into the EHR, <i>after</i> :
			The provider reviews and <i>signs</i> the forms
			The MA enters the visit information into the EHR
			Billing Codes
			Reviewed billing codes and specifications for each type of Medicare AWV

Medicare Annual Wellness Visit Competency Checklist – Front Desk Staff

Date	Observed By:	Record Checked By:	
			Scheduling/Pre-Visit Review
			Checked insurance coverage and visit history to determine the type of visit (IPPE, AWV, or Subsequent AWV)
			Mailed the AWV pre-visit packet if necessary
			Told the patient to arrive 20 minutes early if pre-visit packet was not received or unable to complete on their own
			AWV pre-visit packet
			Asked if the pre-visit packet is complete and informed MA if assistance is needed
			Post-Visit
			Provided the patient with a written plan of care and other visit documentation
			Confirmed that the provider reviewed and <i>signed</i> the AWV forms
			Confirmed that the MA entered the visit information into the EHR
			Scanned the AWV forms into the EHR