

Annual Wellness Visit Checklist



Annual Wellness Visits (AWV) help providers deliver proactive, personalized care while supporting quality performance and accurate documentation. Use this checklist to ensure key health activities are completed and documented.

Health Activities to Complete During Annual Wellness Visit	Health Activity Status
Medication Listed and Reviewed	☐
Assess Functional Status, Falls Risk and Incontinence Support Needs	☐
Discuss Advanced Care Planning	☐
Check Blood Pressure (repeat if elevated) *	☐
A1c test or lab referral*	☐
Kidney Health Evaluation (requires eGFR and Urine Albumin-Creatinine Ratio)	☐
Breast Cancer Screening Referral (mammogram)*	☐
Colon Cancer Screening Referral (colonoscopy is good for 10 years) *	☐
Diabetic Retinal Eye Exam Referral*	☐
Statin Therapy Evaluation (CVD Risk - moderate or high dose)	☐
Statin Use Evaluation (Diabetes)	☐
Screen for Depression (e.g.: PHQ9)*	☐
Social Needs Screening (e.g.: food, transportation or housing insecurity)	☐
Flu and Covid-19 Vaccination Status	☐
Schedule follow-up appointment	☐

Tips for Providers:

Member Related Interventions:

- Review medication adherence and lifestyle factors; educate on chronic condition management
- Document member refusals of services and next steps
- Promote the Medicare Member Incentive Rewards Program for eligible activities.
- Set clear follow-up expectations before the member leaves (labs, referrals, specialist visit)
- Ensure timely follow-up: Schedule visits within 7 days of an ED visit and within 30 days of an inpatient discharge
- Coordinate with the health plan to order at-home BP monitors and provide ongoing education

Clinical Documentation & Coding:

- Submit applicable CPT/CPTII Codes to reduce medical record collection burden
- Include dates of service and lab results in progress notes
- Ensure all progress notes are signed off after the visit

For any questions or help with documentation, coding, or member incentives, contact Quality Management at QualityManagement@vnshealth.org or your account manager.