



Health care benefits include early identification of certain medical conditions and starting treatment before they become chronic or life-threatening.

These benefits are offered through the Initial Preventive Physical Exam (or Welcome to Medicare Exam) and, thereafter, through an Annual Wellness Visit each year. This resource will describe each exam and how it may benefit your health and overall wellness.

▶ Initial Preventive Physical Exam

The Initial Preventive Physical Examination, also known as the “Welcome to Medicare Exam,” is available to all beneficiaries free of charge during the **first 12 months of Medicare Part B coverage**.

- This one-time preventive visit helps you and your doctor develop a personalized plan to prevent disease, improve your health, and maintain wellness.
- **Key Points to Remember:**
 - This is a free service with no copayment or deductible required.
 - Once you have enrolled in Part B, simply contact your doctor to schedule your Welcome to Medicare Exam.
 - The visit includes a comprehensive review of your medical history, preventive tests and screenings, and planning for a healthy future.

What should you expect during the exam?

During the visit, your doctor will:

- ✓ **Record and Evaluate:** Your medical and family history, current health conditions, prescriptions, and discuss end-of-life planning.

- ✓ **Check:** Your blood pressure, vision, weight, and height to get a baseline for your care.
- ✓ **Ensure:** You are up to date with preventive screenings and services, such as cancer screenings and vaccinations.
- ✓ **Order:** Further tests as needed based on your general health and medical history.

After the visit, your doctor will provide you with a plan or checklist with free screenings and preventive services you may need, such as mammograms or colonoscopies. This is also an excellent opportunity to discuss any concerns you may have with your doctor.



What should you bring to the exam?

- ✓ **Medical records:** Bring your medical records, including immunization records. Even if your current doctor is conducting the exam, gathering this information ensures nothing is overlooked.
- ✓ **Family health history:** Try to gather as much information as possible about your family’s health history before your appointment. This helps you and your doctor better understand what screenings you may need and what to watch for in the future.
- ✓ **Prescription drugs:** Bring a list of all prescription drugs, over-the-counter medications, vitamins, and supplements you currently take. Include how often you take them and the reason for each.

▶ Annual Wellness Visit

People with Medicare are eligible for an annual wellness exam once every 12 months. This yearly visit helps you and your doctor develop or update a personalized plan to prevent disease based on your current health and risk factors.

Key Points to Remember:

- You must have had Medicare Part B for longer than 12 months
- If you already had your Welcome to Medicare Exam, your **first** annual wellness exam cannot take place until 12 months later.
- You do not need to have had a Welcome to Medicare Exam to qualify for an Annual Wellness Visit.
- This visit is not a routine physical exam; Medicare does not cover routine physical exams.
- There is no cost for the exam itself. *

** Additional tests or services during the same visit that are not covered under these preventive benefits may require coinsurance, and the Medicare Part B deductible may apply.*



Health Professionals: Any health professional, including physicians, physician assistants, nurse practitioners, clinical nurse specialists, and others working under physician supervision, can provide an Annual Wellness Visit.

During the visit, your doctor will:

- ✓ **Review:** Your Medical and family history.
- ✓ **Take:** Blood pressure, weight, height, body mass index, and other routine measurements.



- ✓ **Assess:** For any signs of cognitive impairment.
- ✓ **Evaluate:** Potential risk factors for depression, functional ability, and safety level.
- ✓ **Develop:** A written screening schedule (such as a checklist) for the next five to 10 years, including a list of risk factors and recommended interventions.
- ✓ **Discuss:** Advance directives, offering to talk with you about your preferences.
- ✓ **Provide:** Personalized health advice and referrals for health education and preventive counseling.

What to Bring to your Annual Wellness Visit

Please bring the following information with you:

- ✓ **Medical records:** including immunization records.
- ✓ **Family health history:** Provide as much detail as possible.
- ✓ **List of medications and supplements:** Include details on how often and how much of each you take, including calcium and vitamins.
- ✓ **List of your current providers and suppliers:** Involved in your care.

If you would like help with information from this publication, please call the Florida Elder Helpline toll-free at 1-800-96-ELDER (**1-800-963-5337**) and request to speak with a **SHINE Counselor**.

The Florida SHINE (Serving Health Insurance Needs of Elders) Program offers free and unbiased health insurance counseling to individuals with disabilities, seniors, and their family members or caregivers. For more information on health insurance issues, visit our website at FloridaShine.org.