

Documenting Medicare Annual Wellness Visit Note

This tip sheet will describe the steps required to document the required data elements for a Medicare Annual Wellness Visit note.

Try It Out

1. From the Provider Schedule Screen, Double click the Patient's name to open the Office Visit Encounter.

Mee	ds Time	Patient	Age/Sex	Visit Type	Notes	Appt Status	Location/Status Checked In	Provider	Referring Provider Creds	My	Research	Outside
	10:00 AM	Odysseus, Fred- IM	73 y.o. / M	Fmg Medicare Annual Wollpass	annual exam	Exam-Rm (Sch)	Exam-Rm (Sch)	Finn-Im Odysseus, MD	Physician Internal Medicine, MD	t		
	11:00 AM	Odysseus, Fatima-IM	36 y.o. / F	Fmg Procedure	arthrocentesis	Exam-Rm (Sch)	Exam-Rm (Sch)	Finn-Im Odysseus, MD		t		

2. Documentation:

- a. **Flowsheets:** Go to your **Flowsheets** Activity. Locate the Medicare Annual Wellness Visit flowsheet. Document pertinent screenings.
- **b.** Notes: From the Notes tab, click the drop down arrow next to + Create Note. You will get a list of available note templates. Click on Medicare Annual Wellness Visit.

← Create Note ✓		₿n
My Note	STANDARD VISIT NOTE	
ing note	MEDICARE ANNUAL WELLNESS VISIT	
Se <u>n</u> sitive	FAM PREOP	tails ≫
🛠 B 🗩 🥸 🖍	Blank Note	C 🕫
1		

i. Within the **Medicare Annual Wellness Visit** note, there are *SmartLists* that will guide you on what is needed for documentation. You can move through the *SmartLists* by clicking **F2** on the keyboard or highlight and delete as needed.

BMI SCREENING REVIEWED (BMI screening (normal/abnormal):21615)
BMI SCREENING PROVIDER DOCUMENTATION:TXT, 140
DEPRESSION SCREENING REVIEWED: {depression screening-pos or neg.21612}
FUNCTIONAL ASSESSMENT (ADL/I-ADL) SCREENING REVIEWED: {funct assess:23072}
FALL RISK SCREENING REVIEWED: {fall risk screening:21613}
ADVANCE DIRECTIVES REVIEWED: {Code Status Discussion:21022}
PATIENT INSTRUCTIONS: {pt instructions:23172}

- ii. The documentation from the **Flowsheets** will pull into the note automatically via *Smartlinks*. If the information in the flowsheets does not appear in your note it may be necessary to re-file the documentation in the **Flowsheets** activity and then refresh the note.
 - 1. Go to Flowsheets and click File.



2. Return to your note and click the refresh icon, to bring in the most recent data from the Annual Wellness Screening Flowsheet.



EpiCare

Tip Sheet