

Annual Wellness Visit: Student Guide

Please be sure to complete the [online evaluation](#) after your simulation session!

The **purpose** of this simulation-based activity is to understand the purpose and content of an Annual Wellness Visit (also called Medicare Wellness Visit) and how the RN role in conducting these visits represents top-of-scope practice. These visits often are conducted by primary care providers, but can also be done by RNs.

Starting in 2011, Medicare began coverage of Annual Wellness Visits for Medicare beneficiaries. The purpose of this visit is to check for any changes in health information, perform a *Health Risk Assessment*, and develop or update a *Personalized Prevention Plan*. The AWV is not the same as an annual physical. Physical examination normally is not done at this visit and is not reimbursed as part of the visit.

To prepare for this simulation, you will need to complete the assigned readings and videos, and you will also need to review the patient's completed *Health Risk Assessment* *in advance*. We will be using the Health Risk Assessment during the simulation, so you need to review it and identify potential concerns and areas where you need more information from the patient.

Learning Objectives

By the end of this simulation-based experience, the learner will be able to...

1. Understand the purpose of an Annual Wellness Visit (AWV) and what assessments are obtained.
 2. Describe the RN's roles and responsibilities in managing AWVs and how this represents top-of-scope practice.
 3. Use patient-centered care strategies and communication to establish rapport, answer questions, and collect assessment data during an AWV.
 4. Strategize nursing interventions for one or more priority health or health promotion issues identified through the assessment.
 5. Identify opportunities for collaborating with other health care workers to follow-up on relevant AWV assessment findings.
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Expectations

Learners are expected to arrive having (1) fully reviewed this student guide, (2) completed the assigned readings and videos, and (3) completed the Pre-simulation Questions. Students are also expected to have the [Observer Form](#) to complete should they be assigned that role.

In this simulation scenario, you will meet Charlie Plummer, a 78 year old man, for his annual wellness visit. He received notification of the visit by mail, along with the *Health Risk Assessment (HRA)* to

complete. You will collect and analyze the *HRA* (which you will review in the assignments described here) and will collect additional assessments, using the *Annual Wellness Visit Checklist* as a guide. We will pause to prioritize findings and strategize interventions as a group. You will provide teaching on a selected health issue identified in the *HRA*. In debriefing, we will discuss how you would collaborate with the patient on an overall plan of care, provide referrals, and review a schedule for recommended preventive services.

The briefing, scenario, and debriefing will take about 90-120 minutes.

Topics

- Medicare Annual Wellness Visits
- Health and aging
- Screening and prevention
- Fall risk
- Depression
- Home safety
- Collaborative care planning

Required preparation:

- Orange County Healthy Aging Initiative. (2017). Annual wellness visit toolkit video for Orange County [YouTube]. Retrieved from <https://www.youtube.com/watch?v=i46mWOpFmEI>. This is a very good overview video showing how one organization (OSHA) implements AWVs. You will be using forms from the toolkit during the simulation. These forms are linked below for you to review before the simulation. Some notes on the video – it is not entirely clear about who is doing the assessment (because she does not introduce herself, which she should do), but it seems to be a nurse. The physician (geriatrician) discusses the findings with the patient in the video, most of which could be done by the nurse (being careful to stay within your scope of practice). Even when the nurse conducts most of the visit, a provider (physician, nurse practitioner, physician assistant, etc.) reviews the assessment and speaks briefly with the patient at the end of the visit.
- Download the *Annual Wellness Visit Checklist and Patient Information*. Read this document thoroughly. You will be following the AWV Checklist during the simulation and reviewing/administering the assessments that are included. The *Health Risk Assessment* in your toolkit includes responses from your simulated patient. Be sure to review this form and consider your priorities. During the simulation, you will review the HRA with the patient, as well as collecting the other assessment data detailed in the *AWV Checklist*.

Recommended resources (not required):

- Healthwise Staff. (August 22, 2019). Your Medicare yearly wellness visit. Kaiser Permanente. Retrieved from <https://healthy.kaiserpermanente.org/health-wellness/health-encyclopedia/he.your-medicare-yearly-wellness-visit.abr7782>

- Annual wellness visit. (May 2022). Centers for Medicare and Medicaid Services. Retrieved from. <https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/preventive-services/medicare-wellness-visits.html>. Select the tab for “AWV” at the top of the screen, then select and review “Subsequent AWV Components”.
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Pre-simulation Questions

1. What is the purpose of the Annual Wellness Visit? How does it differ from the annual physical examination? How would you explain the purpose of the AWV to a patient?
 2. What are the nurse’s roles and responsibilities in the AWV? What would be outside the RN scope of practice?
 3. How can the AWV benefit the patient and improve their health status?
 4. What potential health problems can you identify from the *Health Risk Assessment*? What additional information would you want?
 5. What preventive services could you coordinate? Review the *Preventive Services Card* and compare to the data you have in the patient’s responses.
 6. What health care team members might be involved with the AWV and follow-up? How can responsibilities be coordinated between these team members?
 7. After reviewing the AWV forms, do you have any questions?
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Observer Form

Learners who are not active participants in the scenario are expected to complete an Observer Form. Observers' insights offer key learning opportunities during debriefing. Have this form ready to fill out during the scenario.

Annual Wellness Visit: Student Observer Form

Instructions: This Student Observer Form is to help you apply critical thinking as you watch the simulation and to prepare you to actively participate in the debriefing. As you observe, complete the checklist based on are the simulation learning objectives and take notes on the debriefing questions.

Performance	Notes (What went well? What could have gone differently?)
<input type="checkbox"/> Learning Objective 1: Understand the purpose of an Annual Wellness Visit (AWV) and what assessments are obtained.	
<input type="checkbox"/> Learning Objective 2: Describe the RN's roles and responsibilities in managing AWVs and how this represents top-of-scope practice.	
<input type="checkbox"/> Learning Objective 3: Use patient-centered care strategies and communication to establish rapport, answer questions, and collect assessment data during an AWV.	
<input type="checkbox"/> Learning Objective 4: Strategize nursing interventions for the priority health or health promotion issues identified through the assessment.	
<input type="checkbox"/> Learning Objective 5: Identify opportunities for collaborating with other health care workers to follow-up on relevant AWV assessment findings.	