

Medicare Annual Wellness Visit (AWV) Scripting Guide

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Basic Concepts and Reminders for Clinic Staff

It is common for patients to have questions about the Annual Wellness Visit (AWV), especially after they have received patient outreach materials inviting them to schedule. It is important that the care team are prepared to answer patient questions about AWVs and respond appropriately. Below are some facts about AWVs that the care team should know before talking to patients about them. You will also find several script examples that walk-through a patient's discussion with a member of the care team about their upcoming AWV.

- Medicare AWV is NOT an annual physical. The AWV is an appointment dedicated to maintaining the patient's wellness by developing a plan to address any care needs identified. Some refer to it as the "sit down and talk" visit. This visit allows the care team to take the time to focus on keeping the patient healthy by doing the following:
 - Talking about the patient's personal and family medical history
 - Talking about feelings of stress, anxiety, or depression
 - Asking questions about lifestyle, daily routine, and memory
 - Creating a schedule to make sure the patient receives the preventive care they are entitled to
 - Giving a simple hearing and vision test
 - Checking weight, height, blood pressure, and body mass index
 - Creating a personalized prevention plan to address health concerns
 - Talking about who should make decisions about the patient's healthcare if they become unable to do so for themselves (optional)
- This visit is free to the patient:
 - Added health care services may require out of pocket costs
 - Dual visits - when the patient sees the clinician for an E&M and has an AWV on the same DOS, result in normal office visit charges/copays
 - Patients will receive an Explanation of Benefits (EOB) showing the charges to Medicare for the AWV; however, it's important to note that Medicare is expecting these charges and has asked us to provide the AWVs as a way to make sure we provide the patient with the best care possible
- How the patient can prepare for their AWV:
 - Complete the Health Risk Assessment (HRA) form provided ahead of time- This is a questionnaire that allows the care team to collect the necessary information to create a personalized prevention plan
 - Bring a list of all medications, vitamins, and supplements
 - Bring the names of all health care clinicians and a list of any new problems identified since the patient's last visit
 - A medical power of attorney or living will if they have one
- How the AWV benefits patients:
 - Can help lower their health care costs in the long run
 - Learn how to make small changes in their lifestyle to keep them healthy
 - Detect diseases early, before they become a problem
 - Review medical conditions and current list of medications, vitamins, and supplements

- Review preventive care they are entitled to, and see if they are up to date on their vaccines

IPPE vs IAWV vs AWV

IPPE

- “Welcome to Medicare” Visit
- Includes a physical component
- Based on patient’s risk factors will potentially include preventative procedures such as an EKG and Labs
- This is the only Preventative Physical that Medicare covers
- This visit sets the stage and helps patients see the benefit of prevention planning
- Patients are only eligible for this during the first 12 months of being on Medicare – if they do not have this done within the first 12 months, they move directly into the regular AWVs

IAWV

- Completed 365 + 1 days after the patient’s IPPE or at any time if the patient did not have an IPPE within the first 12 months of being on Medicare
- Does not include a physical component
- Does not include medication refills or addressing of acute or chronic conditions
- This is a Prevention Planning Visit
 - Things included:
 - Update and review HRA
 - Update medical and family history
 - Vital signs, height/weight/BMI
 - Update Care Team
 - RX Reconciliation
 - DX reconciliation
 - Advance Care Planning
 - Preventative Screenings
 - Fall
 - Dementia
 - Depression
 - Tobacco/Substance Abuse
 - Cancer
 - Chronic condition
 - Care Plan for any positive screenings

Subsequent AWV

- AWV that will occur every year thereafter (must be 365 + 1 days from last AWV)
- Patient must complete new HRA every year
- Update and review all components from IAWV
- Follow up on past care plans and make schedule for chronic condition management and preventative care screenings

Reception Calls Patient to Schedule

Example 1:

Calling a patient to schedule an IPPE

(AFTER GREETING THE PATIENT BY NAME)

This is (YOUR NAME) from (CLINIC NAME). We were looking through our records and noticed you haven't had your Welcome to Medicare visit yet. This visit is fully covered by Medicare and is no charge to you. (PROVIDER NAME) feels this is a very important appointment and asked me to see when you would be available.

Do you have time right now to schedule an appointment or is there a better time for us to call back?

(ONCE THE PATIENT CHOOSES A DATE AND TIME FOR THE APPOINTMENT)

I'm super excited you are taking advantage of this benefit. This is actually the only physical that Medicare covers. This visit will help the provider build a great prevention plan for you during the visit. Although there is a physical component, the intent of this visit is to focus on Health Maintenance and Prevention. To help your prevention plan be accurate and specific to you, we will need some information regarding your physical health, emotional well-being, social support, and your economic needs. This will take about 20 minutes. I can send the questionnaire to you by mail or have a nurse complete it over the phone with you. It is important for this information to be filled out prior to your visit. At your appointment [Provider Name] will use your answers to build a prevention plan that's right for you.

If you have something else to discuss during your appointment such as a medication refill, a sore knee, or any need requiring the provider to perform an assessment, we recommend making a separate appointment to address those concerns since those services are not part of a Welcome to Medicare Visit.

Again, this is the only physical Medicare covers. After this in the coming years you will have an annual wellness visit benefit that is fully covered but its only focus is prevention planning. Thanks for taking the time to help us be part of your health. We look forward to seeing you on (DATE OF APPOINTMENT TIME). Have a great day. Bye.

Example 2:

Calling a patient to schedule an IAWV or subsequent AWW

(AFTER GREETING THE PATIENT BY NAME)

This is (YOUR NAME) from (CLINIC NAME). We were looking through our records and noticed you haven't had your Annual Wellness visit yet. This visit is fully covered by Medicare and is no charge to you. (PROVIDER NAME) feels this is a very important appointment and asked me to see when you would be available.



Do you have time right now to schedule an appointment or is there a better time for us to call back?

(ONCE THE PATIENT CHOOSES A DATE AND TIME FOR THE APPOINTMENT)

Now, I just want to remind you, the purpose of an annual wellness visit is to create a prevention plan. To help your prevention plan be accurate and specific to you we will need some information regarding your physical health, emotional well-being, social support, and your economic needs. This will take about 20 minutes. I can send the questionnaire to you by mail or have a nurse complete it over the phone with you. It is important for this information to be filled out prior to your visit. At your appointment [Provider Name] will use your answers to build a prevention plan that's right for you.

Please be aware, this prevention planning visit does not include a physical. Medicare does not cover an annual physical. If you have something else to discuss such as a medication refill, a sore knee, or any need requiring the provider to perform an assessment, we recommend making a separate appointment to address those concerns since those services are not part of an annual wellness visit. Thanks for taking the time to help us be part of your health. We look forward to seeing you on (DATE OF APPOINTMENT TIME). Have a great day. Bye.

Example 3:

Calling a patient to schedule – alternative option

(AFTER GREETING THE PATIENT BY NAME)

This is (YOUR NAME) from (CLINIC NAME). (PROVIDER NAME) would like to invite you to complete your annual Medicare Wellness Visit. During your Medicare Wellness Visit, you and your health care team will review your medical history, evaluate current health conditions, medications and risk factors, and perform screenings that will help us give you personalized health advice. We will discuss short-and-long-term steps to catch potentially serious health issues early, improve your health and stay well so you can continue to do things that you love.

When is a good time for you to come in?

Please bring a list of all medications you are taking, including over the counter medications, as well as your immunization records and a list of providers, including specialists, that you are seeing to your annual Medicare Wellness Visit.

Medicare pays 100% of the cost for this exam with no out-of-pocket expense to you unless acute medical conditions are addressed. If we need to address other medical concerns, please be advised that you may have a deductible or a coinsurance. Remember, this is your “sit down and talk about your health” visit. “

Example 4:

Converting routine follow-up visits to Medicare Annual Wellness



Hi Mr./Mrs. _____, I see you have a follow-up appointment scheduled with Dr. _____ on date_____. Your Primary Care provider _____noticed that you are due for a Medicare Annual Wellness Visit and wanted me to share that he/she would like to see you for your yearly wellness visit. This is a great opportunity for you and your provider to make a plan on how to stay health and well.

During the visit your healthcare team will talk with you about your medical history, your current health, and your risk for certain illness and injuries. Before you leave you will be given a personalized prevention plan that you and your provider think will help you stay healthy. There is no charge for the Wellness Visit. If you do have health issues that need to be addressed at the same time, you may be responsible for coinsurance and a Part B deductible would apply. What is a good day and time for you?



Patient Calls Clinic to Schedule

Example 1: Patient calls to reschedule or schedule a follow-up appointment

I see that you have Medicare and you have not had a Medicare Wellness visit in the past year. We are pleased to offer this Medicare free benefit called the Medicare Annual Wellness Visit. This is a yearly visit and a great opportunity for you and your provider to make a plan on how to stay healthy and well.

During the visit your healthcare team will talk with you about your medical history, your current health, and your risk for certain illness and injuries. Before you leave you will be given a personalized prevention plan that you and your provider think will help you stay healthy. There is no charge for the Wellness Visit. If you do have health issues that need to be addressed at the same time, you may be responsible for coinsurance and a Part B deductible would apply. What is a good day and time for you?

Example 2: Patient calls because of information they received about Welcome to Medicare or Annual Wellness visit:

Thank you for calling. I would be happy to provide some more information about what a Medicare Annual Wellness Visit is and how it can benefit you.

(see scripting above depending on which visit patient is due for)

What is a good day and time for you?

Example 3:

Patient: Hi I need to schedule an annual wellness visit.

Scheduler: Okay. Are you referring to the annual wellness visit that is covered by Medicare?

Patient: Yes *(if patient says no, see below)*

Scheduler: That's great do you have a date or time that works best for you? *(Once appointment is scheduled relay the below message)*

(ONCE THE PATIENT CHOOSES A DATE AND TIME FOR THE APPOINTMENT)

Scheduler: Now, I just want to remind you, the purpose of an annual wellness visit is to create a prevention plan. To help your prevention plan be accurate and specific to you we will need some information regarding your physical health, emotional well-being, social support, and your economic needs. This will take about 20 minutes. I can send the questionnaire to you by mail or have a nurse complete it over the phone with you. It is important for this information to be filled out prior to your visit. At your appointment [Provider Name] will use your answers to build a prevention plan that's right for you.

Please be aware, this prevention planning visit does not include a physical. Medicare does not cover an annual physical. If you have something else to discuss such as a medication refill, a sore knee, or any need requiring the provider to perform an assessment, we recommend making a separate appointment to address those concerns since those services are not part of an annual wellness visit. Thanks for taking



the time to help us be part of your health. We look forward to seeing you on (DATE OF APPOINTMENT TIME). Have a great day. Bye.

Patient: Hi I need to schedule an annual wellness visit.

Scheduler: Okay. Are you referring to the annual wellness visit that is covered by Medicare?

Patient: No

If the patient says no, then this needs more investigation. Do they have Medicare or a Medicare advantage plan? If yes, ask what they mean by “wellness” visit and if no they don’t have Medicare or a Medicare advantage plan, then they are not eligible for annual Wellness visit. You may be able to proceed with a yearly Annual Wellness Exam (non-Medicare yearly wellness exam). See PQA’s AWE tools for more direction.

Example 4: Patient schedules IPPE

Patient: Hi I am on Medicare now and need to schedule my yearly wellness visit

Scheduler: That’s great do you have a date or time that works best for you? *(Once appointment is scheduled relay the below message)*

(ONCE THE PATIENT CHOOSES A DATE AND TIME FOR THE APPOINTMENT)

Scheduler: I’m super excited you are taking advantage of this benefit. This is actually the only physical that Medicare covers. This visit will help the provider build a great prevention plan for you during you the visit. Although there is a physical component, the intent of this visit is to focus on Health Maintenance and Prevention. To help your prevention plan be accurate and specific to you, we will need some information regarding your physical health, emotional well-being, social support, and your economic needs. This will take about 20 minutes. I can send the questionnaire to you by mail or have a nurse complete it over the phone with you. It is important for this information to be filled out prior to your visit. At your appointment [Provider Name] will use your answers to build a prevention plan that’s right for you.

If you have something else to discuss during your appointment such as a medication refill, a sore knee, or any need requiring the provider to perform an assessment, we recommend making a separate appointment to address those concerns since those services are not part of a Welcome to Medicare Visit.

Again, this is the only physical Medicare covers. After this in the coming years you will have an annual wellness visit benefit that is fully covered, but its only focus is prevention planning. Thanks for taking the time to help us be part of your health. We look forward to seeing you on (DATE OF APPOINTMENT TIME). Have a great day. Bye.



Example 5:

Scheduler: “Hello, thank you for calling <clinic name>. How can I assist you today?”

Patient: “Hello. My name is Carl. I am a patient of Dr. Smith’s. I just got a letter in the mail asking me to make an appointment for my Annual Wellness Visit. I am confused because I was just in the office three months ago.”

Scheduler: Hello Carl, I am happy to help answer any questions you have about the Annual Wellness Visit. Our nursing staff will start your visit and Dr. Smith will review the plan and findings and close out the annual wellness visit with you. The nurse or medical assistant will review your Health Risk Assessment questionnaire to see how we can help keep you healthy. At this appointment you can expect to review your medications, lifestyle, and wishes about your healthcare. We can also make sure that you are up-to-date on all of the recommended preventive services that are covered by your insurance. These are things like cancer screenings and vaccines.

Patient: I do not want to waste my time and money on an appointment where I don’t spend it all with my doctor.

Scheduler: I understand your hesitation, Carl. However, I want to let you know that this visit is free to you. Dr. Smith provides oversight to his team and will review the results of the visit and will come in to complete your Annual Wellness Visit. The AWV gives you the chance to discuss your health concerns and allows us to make sure we are giving you the best care. This is really a team effort, we want you to stay healthy! Oftentimes, diseases are detected early during the AWV, before they become a problem, which can save you money and time in the doctor’s office in the future.

Patient: I know I take my medications correctly and I already got my flu shot this year. Can you just see if I am due for anything else now and tell me?

Scheduler: This annual wellness visit allows your care team led by Dr. Smith extra time to provide important screenings, review your current health status, understand your wishes, and develop a preventative care plan that will help lead to more healthy days at home!

Patient: I understand you think this visit is important, but I do not have time to come in.

Scheduler: I’m sure you are busy, Carl. This appointment is just one hour out of the year that can make a huge difference in keeping you healthy. Are you sure there is not one hour you are free to schedule the appointment and come in?

Patient: I guess I can spare one hour. When is the next available appointment?

Scheduler: Does Monday, March 20th and 9:30am work for you, Carl?

Patient: Yes, I think that will be fine.

Scheduler: Great! We will give you a call a few days before your appointment to make sure you are prepared. We will send you a Health Risk Assessment form to complete and bring with you to your AWV. Do you prefer mail or would you like a nurse to contact you to complete this over the phone? (Be sure to confirm accurate contact information).



You will also want to bring a list of your medications, vitamins, and supplements you take, along with a list of all of your clinicians and new problems since your last appointment. We will send you this information in the email as well. Do you have any questions for me now?

Patient: No. Thank you for your help.

Scheduler: My pleasure. Have a great day, Carl. Bye.

Patient: Bye.



Provider Encourages AWW

Example 1:

MR/MRS. (PATIENT NAME), (RECEPTION/NURSE) let me know you haven't had your Annual Wellness Visit yet, is that right?

(Patient should answer no and will either say okay, and opt to schedule on the way out or ask why they need one or if they can do it now)

Provider responds.

The annual Wellness visit is a very different type of visit. It takes preparation and it is important. Often times when I see patients, my time is spent addressing a current problems. Often opportunities to prevent new problems are overlooked. This appointment is meant to be our opportunity to assess your health risks. We will help build a proper prevention plan. To help your plan be accurate, we'll need some information regarding your physical health, emotional well-being, social support, and your economic needs. Our time at this visit will focus on health maintenance and prevention strategies. This is fully covered by Medicare. When you check out, reception will help you schedule the appointment.

Talking to Patients about Dual Visit AWVs

Reminders

- Fee-For-Service clinics can utilize the dual visit method and drop the claim for both visits
 - This requires two different notes
 - The patient is required to pay a co-pay for the second visit (they may have been expecting a free visit)
 - This may be the only way to get the patient to complete an AWV if they are resistant/do not have the means to come in more than once per year
- Rural Health Clinics *can* use dual visit AWVs, but they will still only receive one AIR rate
 - It is recommended that you drop the claim for the AWV instead of the E/M because this claim will capture the most HCC codes (*ICD-10 diagnosis codes used to increase your Risk Adjustment Factor*) and will get credit for completing these visits
 - Dropping the claim for the AWV and not the E/M will also encourage patients to attend these visits, since they are expecting the visit to be free
 - Remember, this may be the only way to capture an AWV for certain patients who are resistant/do not have the means to come in more than once per year
- Providers receive RVU's for BOTH visits regardless of which claims are dropped with a charge, and regardless of how much of the AWV nurse-led
 - Welcome to Medicare/Initial Physical and Provider Examination – 2.43
 - Initial Annual Wellness Visit – 2.43
 - Subsequent Annual Wellness Visit – 1.5

How to introduce the concept of dual visits to patients

Our providers are encouraging all Medicare patients to come in for an Annual Review. We feel this new service will allow us to get a better overall picture of your health and your healthcare team, which will help us expand the support we provide and improve your care. The annual review is done in the clinic with a nurse. He or she will go over your medical history, medications, and concerns. This helps us make sure our records are complete and find areas of your health history we didn't know about. Then the nurse will develop a plan to keep in touch with you, and make sure they are available to answer any questions.

After your time is done with the nurse – about 30 minutes – you will see your provider. The time spent with your provider is meant to review the information you gathered with the nurse and answer any questions you may have. You won't have a physical exam, but if you need one an appointment can be made for you to return at your convenience.

The visit will take about 1-hour total, and you will likely have a co-pay for the review done with the provider. If you have questions about your conditions, have multiple conditions, or feel you need extra support, this service could be really beneficial for you.

Using Motivational Interviewing (MI) Techniques

The “Spirit of MI” relates to the feel of the conversation. Motivational interviewing is a person-centered and goal-oriented approach. Incorporating health coaching tools in our conversations can help promote a trusting, comfortable conversation. The following tools will demonstrate how we can blend components of Motivational Interviewing (MI) into our outreach and scheduling conversations. Tools to include OARS, Spirit of MI and deconstructing resistance (Change Talk).

OARS is our acronym for how we communicate with patients:

- Open-ended questions – staying away from “yes/no” questions and answers
- Affirmations – whether you agree with what the patient is saying or not, affirming what they say and verbalizing that you hear them
- Reflections – rephrasing a patient’s statement in order for them to think about or capture the meaning behind what they said
- Summaries – a simple reflective listening technique that tells the patient you understand what they’re saying

The “Spirit of MI” means:

- Collaboration/Partnership: Working for and with the person
- Acceptance: Absolute worth of the patient and what they bring
- Evocation: Identifying motivation & resources already within the person
- Compassion: Promoting the person’s welfare and prioritizing their needs

Deconstructing Resistance (Change Talk) → Ambivalence consists of reasons for and against change. It is easy to see those who are easily agreeable as “cooperative” and those who are not as “resistant”.

Resistance is a normal component of ambivalence.

- Avoid arguing, persuading or “righting” the problem
- Ask questions and utilize your “toolbox” to help engage the conversation and evoke conversation
- Active, reflective listening is a key component
- Always work towards building rapport and trust
- Remember - don’t assume, be non-judgmental and avoid unsolicited advice

Example 1: EASY PATIENT (3.5 minutes)

Scheduler: Hello Mrs. Kilpatrick - I am from Dr. Signifies office. We are contacting all our eligible patients to schedule their Annual Wellness Visit. First, I would like to share with you a little bit about the Annual Wellness Visit and how important it is for you to use this benefit that Medicare provides. Is that okay with you?

Patient: Hi, I am not sure I understand what you are calling about. What is this AWV you speak of and who told you to call me?



Scheduler: Great questions, Mrs. Kilpatrick. I understand you would like to hear the details of why I am calling and would like me to explain the AWV in a bit more detail. Happy to share that information. I am calling from Dr. Signifies office and he has recommended we reach out to you to get you scheduled for your yearly Annual Wellness Visit. As a Medicare consumer, you are allowed a comprehensive Annual Wellness Visit every 12 months. This examination will help your doctor identify any health risks you may have, and allow us to work with you to develop a plan to address your health care needs. Our focus is to help you reach your goals in getting or staying healthy. Medicare pays 100% of the cost for this exam with no out-of-pocket expense to you. At this visit, if we need to address other medical concerns (like a sore knee or other medical conditions), we want you to know you may have a deductible or copay. Does that help answer your question?

Patient: It does answer my question, thank you. I honestly don't think I need it though. I know Dr. Signifies wants me to come in but I am really doing okay. I am not having any trouble right now and I was just there a month ago.

Scheduler: Thank you, Mrs. Kilpatrick. I understand you recently saw Dr. Signifies and if it is ok with you, I would like to explain why this visit is so important.

Patient: Yea, that would be great.

Scheduler: Your yearly Annual Wellness Visit is geared at prevention. This visit really offers the opportunity to review your medications, conditions, health risks and screening tests that might be due. We find this visit important to help identify risks now to ensure we are working together to keep you happier, safer and healthier in the future.

Patient: Oh, I see. So it's not like a regular visit. That helps make sense of it. Ok, if Dr. Signifies thinks I should have one, then I will go ahead and schedule.

Scheduler: What would be a good day to get your Annual Wellness Visit scheduled for you?

Patient: Anytime after the next 2 weeks works for me. I am leaving for an extended vacation. I am heading out on a cruise to Cozumel!

Scheduler: That is incredible, Mrs. Kilpatrick! I am sure you will have an amazing time! Can't wait to hear all about it when you come in for your visit. Ok, how about ____ @ ____? Does that day and time work for you?

Patient: That works for me.

Scheduler: Great! Thank you. I have got you down. To prepare for this visit, please bring all medications, vitamins (including inhalers and injectable), supplements and topical creams you are taking so we can update your records. When you arrive your doctor may ask that you complete a Health Risk Assessment form to assist us in developing a personalized prevention plan for you to stay healthy. We look forward to hearing about your travels and seeing you at your upcoming visit. Thank you so much for your time today.

Patient: Sounds good. Thank you!



Example 2: HARD PATIENT (6 minutes)

Scheduler: Hello Mrs. Kilpatrick - I am from Dr. 's Signifies office. We are contacting all our eligible patients to schedule their Annual Wellness Visit. First, I would like to share with you a little bit about the Annual Wellness Visit and how important it is for you to use this benefit that Medicare provides. Is that okay with you?

Patient: Hi, I am not sure I understand what you are calling about. What is this AWW you speak of and who told you to call me?

Scheduler: Great questions, Mrs. Kilpatrick. I understand you would like to hear the details of why I am calling and would like me to explain the AWW in a bit more detail. Happy to share that information. I am calling from Dr. Signifies office and he has recommended we reach out to you to get you scheduled for your yearly Annual Wellness Visit. As a Medicare consumer, you are allowed a comprehensive Annual Wellness Visit every 12 months. This examination will help your doctor identify any health risks you may have, and allow us to work with you to develop a plan to address your health care needs. Our focus is to help you reach your goals in getting or staying healthy. Medicare pays 100% of the cost for this exam with no out-of-pocket expense to you. At this visit, if we need to address other medical concerns (like a sore knee or other medical conditions), we want you to know you may have a deductible or copay. Does that help answer your question?

Patient: I remember now. I don't need this visit. They asked me to get this done last year and I told that person NO too. Why do you people keep calling me about this? I was just there a month ago!

Scheduler: Thank you, Mrs. Kilpatrick. I understand you recently saw Dr. Signifies and if it is ok with you, I would like to explain why this visit is so important and answer any questions you may have.

Patient: I don't know. You people keep calling me to come in. I don't think I need to do that. I am fine. I feel fine. I don't need anything and honestly, I think you people are just trying to take my money.

Scheduler: I appreciate you telling me how you feel. I am hearing that you have concerns about the cost and value of the visit. I would be happy to explain the benefits and the visit in more detail if that is ok with you?

Patient: I guess.

Scheduler: Your yearly Annual Wellness Visit is geared at prevention. This visit really offers the opportunity to review your medications, conditions, health risks and screening tests that might be due. We find this visit important to help identify risks now to ensure we are working together to keep you happier, safer and healthier in the future.

Patient: Oh, I see. So it's not like a regular visit? I just come in and talk?! Why in the world would I do that?

Scheduler: Great question, Mrs. Kilpatrick. I would love to explain the benefits in more detail. The benefits of this visit include multiple screenings geared at identifying all the elements that make up you and your health. This visit isn't just a talking visit per say but rather, a time for you and your care team to



review your medical history, conditions, provide education and set goals together, identify any preventive health screenings that you may be due for and great news - Medicare covers the cost of the annual visit 100% so there is no cost to you.

Patient: Oh. So I don't have to pay for it?

Scheduler: You sure don't.

Patient: Well, ok. Give me a minute to think about it. I am really busy. I can't keep up with everything that everybody is asking me to do. I have too much stress and I just don't know if I have time for this. **4 signifyhealth.com** | info@signifyhealth.com

Scheduler: Thank you for sharing that with me, Mrs. Kilpatrick. Sounds like you are being pulled in a few different directions these days. Is there something that we can do to help?

Patient: I don't know. I just feel overwhelmed.

Scheduler: I am listening, Mrs. Kilpatrick. Would you mind telling me more about what makes you feel so overwhelmed?

Patient: For one, all the doctor visits. Not just for me but for my husband. I feel like we always have to be somewhere for something and I am tired.

Scheduler: I am hearing you say that you are his primary caregiver and you put a lot of time and effort into ensuring he has everything he needs. What do you need to help you handle all these appointments better?

Patient: I think I just need someone to talk with. I want someone to listen.

Scheduler: If okay with you, I would love to share a couple reasons why the AWW would be a great opportunity for you to have this conversation with your Dr. Signifies.

Patient: Yea, that would be ok.

Scheduler: Great. The AWW is truly a time for you to sit down with your healthcare team and talk through what has been going on in your life. This visit is not limited to just a medical visit but also includes a screening to gauge your stress and mental health. This is a great opportunity for us to meet with you to identify the next best steps which could include a referral to a counselor or therapist.

Patient: Yea, I do think that would help. I didn't realize it wasn't just a bunch of useless questions. It's ok to schedule me. I think the sooner, the better so I can get to feeling better.

Scheduler: Thank you, Mrs. Kilpatrick. I will get you scheduled at our first available. How does _____ @ _____ sound to you?

Patient: Sounds good. Thank you.

Scheduler: Thank you. I have got you scheduled. To prepare for this visit, please bring all medications, vitamins (including inhalers and injectable), supplements and topical creams you are taking so we can update your records. When you arrive your doctor may ask that you complete a Health Risk Assessment form to assist us in developing a personalized prevention plan for you to stay healthy. We look forward



to seeing you at your upcoming visit. Thank you so much for your time today. Please remember, if you need anything before we see you, we are here to help.

Patient: Thank you so much.

