

# Report on Medicare Compliance Volume 29, Number 40. November 09, 2020

## Snapshot of the Welcome to Medicare Visit and Annual Wellness Visit

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Here's a brief summary of the requirements for the visits, which are vulnerable to claims denial.<sup>[1]</sup> This was created by Betsy Nicoletti, a consultant in Northampton, Massachusetts. Contact Nicoletti at [betsy@betsynicoletti.com](mailto:betsy@betsynicoletti.com).

### **Preventive Medicine Services: Medicare**

#### **Welcome to Medicare Visit**

**G0402** This is a one-time benefit available to Medicare beneficiaries within the first 12 months of their enrollment in Medicare:

- Medical, family and social history.
- Screening for depression using accepted instrument.
- Screening EKG (optional).
- Five physical examination components: height, weight, calculation of BMI, blood pressure and screening for visual acuity.
- Review of the patient's ability and level of safety.
- With patient permission, end-of-life planning.
- Counseling, education and referral based on the above.
- Counseling, education and referral for covered Medicare preventive services with a written plan for these given to the patient.

#### **Annual Wellness Visits**

**G0438** Initial wellness visit; includes a personalized prevention plan of service (PPS):

- Taking or updating individual's medical and family history.
  - Establishing a list of current providers and suppliers of medical care.
  - Height, weight, BMI calculation (or waist circumference), blood pressure and "other routine measurements as deemed appropriate."
  - Review (and administration if needed) of a health risk assessment.
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- Review potential for depression based on use of appropriate screening instrument.
- Review of individual's functional ability and level of safety.
- Detection of cognitive assessment.
- Establishment of a written screening schedule, such as a checklist, for the next 5-10 years based on recommendations of the US Preventive Task Force and Advisory Committee on Immunization Practices, and the individual's health status, screening history and age-appropriate covered Medicare services.
- Development of a list of risk factors and conditions for which primary, secondary or tertiary interventions are recommended or are underway, including mental health conditions or risk factors or conditions identified through a previously performed Welcome to Medicare Visit (or this visit) and a list of treatment options and their associated risks and benefits.
- Furnishing of personalized health advice and referral, as appropriate, to health education or preventive counseling programs aimed at reducing identified risk and improving self management, including weight loss, smoking cessation, fall prevention and nutrition.

**G0439** Subsequent annual wellness visit:

- Requires updates to all components done at the initial annual wellness visit

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