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Clinical EHR Education, November 14, 2023 (P)

Welcome to Medicare Visit Workflow for Providers

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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
	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.	Procedure	2 Family Incomplete	3 Social
 2. Review and/or update Procedure history. a. Click Mark as Reviewed once Precedure history has been review 3. Review and/or update Family history. 	wed.	Incomplete Ma	ark as Reviewed
a. Review medical events in the beneficiary's family, including dis	seases that may	y be heredit	ary or place the

Allergies (1)

Substance

A Latex

A No Known Medicatio.. --

Sev.

✓ Reactions

Hives

Cat.

Drua

Stat

Environment Active

Active

4. Review and/or update Social history. a. 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.

beneficiary at risk.

1. 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.

1. 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.

Scales and Assessments	+	~	All Visits: L
100 C 100	РН	Q-2 a	ind PHQ-9



Add allergy

Comments

1

Outpatient

Reverse Allergy Check

Rea.

Alleray

Allergy

Sou.

Reconciliation Status: Incomplete Complete Reconciliation





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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 preventive visit	Z00.00 (ICD-10-CM)		Medical	✓ This Visit

• 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.

 The Healthcare Decision Maker – Medicare. Document the patient's end-of-life planning and the provider's agreement with the patient pertaining to: 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. 	Medicare Annual Wellness Visit Medicare Annual Wellness Visit Form (Auth Author; Contributor(s): Smith LMSW, (Verified)) Megan E Healthcare Decision Maker - Medicare Able to Provide Info., Decision Maker : Yes ST Letter of Guardian - RTF : Please select 'No' in field below as this patient does not have a Letter of Guardianship in their medical record AD/DPOAH Status : Yes Open HDM Peds : 18-150 Smith LMSW, Megan E - 10/3/2023 2:06 PM EDT
 Opioid Risk Tool 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. 	Opioid Risk Tool - Opioid Use Disorder Family History Alcohol Abuse, ORT-O/ Family History Illegal Drug Use, O Family History Prescription Use O Opioid Review + Opioid Review Disorder
Infections Disease Risk Screening (include if completed, not required)	Infectious Disease Risk Screening Infection History Grid Chickenpox : Yes History of Bash Virus in Last Mc
Health Risk Assessment (include if completed, not required)	Health Risk Assessment Hazards in your hous Fall Risk Past Year : Tag Worried About Falling
Functional Assessment	Functional Assessment
Hearing and Vision Screening	Hearing and Vision Screening III Tympanogram Performed Leven Tympanogram Performed Tag



Selected Visit

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Home Safety Screening	Home Safety Screen
Mini-Cog (include if completed, not required)	Mini-Cog
Conley Fall Risk Scale	Conley Fall Risk Scale II History of Falls in Last M Impaired Judgmer Tag Aditation Fall Risk
Instrumental ADL Adult	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.

Abbreviation	Description		a	Show Auto Text Notifica
.healthmain	Welcome to Medicare Reco	mmend	laitons	Show Advanced
Font -	Size 🗸 🖒 🛱 🛛	6.7	▶ B I U A- ≞ ≞ ≣ ⊡	
Q Search Templates/Tokens	kens		Patient: AMBCERNED, HAZEL Encounter FIN: ATI	
Name	▲ Туре	\$	Health Maintenance	
* Discharge	Smart Template			
* Health Maintenance	Smart Template			
* Medications	Smart Template			Save Cance

Objective/Physical Exam Tahoma * 9 X Ê | ΒI <u>U</u> <u>A</u>-= = = **■ ©** General: Well appearing, well nourished, in no distress, non-toxic. Heart: Regular rate and rhythm, no murmurs, rubs, gallops, or clicks Lungs: Clear and equal to auscultation, no crackles, wheezes or rhonchi Abdomen: Soft, non-tender, non-distended, bowel sounds normo-active, no rebound, rigidity or guarding. Life Style: Rich diet discussed increasing fruits and vegetables, Sedentary discussed walking at least 15 minutes daily

Recommendations		+ 0
Pending	Not Due / Historical	
Communication Preference:	Edit	My Role Only Group By Category
Advance Directive Last Action:		Next Due: Today One-time only
BMI Measurement Last Action:		Next Due: Today Every 183 day(s) >

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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.

Create the Dynamic Documentation Note

Workflow.

6. Click OK.

2. Click Select Other Note.

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)
- Select the Welcome to Medicare Visit charge (G0402)

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

3. Search for and select Medicare Wellness Exam.

🕂 Add 🗐 🔳 🖿 New Note X List

> Note Type List Filte AII

'Type:

Title

*Date:

11/15/2023 *Author: Eduphys, 7

5. Change the Type to Annual Wellness Office Visit Note.

Annual Wellness Office Visit Note

Medicare Wellness Exam

4. Change the Note Type List Filter to All.

1. Select More under Create Note at the bottom of the AMB Specialty

0858 EST



Create Note

Consultation

Morez

medicare

OK Cancel

Favorites (0)

Description

Medicare Wellness Ex

Note Templates

Name

Medicare Wellness Exa

Primary Care Office Note

Preventative Health Exam

Preprocedure Office

Well Child Office Note

Long Term Care Note

1



Telephone Visit Note

Video Visit Note

UC Video Visit Not

Ambulatory Visit

New Order

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