

Medical record number

Medicare First Annual Wellness Visit

Patient's name: _____ **D.O.B.:** ____/____/____

Part B eligibility date: ____/____/____ **Date of exam:** ____/____/____ **Allergies:** _____

Medical and social history

Past personal illnesses, injuries, operations	Date	Hospitalized?

Tobacco use: _____
Alcohol use: _____
Drug use: _____
Medications, supplements, vitamins: _____

Current list of patient's providers and suppliers

Name	Specialty	Reason

Height: _____
Weight: _____
BMI: _____
BP: _____
Visual acuity: L _____ R _____
 _____:

Family history (check those that apply)

<input type="checkbox"/> Alcoholism	<input type="checkbox"/> Cancer	<input type="checkbox"/> High Cholesterol	<input type="checkbox"/> Seizures
<input type="checkbox"/> Anemia, Sickle Cell	<input type="checkbox"/> Diabetes	<input type="checkbox"/> Hypertension	<input type="checkbox"/> Stroke
<input type="checkbox"/> Arthritis	<input type="checkbox"/> Heart Disease	<input type="checkbox"/> Obesity	<input type="checkbox"/> Thyroid Disease
<input type="checkbox"/> Bleeding Disorders	<input type="checkbox"/> Liver Disease	<input type="checkbox"/> Kidney Disease	<input type="checkbox"/> Tuberculosis

Notes: _____

Is the patient on a special diet? Why? _____

Detection of cognitive impairment: _____

Depression screen (ask the following questions, check the response)

- Over the last two weeks, have you felt down, depressed or hopeless? Yes No
- Over the last two weeks, have you felt little interest or pleasure in doing things? Yes No

Hearing loss screen

- Do you have trouble hearing the television or radio when others do not? Yes No
- Do you have to strain or struggle to hear/understand conversations? Yes No

Function screen

1. Do you need help with preparing meals, transportation, shopping, taking your medicine, managing your finances, or other activities of daily living? Yes No
2. Do you live alone? Yes No

Home safety screen

1. Does your home have throw rugs, poor lighting, or a slippery bathtub/shower? Yes No
2. Does your home LACK grab bars in bathrooms, handrails on stairs and steps? Yes No
3. Does your home LACK functioning smoke alarms? Yes No

Risk for falls screen

1. Was the patient unsteady or take longer than 30 seconds during the timed “get up and go” test? Yes No

<u>ACTION ITEMS:</u> Information in the patient’s history and checking any yes response to the above screening questions should trigger further evaluation(s).		
Evaluation/referral based on screening	Scheduled appointment (dates, physician, etc.)?	Notes

Advanced care planning

1. Patient Consent: “I consent to discuss end-of-life issues with my healthcare provider.”

Patient/Guardian Signature
Date

2. Patient already has executed an Advance Directive. Yes No
3. If no, patient was given an opportunity to execute an Advance Directive today? Yes No
4. Physician Statement: “This individual has the ability to prepare an Advance Directive.”
Yes No
5. Physician has completed a physician order for life-sustaining treatment, or similar document of reflecting the patient’s wishes for an advanced care plan. Yes No
6. Physician is willing to follow the patient’s wishes. Yes No

Notes:

Preventive screen (frequency)	Coverage	Previously tested (If yes, when?)	Scheduled for screenings (5 to 10 years)
Bone Mass Measurements (every 24 months)	Medicare patients at risk for developing Osteoporosis		
Cardiovascular Screening Blood Tests (every 5 years) – Lipid panel – Cholesterol – Lipoprotein – Triglycerides	All asymptomatic Medicare patients (12-hour fast is required)		
Colorectal Cancer Screening – Flexible sigmoidoscopy (4 years, or once every 10 years after a screening colonoscopy) – Screening colonoscopy (every 24 months at high risk; every 10 years not at high risk) – Fecal occult blood test (annually) – Barium enema (every 24 months at high risk; every 4 years not at high risk)	– Medicare patients age 50 and up – Screening colonoscopy: Those at high risk; no minimum age – No minimum age for having a barium enema as an alternative to a high risk screening colonoscopy if the patient is at high risk		
Diabetes Screening Tests (2 screening tests per year for patient diagnosed with pre-diabetes; 1 screening per year if previously tested, but not diagnosed with pre-diabetes or if never tested)	Medicare patients with certain risk factors for diabetes or diagnosed with pre-diabetes (patients previously diagnosed with diabetes aren't eligible for benefit)		
Diabetes Self-Management Training (DSMT) and Medical Nutrition Therapy (Up to 10 hours of initial training within a continuous 12-month period; subsequent years up to 2 hours of follow-up training each year after initial year)	Medicare patients at risk for complications from diabetes, recently diagnosed with diabetes or previously diagnosed with diabetes (must certify DSMT need)		
Glaucoma Screening (annually for patient ins one of the high risk groups)	Patients with diabetes mellitus, family history of glaucoma, African-Americans age 50 and over, or Hispanic-Americans age 65 and up		
Prostate Cancer Screening (annually) – Digital rectal exam – Prostate specific antigen test	All male patients 50 or older		
Screening Pap Tests and Pelvic Examination (annually if high-risk, or childbearing age with abnormal Pap test within past 3 years; every 24 months for all other women)	All female Medicare patients		
Screening Mammography (annually)	All female patients 40 or older		
Vaccines – Pneumococcal (once in a lifetime) – Seasonal Influenza (once per flu season in the fall or winter) – Hepatitis B (scheduled dosages required)	All Medicare patients – May provide additional pneumococcal vaccinations based on risk and provided that at least 5 years have passed since previous dose – Hepatitis B, if medium/high risk		

Provider signature: _____ Date: _____

EXAM FORM: Completing this form is not required for the Wellness Visit, but is voluntary.

Subjective: C/O: _____ **Referred by:** _____
HPI: Well Visit - Last Complete Exam: / / **Current pain:** no yes **Severity of Pain:** 0 1 2 3 4 5 6 7 8 9 10 (Circle)

PFSH: See History Form in front of chart dated: ___/___/___
Social History: No change **Tobacco?** Yes No **ETOH?** Yes No **Drugs?** Yes No _____
Family History: No Change _____
Medical History: No Change _____

ROS: Constitutional ENT Cardiovascular Respiratory GI Musculoskeletal Skin/Breast
 Neuro Psych Endocrine Hematologic GU Allergic/Immunologic Eyes/Head

√ = normal X = abnormal other than stated in HPI - explanation

Objective

√ = examined & normal X = abnormal w/ explanation

	Skin		
	Lymph nodes		
	Neck		
	Eyes		
	ENT		
	C/V		
	Abd / Gastro		
	Respiratory		
	Chest / Breasts		
	Back		
	Genitalia		
	Neurologic		
	Psych		
	Extremities / Hips		
	Extremities / upper		

IMP/Dx/Plan:

ORDERS: Oral Meds: _____ Injection _____
 Rapid Strep _____ UA _____ 02 Sat _____ EKG _____ X-Ray of _____ - Views: _____
 Lab: _____ Other: _____ done by: _____

RTO _____ Days / Weeks / Months / Years / if worsens or no improvement / after tests / PRN Educational Material Given: Yes No
 Provider names: _____ Time spent with patient _____ estimated counseling time _____ consult

Provider signature: _____ Date: _____