

Annual Wellness Visit (AWV) Implementation Checklist

Clinic Name:

Date:

1. ESTABLISH AN AWV BENCHMARK AND TARGET:

Total number of Medicare Part B Patients Attributed to Clinic¹

Enter value

Total number of Medicare AWVs completed in last 12 months

Enter value

Percentage of Medicare AWVs completed in last 12 months

Target percentage of Medicare AWVs completed per year

Enter value

Number of completed AWVs per week to reach target percentage²

2. PLAN TO GENERATE AWV PATIENT LIST:

Are you able to generate a list of Medicare patients without an AWV in the last 11 months?

Yes / No

If no, how will you identify Medicare patients who need an AWV?

3. PLAN FOR SCHEDULING AWVs:

How will you schedule Medicare AWVs?

☐ Phone

☐ In-office

☐ Both

☐ Other _____

Name(s) of staff who will schedule Medicare AWVs:

1.

2.

3.

4.

How much time will you schedule for Medicare AWVs?

minutes

4. PLAN FOR COMPLETING THE HEALTH RISK ASSESSMENT (HRA) FORM:

When will the HRA form be completed by the patient?

☐ Before

☐ At visit

☐ Both

☐ Other _____

If before, how will patient receive HRA form?

☐ Mail

☐ Email

☐ Other _____

5. CREATE A BLUEPRINT FOR THE AWV:

Who will obtain the necessary patient vitals?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

Who will review the list of current providers and suppliers?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

Who will review the patient's medical/family history?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

Who will review the HRA with the patient?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

Who will perform screenings, including cognitive testing?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

(As needed) Who will review potential risk factors for

depression, functional ability and level of safety?

☐ MA

☐ RN/LPN

☐ Provider

☐ Other _____

How will you capture the HRA data in your EHR?

☐ Scan HRA into EHR

☐ Enter data into EHR template

How will the personalized Preventive Plan Services (PPS) document(s) be generated?

☐ Filled-out by staff

☐ Printed from EHR template

When will PPS be given to the patient?

☐ In the exam room

☐ At check-out

☐ Other _____

6. CODING / BILLING THE AWV:

Have you successfully billed for a Medicare Initial or Subsequent AWV in the past?

Yes / No

If no, what tools/training will you need to do so?

Notes:

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- ¹ Medicare patients are attributed to clinics using the two-step attribution process developed by Medicare for the Value-Based Payment Modifier Program; available at <https://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payments/PhysicianFeedbackProgram/Downloads/Attribution-Fact-Sheet.pdf>
- ² Assuming 50 working weeks per year