

Table of Contents

Documenting a Medicare Wellness Visit	2
Accessing and Using the Annual Wellness Visit Activity Navigator	2
New Additions	3
Using the SmartSets - Health Maintenance	3
Manually Creating Progress Notes and Patient Instructions	4
Progress Note.....	4
Patient Instructions	5
Care Gaps and Health Maintenance	6

Documenting a Medicare Wellness Visit

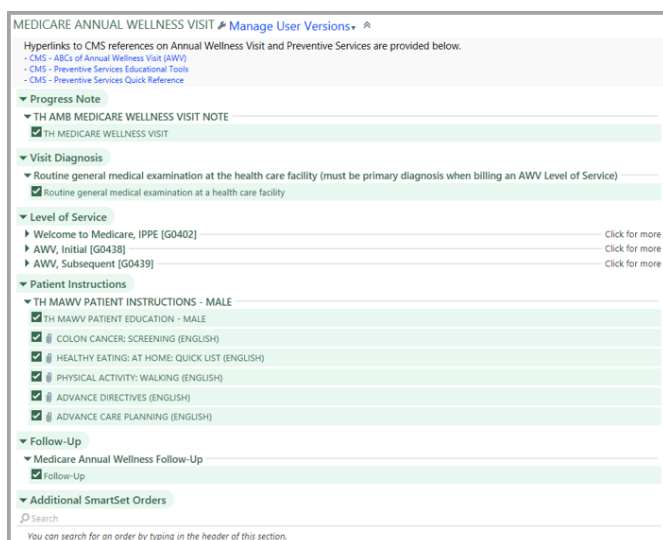
We have built out specific tools for documenting a Medicare Wellness Visit to improve the efficiency of documenting these encounters. These tools include an Annual Wellness Visit Navigator, A Health Maintenance SmartSet, and a Medicare Wellness SmartText to pull it all together.

This applies to the following recommended **Visit Types**:

- Welcome to Medicare
- Medicare Annual Wellness
- Medicare Annual Wellness VIRT
 - Medicare Annual Wellness VIRT is a Virtual Visit Type

Accessing and Using the Annual Wellness Visit Activity Navigator

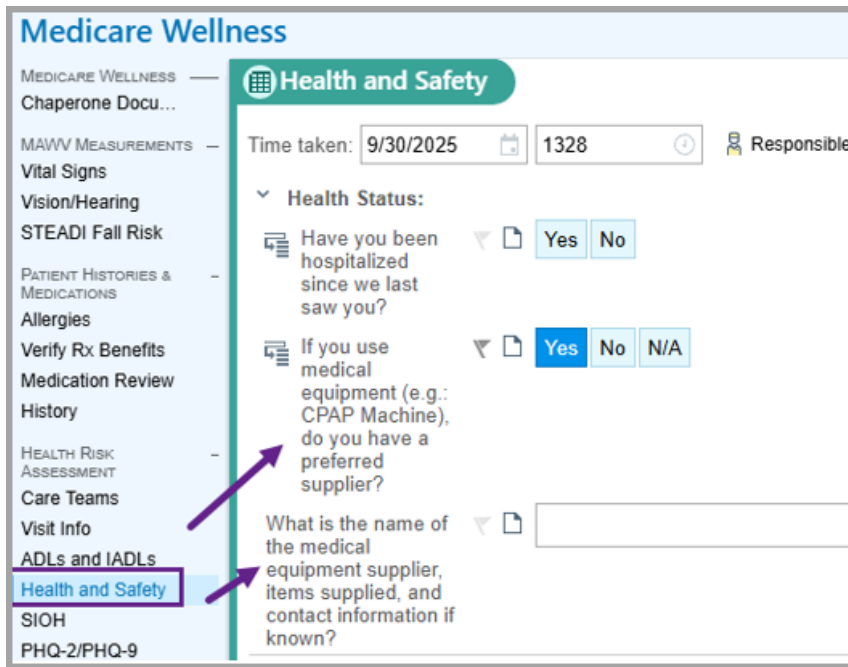
1. With an Annual Wellness Visit type, the patients encounter will open to the Medicare Wellness Activity Navigator.
2. Within the Navigator is the patient’s Visit Information, History, Risk Assessments, Notes, Charging and SmartSets.
 - a. Visit Information - Reason for Visit (3) reasons to choose from
 - b. Welcome to Medicare
 - c. Medicare Annual Wellness Visit-Initial
 - d. Medicare Annual Wellness Visit-Subsequent
3. All of these will trigger the new AWW SmartSet: Medicare Annual Wellness Visit.
4. The AWW SmartSet Contains:
 - a. Progress Note template
 - b. Patient Instructions
 - c. Level of Service Charges
 - d. Visit Diagnosis



New Additions

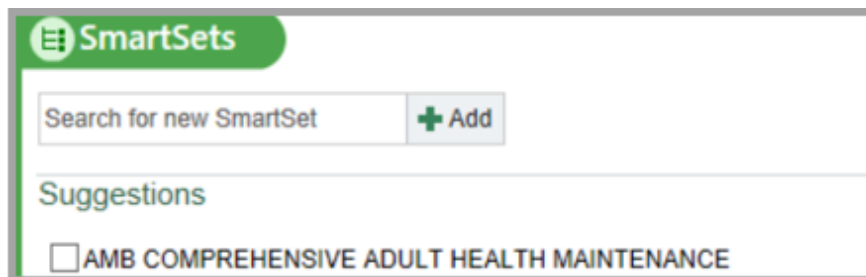
As of April 2025, there are several updates to the Medicare Wellness activity.

- The ADL screening has been updated to match the one in the All-Screening activity.
- Visual and Hearing screening has been combined into one and is included in the Medicare Wellness activity. This will allow providers to document on them both from one activity.
- DME questions are embedded in the Health and Safety section.



Using the SmartSets - Health Maintenance

1. Use the **Amb Comprehensive Adult Health Maintenance SmartSet** to assist in easily placing orders for pertinent health maintenance topics that are due for the patient.
2. Select the **AMB COMPREHENSIVE ADULT HEALTH MAINTENANCE SmartSet**.
 - a. This SmartSet will be suggested if the patient is due for any health maintenance topics identified in the SmartSet



3. Select the orders that are due for the patient's Health Maintenance.

AMB COMPREHENSIVE ADULT HEALTH MAINTENANCE ⌵

Select both the order and associated diagnosis for each test/procedure below.

- ▼ **Preventative Screening**
 - ▶ Mammogram
 - ▶ Hep C
- ▼ **Immunizations**
 - ▶ Influenza vaccine
 - ▶ Pneumococcal Vaccine (Adult)
 - ▶ Shingles Vaccine
- ▼ **Lab monitoring**
 - ▶ Urine Testing
- ▼ **Additional SmartSet Orders**

🔍 Search

You can search for an order by typing in the header of this section.

Manually Creating Progress Notes and Patient Instructions

If you choose not to use the SmartSet, you could manually pull in the Progress Note template and add Patient Instructions.

Progress Note

1. In the SmartText Lookup, search for **THMG Medicare Wellness Visit**.
2. There is also a SmartText for **DAX: THMG Medicare Wellness Visit DAX**.

My Note Tag Share w/ Patient

★
B
↺
abc
↻
?
+ Insert SmartText
↵
↶
↷
↺
↻
📄

3. This SmartText will pull in relevant information that was documented during the visit. For example, Care Team members, Risk Assessments, Health Maintenance, and History.
4. Place your cursor at the top of your note and click **F2** to move through the note and resolve outstanding SmartLists, or Wildcards *** .

Two Apphf is a 71 y.o. female who presents for an Annual Medicare Visit (MWV visit types:25179)

HPI

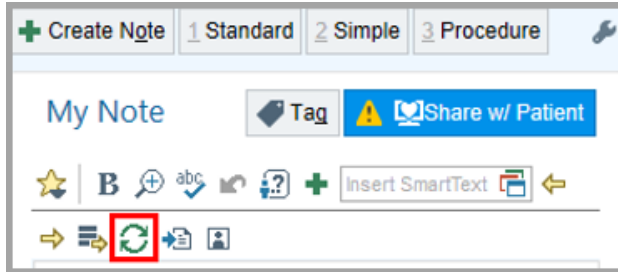
Current Providers List:
 Patient Care Team:
 Steven Bolton, MD as PCP - General (Family Medicine)
 Steven Bolton, MD as PCP - SE MI MSSP T1 IHA (Family Medicine)


Risk Assessments

- There is no height or weight on file to calculate BMI. The BMI (BMI plan (MU NQF measure 421):19504)
- Fall Risk: Have you fallen in the past year? yes. Are you worried about falling? no.
- Depression Risk Score: 15

Depression Severity: None-minimal
Proposed Treatment Actions: None

- Refresh the note if you add to the note after you launched the SmartText.

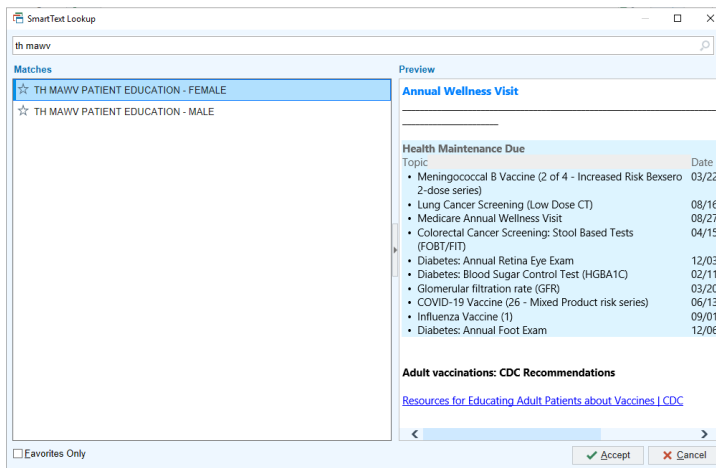




NOTE: It is important that all documentation be completed before launching this SmartText. If any documentation is completed after the Note is started, refresh to update the Note.

Patient Instructions

- Navigate to the Patient Instructions section to search and add Clinical References manually.



You Can Also....

- Schedule and perform an annual wellness visit with multiple providers.
- The RN can complete and bill for an AWW which is billable only on the HB account, no professional charges would be attached. Once the RN completes their portion of the visit, the provider will complete a visit for chronic care management and bill an E&M on both the HB and PB sides.
- To allow claims to split appropriately, the nurse selects the charges in LOS/Additional E&M section, charge router evaluates the service provider and if it is a nurse the router will delete the PB Charge and leave the HB charge for the AWW.

Care Gaps and Health Maintenance

Medicare Annual Wellness Visit

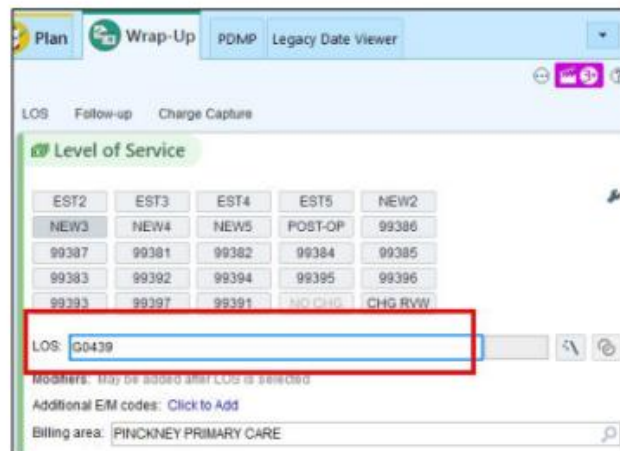
i

CMS recommends annual wellness checks to develop or update a personalized prevention plan and perform a health risk assessment.

For more information about the Medicare Annual Wellness Visit Documentation, refer to the [Outpatient Clinical User Learning Home](#) dashboard within TogetherCare.

To complete this topic, the provider will need to complete the following steps:

1. During the **Medicare Annual Visit**, navigate to the **Wrap Up** tab
2. Under **Level of Service**, enter one of the following codes:
 - PR VISIT ANNUAL WELL W/ PPPS INITIAL VISIT [G0438]
 - PR VISIT ANNUAL WELL W/ PPPS SUBSEQUENT VISIT [G0439]
 - PR EXAMINATION INITIAL PREVENTIVE PHYSICAL NEW VISIT DURING 1ST 12 MONTHS OF MEDICARE ENROLLMENT [G0402]



3. Sign the visit.

The encounter is closed, and the charge is dropped. The topic is completed for the year.

!

If an audit is held and all required elements are not completed, the visit code may need to be updated and will no longer satisfy the HMT.