

Wellness Care—Forms Review

Review the forms and screening tools you're currently using – You may find that your practice already has forms and processes that meet most of the requirements of the annual wellness visit (AWV). Family/ medical history and current treatment information is likely already being captured in your system. Some practices find they need to adopt or update health risk assessment forms, screening tools, and preventive services planning tools. Practices may want to plan for incorporating data collection, decision support and patient access into their electronic health record.

Review the following

- [Medical/Family History – Review Checklist](#). It is likely that you're already capturing everything required for a complete medical/family history. You can use this checklist for review.
- [Health Risk Assessment \(HRA\) – Review Checklist](#). You may already have a health risk assessment form. You can use this checklist for review. Sample health risk assessment questions and forms can also be found in this toolkit, see:
- [Sample HRA Questions](#)
- [HRA 2 pages](#) (sample form)
- [HRA Large Font](#) (sample form)

Screening, preventive care and follow up forms. Sample forms that can be used in the AWV are included in this toolkit, see:

- [Katz and Lawton Activities of Daily Living Forms](#) (supplement)
- [Screening Mild Cognitive Impairment](#)
- [Medicare Covered Preventive Screenings and Services](#)
- **AWV Results Follow Up**
- **HRA Responses Referrals**
- **How to Order Tools Resources**
- [AWV Action Plan](#)

This material was prepared by HealthInsight, the Medicare Quality Innovation Network -Quality Improvement Organization for Nevada, New Mexico, Oregon and Utah, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy. # 11SOW-CORP-17-38