

Name of Practice: _____

Staff Name: _____

Medicare Annual Wellness Visit Process – Medical Assistants

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
			Pre-Visit Review
			Reviewed how to check insurance coverage and prior visit history to determine the type of visit (IPPE, AWV, or Subsequent AWV)
			Reviewed the need to check patients' record of preventative screenings and inform provider of screenings needed
			Critical Components of the AWV pre-visit packet
			Reviewed the importance of asking about EACH medication when reconciling the medication list
			Reviewed the importance of checking EACH preventative screening listed in the packet and making a note of those not listed the pre-visit review documentation
			Reviewed the PHQ-2 (If not completed in the packet, explained that both PHQ-2 questions should be asked <i>individually</i>)
			Reviewed the PHQ-9 (If either PHQ-2 question is answered YES, explained that the PHQ-9 should be completed)
			Assessment
			Explained how to complete the Mini-Cog assessment
			Post-Visit
			Discussed the process for reviewing referrals given and answering patient questions
			Reviewed the need to update the EHR to reflect current preventative screening status
			If needed, request screening records from outside sources (i.e., flu shot from CVS)
			Input new screening information when records are received
			Billing Codes
			Reviewed billing codes and specifications for each type of Medicare AWV

Medicare Annual Wellness Visit Competency Checklist – Medical Assistants

Date	Observed By:	Record Checked By:	
			Pre-Visit Review
			Checked insurance coverage and visit history to determine the type of visit (IPPE, AWV, or Subsequent AWV)
			Checked patients' record of preventative screenings and informed provider of screenings needed
			Critical Components of the AWV pre-visit packet
			Completed medication reconciliation (Asks about EACH medication)
			Reviewed EACH preventative screening
			Reviewed PHQ-2 questions (if needed, asked both questions individually)
			Completed the PHQ-9, if necessary
			Assessment
			Demonstrated ability to properly complete the Mini-Cog assessment
			Post-Visit
			Reviewed referrals given and answered patient questions
			Updated EHR to reflect current preventative screening status
			Requested screening records if needed
			Input new screening information when received