

Proper Documentation for Medicare's Annual Wellness Visit

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Passion for excellence. Compassion for people.



Agenda

- Introductions
- Who is Aspirus Health?
- What is a Medicare Wellness Visit?
- Obtaining the necessary information for an Annual Wellness Visit
- How to depart the patient with the proper documents
- Questions

Tony Evans, RHIA



- Graduated from St. Scholastica in 2012 with a Bachelors Degree in Health Information Management
- 12 years experience in customer service, Coding Education, Professional Coding, Documentation Improvement, and Management
- Current Professional Coding Manager at Aspirus – St. Luke’s Hospital

About Aspirus Health



Aspirus Health's Mission

We Are a Non-Profit Organization Committed to
Creating Strong, Healthy Communities

- At Aspirus Health, our mission is to heal people, promote health and strengthen communities.

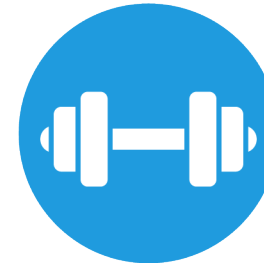
HEAL PEOPLE



PROMOTE HEALTH



STRENGTHEN COMMUNITIES



Our Vision

We Commit to Helping the Communities We Serve Thrive

- At Aspirus Health, we are a catalyst for creating healthy, thriving communities, trusted and engaged above all others.

VISION



Aspirus Health's Values

Our Values Define Team Behavioral Expectations

COMPASSION



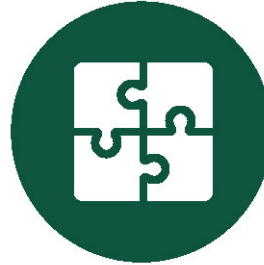
We demonstrate caring in all we do and cherish the honor of improving lives.

ACCOUNTABILITY



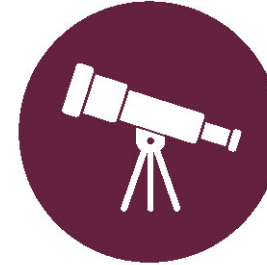
We commit to our work, recognize our power to make a difference, and embrace the responsibility to advocate for each person we serve.

COLLABORATION



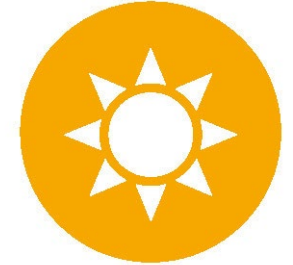
As a team we improve our patients' lives; through partnerships we improve the health of our communities.

FORESIGHT



We plan and act today to impact the future and sustain and grow vital resources for those who need us.

JOY



We work with happiness and enthusiasm; we celebrate successes and build a positive environment.

Medicare's Annual Wellness Visit

What is it?



- Introduced in 2011
- Any/all Medicare patients who have been enrolled for at least 12mo
- No cost to patient
- Helps close gaps in preventive care, improve patient-provider relationships, and facilitate advance care planning.
- Can be completed every 366 days

Medicare's Annual Wellness Visit

What it's NOT!

- Annual Physical
 - Problem Focused visit
 - Free healthcare
-
- *Note: The visit can cover other health issues, however there could be a charge to the patient depending on their insurance*



Wellness Exams: What Is Covered?



| | Welcome To Medicare (IPPE) | First Annual Wellness Visit (Initial AWW) | Annual Wellness Visit (AWV) | Annual Physical |
|--|---|---|---|---|
| What is it? | First, and one time only, appointment after starting Medicare Part B. Must be within the first 12 months of starting Medicare Part B. | If patient does not do Welcome to Medicare within first 12 months OR if it has been greater than 12 months since Welcome to Medicare visit. | Annually, after the initial AWW with at least 366 days elapsing from the last AWW | NOT covered by Medicare Secondary insurance MAY cover this; verify with insurance before scheduling appointment. Subject to deductible. |
| Assess Cognitive Function | ✓ | ✓ | ✓ | |
| Blood Work, Lab Tests | | | | ✓ *If Screening, or a known existing diagnosis |
| Co-Payment Required | | | | ✓ |
| Evaluation of New Health Concerns | | | | |
| Height, Weight, Blood Pressure, BMI | ✓ | ✓ | ✓ | ✓ |
| Offer to Discuss Advance Directive & Personalized Prevention Plan | ✓ | ✓ | ✓ | |
| Physical Exam/ Review of Systems | *Simple Vision Test, EKG if Applicable | | | ✓ |
| Visual Acuity | ✓ | | | |
| Falls Screening | ✓ | ✓ | ✓ | |
| Opioid Screening | ✓ | ✓ | ✓ | |
| Preventive Screenings for Diabetes, Breast, Prostate, Colon, & Cervical Cancer | ✓ | ✓ | ✓ | ✓ |
| Review Functional Ability & Level of Safety (Fall Risk) | ✓ | ✓ | ✓ | *Optional |
| Review Medications | ✓ | ✓ | ✓ | ✓ |
| Review Risk Factors for Depression & Other Mood Disorders | ✓ | ✓ | ✓ | ✓ |
| Review Medical & Family History | ✓ | ✓ | ✓ | ✓ |
| Treatment of Existing Issues | | | | |

Types of Wellness Visits

Initial Preventative Visit – Welcome to Medicare (IPPE)

- CPT Code: G0402
 - Eligibility: First 12 months of Medicare Enrollment
 - Review of medical history, social history and preventative services education
 - Once in a lifetime benefit to Medicare Part B enrollees
 - No co-pay or deductible for patient
-
- There are limited services that Medicare covers on a preventative basis which can be ordered by their provider (e.g. low dose CT screening for those who were previous smokers)

Types of Wellness Visits

Initial Annual Wellness Visit

- CPT Code: G0438
 - Eligibility: Anytime after the first 12 months of Medicare Enrollment
 - Perform health risk assessment and develop a personalized prevention plan
 - Once in a lifetime benefit to Medicare Part B enrollees
 - No co-pay or deductible for patient
-
- There are limited services that Medicare covers on a preventative basis which can be ordered by their provider (e.g. low dose CT screening for those who were previous smokers)

Types of Wellness Visits

Subsequent Annual Wellness Visit

- CPT Code: G0439
 - Eligibility: Annually after initial AWW with at least 366 days elapsing from last AWW
 - Perform health risk assessment and develop a personalized prevention plan
 - Annual benefit to Medicare Part B enrollees
 - No co-pay or deductible for patient
-
- There are limited services that Medicare covers on a preventative basis which can be ordered by their provider (e.g. low dose CT screening for those who were previous smokers)

Required Documentation

Welcome to Medicare (IPPE) and Initial Annual Wellness Visit

- Demographic Data
- Self-assessment of health
- Psychosocial Risks
- Behavioral Risks
- Medical History
- Social History
- Patient's provider list
- Vitals: height, weight, BMI, blood pressure
- Vision screening *IPPE only
- Cognitive Function Assessment
- Patient risk factors for depression
- Patient fall risk
- Ability to perform Activity of Daily Living (ADL) and Instrumental Activities of Daily Living (IADL)
- Hearing Impairment
- Home safety
- Establishing an appropriate screening schedule for next 5-10 years
- Establishing a list of risk factors and what interventions are recommended
- Documentation of personalized health advice, education and appropriate referrals
- Documentation of any requested advance health care planning service provided/discussed

Required Documentation

Subsequent Annual Wellness Visit

- Demographic Data
- Self-assessment of health
- Psychosocial and Behavioral Risks
- Medical History
- Social History
- Patient's provider list
- Vitals: weight, BMI, blood pressure
- Cognitive Function Assessment
- Documented ability to preform Activity of Dailey Living (ADL) and Instrumental Activities of Daily Living (IADL)
- Update screening schedule
- Update list of risk factors and which interventions are recommended/underway
- Update personalized health advice, education, preventive counseling and referrals
- Documentation of any requested advance health care planning service provided/discussed

Aspirus SL DLH Woodland Ave
1400 WOODLAND AVE
DULUTH, MN 55803-2624
218-249-8800

10/15/24

Dear ____, Date of Birth: _____

You are scheduled for your Medicare Annual Wellness Visit on --/--/24 at am/pm with Dr. Kristina M Lindholm, MD.

Please arrive to the clinic with your completed forms no later than 15 minutes prior to your appointment time. These forms are also available for you to complete on your Aspirus St. Luke's myCare Patient Portal. Bring all of your current insurance cards and a photo ID. Please review the details of this visit below.

What should I expect at my appointment?

Your appointment will last about 30 minutes. The first 20 minutes will be spent with a Medical Assistant or RN reviewing preventative services (see below for details) and developing or updating a personalized wellness plan to help prevent disease or disability based on your current health and risk factors. The final 10 minutes will be spent with your provider reviewing and validating your personalized plan with you. **The annual "wellness visit" is not a physical exam.**

How much does the visit cost?

Medicare covers 100% of the visit but it ONLY covers preventative services. Please see below for details regarding this.

What does "preventative services" mean?

Medicare sets guidelines on what these services can include. Please see list below:

- Vital measurements (height, weight, BMI, blood pressure)
- Personal medical/surgical history
- Family medical history
- Immunization history
- Current providers (i.e.: specialists)
- Screening services you may be eligible for (i.e. mammogram, pap smear, colonoscopy, blood sugar, cholesterol, etc.) and written lists of what services you may need
- Personalized health advice
- Discussion about advanced directives
- Smoking cessation counseling, if indicated

What services are not covered with an annual "Wellness Visit?"

- A full physical examination
- Acute illnesses (i.e.: rashes, colds, pain, earaches, ear flushes, etc.)
- Chronic disease management (i.e.: diabetes, blood pressure, cholesterol)

- Medication questions or changes

What should I do if I have things to discuss that are not covered by Medicare during my "Wellness Visit?"

Please schedule a separate appointment to discuss specific health care concerns with your provider. If other issues are discussed during this visit you may have to pay towards your Medicare Part B deductible and/or coinsurance. Please check with your insurance prior to your appointment if you have questions regarding what is covered. Visit [medicare.gov/coverage/yearly-wellness-visits](https://www.medicare.gov/coverage/yearly-wellness-visits) for more information.

Is the Medicare Annual "Wellness Visit" Mandatory?

Although it is highly recommended, it is not mandatory to maintain your Medicare Part B coverage.

Please call us at 218-249-8800 if you have any questions about your upcoming appointment.

Thank you

Aspirus SL DLH Woodland Ave

Required for all three types of AWVs

Please complete the questions below to the best of your ability.

1. During the past 4 weeks, how much have you been bothered by emotional problems such as feeling anxious, depressed, irritable, sad or downhearted and blue?

- Not at all
- Slightly
- Moderately
- Quite a bit
- Extremely

2. During the past 4 weeks, has your physical and emotional health limited your social activities with family, friends, neighbors or groups?

- Not at all
- Slightly
- Moderately
- Quite a bit
- Extremely

3. During the past 4 weeks, how much bodily pain have you generally had?

- No pain
- Very mild pain
- Moderate pain
- Severe pain

4. During the past 4 weeks, was someone available to help you if you needed and wanted help? For example, if you felt nervous, lonely or blue, got sick and had to stay in bed, needed someone to talk to, needed help with daily chores, or needed help just taking care of yourself.

- Yes, as much as I wanted
- Yes, quite a bit
- Yes, some
- Yes, a little
- No, not at all

5. What was the hardest physical activity you could do for at least 2 minutes?

- Very heavy
- Heavy
- Moderate
- Light
- Very light

6. Can you get places out of walking distance without help? For example, can you travel alone by bus, taxi, or drive your own car?

Yes No
[] []

7. Can you shop for groceries or clothes without help?

[] []

8. Can you prepare your own meals?

[] []

9. Can you do your own housework without help?

[] []

10. Can you handle your own money without help?

[] []

11. Do you need help eating, bathing, dressing or getting around your home?

[] []

12. During the past 4 weeks, how would you rate your health in general?

- Excellent
- Very good
- Good
- Fair
- Poor

13. How have things been going for you during the past 4 weeks?

- Very well - could hardly be better
- Pretty good
- Good and bad parts about equal
- Pretty bad
- Very bad - could hardly be worse

14. Are you having difficulties driving your car?

- Yes, often
- Sometimes
- No
- Not applicable, I do not use a car

15. Do you always fasten your seat belt when you are in a car?

- Yes, usually
- Yes, sometimes
- No

16. How often during the past 4 weeks have you been bothered by any of the following problems?

1=Never; 2=Seldom; 3=Sometimes; 4=Often; 5=Always

Fall or dizzy when standing up
[1] [2] [3] [4] [5]

Sexual problems
[1] [2] [3] [4] [5]

Trouble eating well
[1] [2] [3] [4] [5]

Teeth or dentures
[1] [2] [3] [4] [5]

Problems hearing on the telephone
[1] [2] [3] [4] [5]

Tired or fatigued
[1] [2] [3] [4] [5]

17. Do you exercise for about 20 minutes 3 or more days a week?

- Yes, most of the time
- Yes, some of the time
- No, I usually do not exercise this much

18. Have you been given any information to help you with the following:

a) Hazards in your house that might hurt you?

- Yes
- No

b) Keeping track of your medications?

- Yes
- No

19. a) How often do you have trouble taking medicines the way you have been told to take them?

- I do not have to take medicine
- I always take them as prescribed
- Sometimes I take them as prescribed
- I seldom take them as prescribed

b) Have you used any prescription medication just for the feeling, more than prescribed, or that were not prescribed to you?

- Yes
- No

20. How confident are you that you can control and manage most of your health problems?

- Very confident
- Somewhat confident
- Not very confident
- I do not have any health problems

21. Do you feel unsteady when standing or walking?

- Yes
- No

22. Do you worry about falling?

- Yes
- No

23. Have you fallen in the past year?

- Yes
- No

a) How many times? _____
b) Were you injured?

- Yes
- No

On their way!

Sending the patient home with the correct paperwork

- Personalized prevention plan of service (PPPS) and updated medication list
- PPPS includes:
 - comprehensive review of medical and family history
 - current medications
 - vital signs (height, weight, blood pressure)
 - risk factor assessment
 - personalized health advice based on individual needs
 - appropriate preventive screenings
 - referrals to health education or counseling services
 - plan for managing chronic conditions, if applicable, all tailored to the patient's specific health situation

References

- <https://www.alz.org/media/documents/factsheet-medicare-annual-wellness-visit-2017.pdf>
- <https://www.novitas-solutions.com/webcenter/portal/MedicareJL/pagebyid?contentId=00219104>
- <https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/preventive-services/medicare-wellness-visits.html>

Thank you.