How to streamline workflow for a Medicare annual wellness visit

FEB 22, 2022

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Although Medicare fully pays for an annual wellness visit (AWV), fewer than 20% of those who are eligible are getting the primary care exam that focuses on preventive care.

These annual visits are an important paradigm shift in primary care because they give physicians and their teams a chance to discuss—and get paid for discussing—the value of preventive screenings for diseases such as colon and breast cancer. The care team also can screen for depression and dementia, talk about advanced care planning, and focus on safety issues and social needs.

During an episode of the AMA STEPS Forward™ podcast, Philip Bain, MD, an internist at Bozeman Health Belgrade Clinic in Montana, discussed strategies physicians can use to streamline the workflow in their practices to ensure a thorough and efficient AWV. Dr. Bain’s big takeaway message during the podcast: Physicians and advanced care practitioners do not—and should not—do most of the work for AWV visits.

“This needs to be a team-based approach,” said Dr. Bain, who is also the physician assistant director for primary care at Bozeman Health. “You need to engage the patient to fill out the health risk assessment before the visit. You need to leverage the care team to confirm and record the answers.”

Dr. Bain is an author of the AMA STEPS Forward toolkit, “Medicare Annual Wellness Visit: Streamline Workflow to Perform a Thorough AWV.” The online tool helps physicians understand the AWV, communicate with patients to set expectations about the visit and map out an AWV workflow.

The AMA STEPS Forward open-access toolkits offer innovative strategies that allow physicians and their staff to thrive in the new health care environment. These courses can help you prevent physician burnout, create the organizational foundation for joy in medicine and improve practice efficiency.

6 steps to conduct AWVs


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During the podcast, Dr. Bain discussed how his office ensures patients eligible for an AWV are aware of their eligibility and walked through how his practice conducts the visits.

**Remind patients that they are eligible and encourage them to schedule their visit.** This means reviewing the patient panel on a regular basis to see which patients are due for an AWV. For those who are eligible, the team then reaches out to them.

**Ask patients to fill out a health-risk assessment ahead of the visit.** When patients call to schedule their exam, the front desk staff lets them know they will receive the questionnaire in the mail and should fill it out ahead of time.

**Send patients for pre-visit labs.** Clinic staff members contact patients by phone or, preferably, through MyChart to have them come in and complete labs before their exam. The staff also uses this opportunity to remind patients to complete the health risk assessment.

**Encourage patients to come in 15 minutes before their scheduled exam time.** During check-in, patients are asked if they completed the health risk assessment. If not, they are given a copy to fill out. If the patient hasn’t completed the assessment and doesn’t arrive in time to fill one out before the visit, they are asked to reschedule the AWV part of their exam.

**Clearly explain what Medicare covers.** While insurance fully covers the AWV part of a visit, the chronic disease management portion may require the patient to make a copay. Dr. Bain’s office has patients sign a waiver that explains this and asks whether they want to make that day’s visit AWV-only, chronic disease management-only or a combination.

**Engage those doing the rooming.** Have the person bringing the patient into the exam room confirm answers on the health risk assessment and record them in a smart list before the physician even enters, allowing the doctor to focus on the pertinent questions.

The CME toolkit, “Medicare Annual Wellness Visit,” is enduring material and designated by the AMA for a maximum of 0.5 *AMA PRA Category Credit.* It is part of the AMA Ed Hub™, an online platform with top-quality CME and education that supports the professional development needs of physicians and other health professionals. With topics relevant to you, it also offers an easy, streamlined way to find, take, track and report educational activities.