

To aid communication between patients and staff when patients call to schedule any type of Medicare wellness visit, this resource for schedulers includes definitions, tips, and sample scripts.

Medicare wellness visits			Routine office visit/exam
Welcome to Medicare visit (also known as Initial Preventive Physical Examination, or IPPE)	Annual wellness visit (AWV)	Preventive physical exam	Evaluation and management visit
Medicare pays 100%.	Medicare pays 100%.	Not covered by traditional Medicare but may be covered by Medicare Advantage plan; provided at patient's request.	Subject to the patient's deductible/coinsurance/co-pay.
Covered only once in a lifetime; must be provided within the first 12 months of patient's enrollment in Medicare.	Initial AWV covered 12 months after enrollment in Medicare or 12 months after the Welcome to Medicare visit. Subsequent AWVs may be provided annually.	A comprehensive, not focused, "head-to-toe" physical exam.	A problem-oriented visit; may be described by patient or physician as follow-up appointment or recheck.
A focused physical exam, review of the patient's health, and development of a plan to keep the patient healthy. Not a comprehensive, "head-to-toe" physical.	A focused physical exam, review of the patient's health, and development of a plan to keep the patient healthy. Not a comprehensive, "head-to-toe" physical.		

**TIPS**

The Welcome to Medicare visit and annual wellness visit are to review the patient's wellness and develop a plan to keep the patient healthy. They include a focused physical exam – not a comprehensive, "head-to-toe" physical exam.

If the patient has one or two additional medical problems, the physician may choose to treat these at the same time as the wellness visit. This additional service will be billed separately and, therefore, is subject to the Medicare deductible/coinsurance/co-pay.

If the patient has multiple medical conditions that need treatment, we recommend scheduling a regular office visit and explaining that the wellness visit can be scheduled when he or she is feeling better.

If the patient requests a comprehensive physical exam in addition to a wellness visit, two separate appointments may be needed. Schedule the wellness visit and recommend that the patient schedule the comprehensive physical exam (which is not covered by Medicare) after the wellness visit if it still seems necessary.

### SAMPLE SCRIPTS

1

**Patient:** "I've heard Medicare is covering physicals." Or "I want to schedule a complete physical exam."

**Scheduler:** "Are you calling to schedule the new annual wellness visit benefit that is covered by Medicare or are you wanting the Welcome to Medicare visit, which is available to anyone in their first year of Medicare coverage?"

**Note:** If the patient wants the Welcome to Medicare visit, jump to Script 2.

**Patient:** "I would like to schedule the annual wellness visit."

**Scheduler:** "The annual wellness visit is an overview of your health and focuses on developing a plan to keep you healthy. Just so you know, it does not include or replace a complete, 'head-to-toe' physical exam."

**Patient:** "I understand. I would like to schedule the annual wellness visit. I only have a few minor concerns."

**Scheduler:** "I'll be happy to schedule your annual wellness visit. Please understand if the doctor addresses your additional medical concerns, that service will be subject to your Medicare deductible or coinsurance."

**Note:** Schedule the annual wellness visit appointment and recommend the patient read his or her Medicare information about what to expect during the annual wellness visit.

2

**Patient:** "I want to schedule my Welcome to Medicare visit."

**Scheduler:** "When did your Medicare start?"

**Note:** If patient enrolled in Medicare more than 12 months ago, skip the following question.

**Scheduler:** "Have you previously had a Welcome to Medicare visit?"

**Note:** If no, schedule the appointment and recommend the patient read his or her Medicare information about what to expect during the Welcome to Medicare visit.

If yes, or if more than 12 months has passed since the Welcome to Medicare visit, continue. If less than 12 months has passed, instruct the patient to call back to schedule an annual wellness visit when appropriate.

**Scheduler:** "You are not eligible for the Welcome to Medicare visit [give reason, reference the patient's answer to above questions], however, we can schedule you for an annual wellness visit. The annual wellness visit is an overview of your health and focuses on developing a plan to keep you healthy. Just so you know, it does not include or replace a complete, 'head-to-toe' physical exam."

**Patient:** "I understand. I would like to schedule the annual wellness visit. I only have a few minor concerns."

**Scheduler:** "I'll be happy to schedule your annual wellness visit. Please understand if the doctor addresses your additional medical concerns, that service will be subject to your Medicare deductible or coinsurance."

**Note:** Schedule the annual wellness visit appointment and recommend the patient read his or her Medicare information about what to expect during the annual wellness visit.