

# 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

Does patient have Medicare or Medicare Advantage? - Check for eligibility date

Schedule Physical (AWVs do not apply)

Schedule Appt type **Medicare Wellness Visit**

Has patient been on Medicare less than 12 months?

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

Enter **Initial Wellness Visit** in appt notes

Enter **Welcome to Medicare** in appt notes

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

## PATIENT PACKET FOR MEDICARE WELLNESS VISITS - FOLLOW YOUR OFFICE PROTOCOL OPTIONS:

- 1) If patient has signed up for and uses their patient portal, add the packet to the portal and ask patient to complete prior to their visit.
- 2) Mail the packet to the patient.
- 3) Packet given to the patient on the day of their appt.

YOUR LOGO HERE

**Three ways to search Appt Type History:**

- 1) Chart review
- 2) Appt history - Procedure = Appt Type
- 3) Transaction inquiry - Procedure = G0402 (IPPE), G0438 (Initial) or G0439 (Subsequent)

How to search appt type

