

ADULT ANNUAL WELLNESS VISIT CHECKLIST

WELLNESS VISIT/PHYSICAL EXAM

- Check/record vital signs with BP <140/90 by the end of the year
- Height, weight, and body mass index (BMI)
- Patient medical/surgical history documented
- Current medication review
- Physical examination
- Physical activity assessment/recommendations
- Fall risk assessment
- Mental health assessment/recommendations for improvement
- Screening for alcohol or substance abuse
- Medicare specific: Advanced Directive, functional status assessment (ADLs including bladder control), and pain assessment

PREVENTIVE SCREENINGS

Annual Screenings:

- Breast cancer screening for women ages 50 – 74
- Chlamydia screening for women ages 16 – 24 (via UA if not time for pap)
- Osteoporosis screening for women ages 65 – 75
- Diabetes screening (HbA1c testing, dilated retinal eye exam, kidney function)
- Lab testing as applicable (STI, serum cholesterol, etc.)

Other Screenings:

- Cervical cancer screening for women ages 21 – 64 (every 3 yrs. or every 5 if hrHPV completed)
- Colon cancer screening for adults ages 50 – 75 (one of the following):
 - ✓ Fecal Occult Blood Test (annually)
 - ✓ FIT-DNA Test (every 3 years)
 - ✓ Flexible Sigmoidoscopy (every 5 years)
 - ✓ CT Colongraphy (every 5 years)
 - ✓ Colonoscopy (every 10 years)
- Spirometry testing for newly diagnosed COPD (within 6 months of diagnosis)
- Bone mineral density test for women ages 67 – 85 (within 6 months of fracture)

VACCINATIONS

- Flu shot annually
- Vaccine review and administration as applicable for age

HELPFUL TIPS

- Utilize 90-day prescriptions
- Schedule next wellness visit prior to patient departure from clinic
- Schedule any preventive screenings prior to patient departure from clinic
- Complete and accurate coding/billing
- Timely filing of claims

