Telephone Script: Medicare Wellness Visit/Welcome to Medicare visit

**Instructions:** Call about 2 weeks after invitation was mailed to see if they would like to schedule or have questions about the purpose of the visit.

**Script:**

“Hello, I’m calling on behalf of Dr. \_\_\_\_\_\_\_\_\_\_ at CHCW/CWFM to see if you’re interested in attending on of her/his group medical visits. We mailed an invitation to you about 2 weeks ago and I wanted to see if you had any questions or wanted to RSVP.”

They will have one of several responses…

1. They can’t talk right now or are not interested🡪*Offer to call them back at a more convenient time.*
2. They received the invitation and have questions🡪*Answer their questions using the script below.*
3. They didn’t receive the invitation or don’t remember what the invitation was for🡪*Offer to read them the invitation over the phone.*
4. They received the invitation and are ready to schedule🡪*Transfer them to scheduling/reception to make the appointment in Ellensburg or Yakima or offer to have scheduling call THEM to make the appointment.*

**Script:**

“The Annual Wellness Visit is not the same thing as what many people often refer to as their yearly physical exam. Medicare is very specific about what the “Annual Wellness Visit” includes and doesn’t include.

We have started doing the Annual Wellness Visits in groups, which gives you more time with your doctor and is more interactive and fun! The visit is also free to you, because there is NO CO-PAY! This visit helps you stay healthy and makes sure that you get the most “bang for your buck” from your Medicare insurance. Unfortunately, it’s hard to make sure that preventative care gets done in shorter doctor’s visits so this is a great chance to review what you need with your doctor.

The visit does not include a hands-on exam or any testing that your doctor may recommend, nor does it include any discussion about any new or current medical problems, conditions, or medications. You may schedule another visit to address those issues.

Here’s what to expect during your "Welcome to Medicare" preventive visit

Your doctor will

* Record and evaluate your medical and family history, current health conditions, and prescriptions.
* Check your blood pressure, vision, weight, and height to get a baseline for your care.
* Make sure you're up-to-date with preventive screenings and services, such as cancer screenings and shots.
* Order further tests, depending on your general health and medical history.

Following the visit, your doctor will give you a plan or checklist with free screenings and preventive services that you need and offer to schedule them for you.

Here’s what to bring to your "Welcome to Medicare" preventive visit

* Medical records, including immunization records. Even if your current doctor does the visit, gather as much medical information as you can to make sure nothing is overlooked.
* Family health history. Try to learn as much as you can about your family's health history before your appointment. The information will help you and your doctor better understand what screenings you should get and what to watch for in the future.
* Prescription drugs. Bring a list of any prescription drugs, over-the-counter drugs, vitamins, and supplements that you currently take, how often you take them, and why.
* The names of all your doctors and their specialties.
* Your living will or advanced directive, if you have one.