A Closer Look: The “Welcome to Medicare” Exam

Anyone who has Medicare Part B is entitled to receive a one-time “Welcome to Medicare” exam (also known as the Initial Preventive Physical Examination, or IPPE) within the first 12 months of enrolling in Part B.

What happens during the “Welcome to Medicare” exam?

The Welcome to Medicare exam offers an opportunity for the provider to review the beneficiary’s medical and personal history, conduct several simple measurements and screenings related to the beneficiary’s well-being, and outline a plan for future preventive services.

What does the beneficiary need to do to prepare for the exam?

The beneficiary should come to the exam with:

- Information (if known) about his/her family’s health history
- Personal history of immunizations, illnesses, hospitalizations, surgeries, etc. If the beneficiary is seeing a new provider, he/she may wish to bring copies of previous medical records to the visit.
- A list of all prescription, over-the-counter, vitamins, and supplemental medication taken by the beneficiary.

What does the provider do during the exam?

The health care provider will conduct the following during the Welcome to Medicare exam:

- Measurement of height, weight, and blood pressure
- Calculation of body mass index
- Simple screening of visual acuity
- Depression screening (no specific test/tool is required; this may be accomplished through probing for sadness, loss of feelings of pleasure, changes in sleep or appetite, feelings of isolation, suicidal ideation)
- Detection of cognitive impairment (no specific tool or test specified)
- Assessment of functional ability and level of safety, including risk of falls, home safety, and performance of activities of daily living.

The provider will also offer:

- To talk to the beneficiary about advance directives and end-of-life planning
- A written plan/schedule of appropriate screenings covered by Medicare Part B
What does the Welcome to Medicare exam cost?

The beneficiary pays nothing if the provider accepts Medicare assignment. However, if this exam is performed at the same time as other tests/services (e.g., lab tests or screening) that are subject to Part B cost-sharing, then the beneficiary may be responsible for those costs, including meeting the Part B deductible and 20% co-insurance.

What other services may be delivered if clinically indicated during the same encounter as the “Welcome to Medicare” exam?

- EKG
- Lab tests
- Evaluation and management of an acute or chronic condition

Who can deliver (i.e., who is the provider of) the “Welcome to Medicare” exam?

The following providers are authorized to conduct the exam:

- Medical Doctor (MD)
- Nurse Practitioner (NP)
- Physician Assistant (PA)
- Clinical Nurse Specialist

Does a beneficiary need to have a Welcome to Medicare exam prior to having the Annual Wellness Visit?

A beneficiary is not required to have the Welcome to Medicare exam before having an Annual Wellness Visit.

References

See the Centers for Medicare & Medicaid Services (CMS) Medicare Claims Processing Manual, Chapter 12 – Physicians/Nonphysician Practitioners, Section 30.6.1.1, titled Initial Preventive Physical Examination (IPPE) (pp. 41-42) for guidance on what’s included in the “Welcome to Medicare,” or IPPE.

See the Centers for Medicare & Medicaid Services (CMS) Quick Reference Information: The ABCs of Providing the Initial Preventive Physical Exam (revised January 2015) for information on specific billing codes for providers to use when conducting the exam.