

Welcome to Medicare Visit Workflow for Providers

Cerner PowerChart Ambulatory EDUCATION

A Welcome to Medicare Visit/Initial Preventive Physical Exam (IPPE) can be completed once per patient’s lifetime within the first 12 months after the patient’s Medicare Part B enrollment date. This document outlines the recommended workflow for completing a Welcome to Medicare Visit. The visit is completed as a joint effort between the provider and clinical staff. Some steps may be completed by the clinical staff, but if not, should be completed by the provider. Clinical staff will document the patient intake using the Medicare Annual Wellness Visit PowerForm.

Welcome to Medicare Visit Workflow

Open the patient’s chart from the Ambulatory Organizer and navigate to the AMB Specialty Workflow.

Time	Duration	Patient
Clinic - Munson Family Practice Center		
8:00 AM	15 mins	CERNED, ANGUS 71 Years, Male

- Review and update the Histories component.**

- Review chronic Problems, as needed, which are based on the Problem List component.
 - Click Complete Reconciliation to reconcile the patient’s Problems.
- Review and/or update Procedure history.
 - Click Mark as Reviewed once Procedure history has been reviewed.
- Review and/or update Family history.
 - Review medical events in the beneficiary’s family, including diseases that may be hereditary or place the beneficiary at risk.
- Review and/or update Social history.
 - Include any history of alcohol, tobacco, and illicit drug use.

- Review and reconcile the Allergies component.**

This is part of the clinical staff process but needs to be reviewed by the provider for accuracy.

- Click Complete Reconciliation to reconcile the patient’s allergies.

- Review and reconcile the patient’s Home Medications.**

Within the Home Medications component, click the Outpatient hyperlink to reconcile the patient’s home medications. Once completed, click Reconcile and Sign.

- All home medications, calcium, vitamins, and supplements must be included.

- Review the beneficiary’s potential risk factors for depression and other mood disorders.**

If not previously completed by clinical staff, providers can utilize the PHQ-2 and PHQ-9 screening tool located within the Scales and Assessments component of the AMB Workflow. Otherwise, previously recorded results from clinical staff can be reviewed within the component.

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- Complete the Problem List.**

Add the Welcome to Medicare preventative visit problem to the Problem List and any other problems that were addressed this visit. Assign a priority level of 1 to the Welcome to Medicare preventative visit problem and assign subsequent priority levels to other problems addressed this visit.

Priority	Problem Name	Code	Onset	Classification	Actions
1	Welcome to Medicare preventative visit	Z00.00 (ICD-10-CM) --		Medical	<input checked="" type="checkbox"/> This Visit <input type="checkbox"/> Chronic

- Complete the Objective/Physical Exam free text component.**

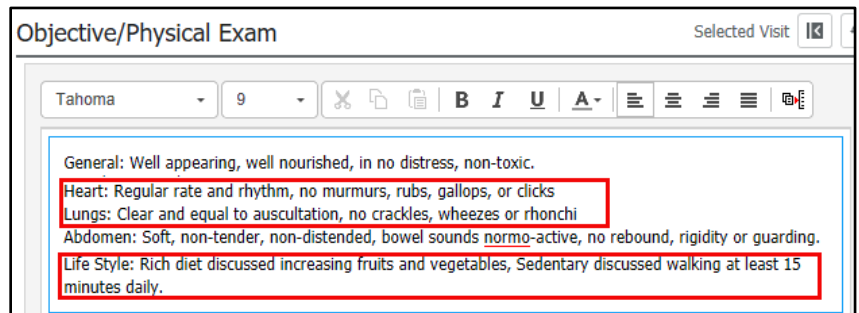
The following are portions of the Annual Wellness Visit document created by clinical staff that need to be included in the provider's note. To tag text, highlight the text and click tag, or with the free text components set to contextual view (split screen), highlight the text, then drag and drop the text into a free text component.

<p>The Healthcare Decision Maker – Medicare. Document the patient's end-of-life planning and the provider's agreement with the patient pertaining to:</p> <ul style="list-style-type: none"> The patient's ability to prepare an advance directive in case an injury or illness causes the patient to be unable to make health care decisions. Whether or not the provider is willing to follow the patient's wishes as expressed in an advance directive. 	
<p>Opioid Risk Tool</p> <ul style="list-style-type: none"> If concerns are identified in the risk factors completed by the clinical staff, further assessments or referrals should be completed, as indicated. If appropriate, refer them for treatment. A screening tool isn't required but may be used. 	
<p>Infections Disease Risk Screening (include if completed, not required)</p>	
<p>Health Risk Assessment (include if completed, not required)</p>	
<p>Functional Assessment</p>	
<p>Hearing and Vision Screening</p>	

Home Safety Screening	
Mini-Cog (include if completed, not required)	
Conley Fall Risk Scale	
Instrumental ADL Adult	

The following are not included in the Medicare Wellness Visit created by the clinical staff and needs to be included in the Physical Exam:

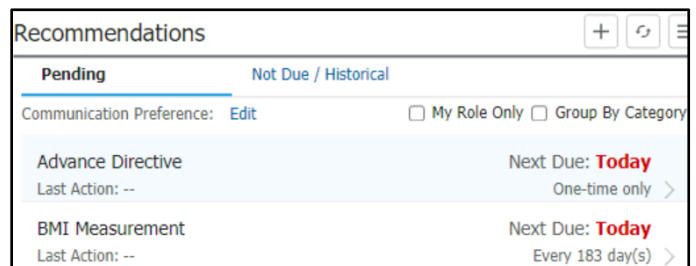
1. Nutrition.
2. Physical Activity.
3. Heart and Lung.



- **Address all recommendations due today.**

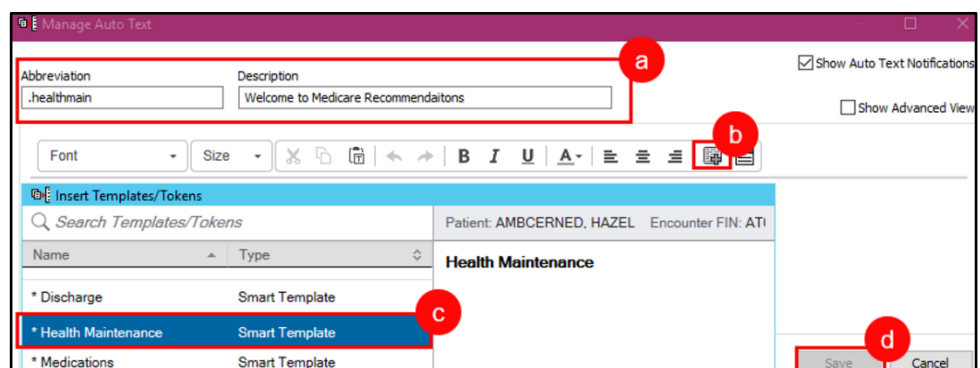
Educate, counsel, and refer for other preventive services and include a brief written plan, such as a checklist, for the patient to obtain the services, including:

1. A once-in-a-lifetime screening electrocardiogram (EKG/ECG)
 - a. Order an in-office ECG Order.
 - b. IDC10 code: Z00.00
2. Order appropriate screenings based on the Recommendations component and other preventive services that Medicare covers.



- **Provide the patient with a written plan regarding individual recommendations.**

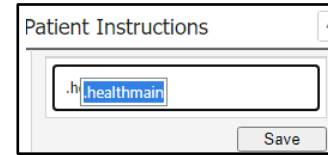
1. Create a Health Maintenance Auto Text.
 - a. Add an Abbreviation and Description.
 - b. Click Insert Templates/Tokens.
 - c. Select *Health Maintenance Smart Template.
 - d. Click Save.



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2. Insert the Health Maintenance Auto Text into the Patient Instructions component. This will automatically carry over to the Ambulatory Clinical Summary, which is printed for the patient at the end of their visit.



- **Provide education, counseling, and a referral, if applicable.**

Complete as appropriate based on the previous components. For example, if the patient has a new heart issue, refer to cardiology.

- **Review any current opioid prescriptions.**

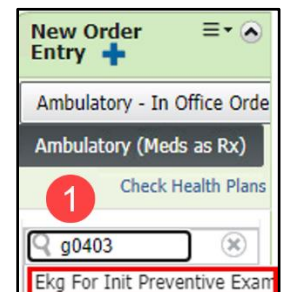
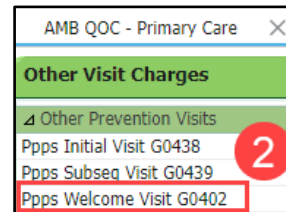
For a patient with a current opioid prescription:

1. Review the patient's potential Opioid Use Disorder (OUD) risk factors. This can also be tagged from the clinical staff note if it was completed.
2. Evaluate the patient's pain severity and current treatment plan.
3. Provide information on non-opioid treatment options.
4. Refer to a specialist, as appropriate.

- **Add appropriate charges and any orders needed.**

Orders and charges must be added manually using the QOC (Quick Orders and Charges) MPage.

1. Enter the EKG charges for Init Preventative Exam (G0403)
2. Select the Welcome to Medicare Visit charge (G0402)



Create the Dynamic Documentation Note

Document the patient's visit using the **Medicare Wellness Exam Note**.

1. Select More under Create Note at the bottom of the AMB Specialty Workflow.
2. Click Select Other Note.
3. Search for and select Medicare Wellness Exam.
4. Change the Note Type List Filter to All.
5. Change the Type to Annual Wellness Office Visit Note.
6. Click OK.

