

W E L C O M E T O M E D I C A R E V I S I T

Office Checklist

Patient Name: _____

Date: _____

Medicare Part B Enrollment Date: _____

Items 1-7 (required for reimbursement)*

Suggested elements

1. Medical and social history with special attention to modifiable risk factors

- Tobacco, alcohol, illicit drug use
- Diet
- Physical activity
- Past medical/surgical history (experience with illnesses, hospital stays, operations, allergies, injuries, and treatment)
- Current medications and supplements
- Family history

2. Screening for depression

Use of any appropriate screening instrument recognized by national professional medical organizations

3. Assessment of functional ability and safety

For level of safety, assess:

- Hearing impairment
- Activities of daily living
- Falls risk
- Home safety

Use of any appropriate screening questions or standardized questionnaires recognized by national professional medical organizations

4. Limited physical examination

- Height, weight, and blood pressure
- Visual acuity screen (e.g., Snellen test)
- Other factors based on the history and current clinical standards

5. Performance and interpretation of EKG

Can be performed by physician or qualified non-physician practitioner (QNPP) or referred to outside entity, but primary physician or QNPP is responsible for obtaining results and documenting in medical record

6. Education, counseling and referral

Education, counseling, and referral as determined appropriate based on findings of above 5 assessments

7. Written checklist for obtaining preventive services covered under Medicare

Produce a written checklist (or alternative) to assist your patient in getting the preventive services listed in Table I following appropriate education and counseling about these services

* Federal regulations (42 CFR 410.16) require that all 7 elements be completed during the visit for reimbursement; the EKG may be performed elsewhere.

Table I. Preventive benefits under Medicare Part B

- Hepatitis B, influenza, and pneumococcal vaccines
- Bone mass measurements
- Cardiovascular screening blood tests
- Diabetes screening tests
- Diabetes self-management training services
- Colorectal cancer screening tests
- Prostate cancer screening tests
- Screening mammography
- Screening pap smear and pelvic examinations
- Screening for glaucoma