

# My Medicare Wellness Visit Checklist

*Brought to you by Clear Benefit Solutions*

Most "Wellness" visits are conversations, not physical exams. Use this checklist to make sure you and your doctor cover all the bases.

## 1. What to Bring With You

- Medication List: Include prescriptions, over-the-counter drugs, vitamins, and supplements (include dosages).
- Provider List: A list of any specialists, pharmacists, or therapists you currently see.
- Immunization Records: A history of your recent flu, pneumonia, COVID-19, and shingles shots.
- Medical History: A brief summary of any family health history changes.

## 2. Topics to Discuss

- Preventative Screenings: Ask, "Based on my age and history, which screenings (cancer, heart, bone density) am I due for this year?"
- Fall Prevention: Discuss any balance issues or recent trips/stumbles.
- Cognitive Health: Mention if you've had any concerns with memory or "brain fog."
- Mental Health: Discuss your mood, energy levels, and any feelings of anxiety or depression.

## 3. Questions to Ask Your Doctor

- "Are there any new vaccines or boosters I should consider this season?"
- "Can we review my prescriptions to see if any of them are no longer necessary?"
- "What is my personalized prevention plan for the next 12 months?"
- "Do I need any referrals for the screenings we discussed?"

## 4. Before You Leave

- Get it in writing: Ask for a printed copy of the preventative screening schedule your doctor recommends.
- Schedule the follow-up: If a screening was ordered, try to put it on your calendar before you walk out the door.

Note to Medicare Beneficiaries: Remember, the "Welcome to Medicare" and "Annual Wellness" visits are \$0 out-of-pocket. However, if your doctor performs additional tests or treats a specific new illness during the same appointment, you may have a small co-pay for those specific services.



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