

## How Can Our Practice Add or Expand Wellness Care?

- 1. Get oriented** – Even if you’re already providing annual wellness visits (AWV) or similar services, especially if they are for other payers (beyond traditional Medicare), it might be worthwhile to review AWV requirements under Medicare fee-for-service – as other payers may have expectations that differ from Medicare fee-for-service requirements. This would include review of the Initial Preventive Physical Exam (the “Welcome to Medicare” visit – a distinct service), the initial AWV, and subsequent AWV. Practices will also want to be familiar with rules for other services that can be provided on the same day as the AWV.
- 2. 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 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 patient information capture, decision support, and patient access into their electronic health record.
- 3. Map out the AWV delivery care team roles** – Practices have a great deal of discretion in how they choose to deliver AWV services depending on the judgement and preference of care providers and resources available on the care team. Based on resources available and review of the business case, the practice may make plans for expanding staffing to include additional medical professionals or changing the roles of current staff. Practices will want to establish staff competencies and training for any new roles or functions being introduced. This will typically include a focus on preventive services planning and patient counseling to promote engagement and follow-through, as well as documentation requirements.
- 4. Review the practice business case** – It may be useful for practices to analyze the business case, including staffing costs and expected revenues, in a larger context. Practices may find that additional staff resources brought on board to help provide AWV can also generate revenue through Chronic Care Management services, Transitional Care Management, and other preventive and screening services. These trained staff are then available to the practice to support other initiatives focused on increasing quality or containing costs.
- 5. Prepare for patient communications** – Most patients have no experience with AWV. Many will not know what is included in an AWV and may expect a physical examination. Others will not appreciate the value of this type of preventive approach and will decline the service. There is no co-pay for the AWV service. However, if additional care is provided, a co-pay may be required. This is not an uncommon situation – expectations can be managed through a proactive approach and

clear communications. Practices can establish AWV patient communications strategies, forms and letters, and staff scripting to head-off misunderstandings and patient frustrations, and imbed them in consistent wellness visit processes.

**6. Develop a comprehensive AWV care process** – Such a process would include:

- Marketing AWV services to patients – either through return visits or active outreach.
- Scheduling using current visit structure and/or redesigned systems
- Pre-visit planning – orienting patients to the AVW, health risk assessment data collection, what to bring to the visit, and preparation for screening tests (e.g., fasting).
- AWV intake – check to ensure forms are complete, required information available.
- AWV encounter
  - Review of health risk assessment
  - Screens
  - Developing a written screening schedule
  - Plan, schedule, refer for additional care
  - Patient counseling, health advice, and community resource referral
- Documentation and billing

Practices may find it useful to directly involve the entire team in the design of this care process, as the introduction or expansion of this service has the potential to impact multiple workflows. Team members often have useful insights into how new activities can be incorporated into existing processes and how to effectively manage physical resources (like exam rooms).

**7. Pilot the process, review and refine** – Develop a plan to check-in early to ensure processes are working as expected across the practice, identify any areas that might benefit from improvement efforts, and review over time to ensure that wellness care are supporting overall practice goals.

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