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### Office of Integrated Health – Health Supports Network **Annual Healthcare Visits** **Health & Safety Alert**

#### Introduction

Annual healthcare visits with a primary care physician (PCP) are an important, evidence-based part of wellness and are aimed at focusing on health, fitness, and preventive care, not just addressing problems or illness (22) (6).

In the 1940's routine annual physical examinations became a standard in American medical practice. As the years passed, numerous medical professional associations and groups have called for changes to the standard, routine, annual physical exams which were invasive, stressful, and a poor use of PCP resources (e.g., time, money, staff) for patients in good health (2).

Since then, PCPs have pushed for a more holistic, cost-effective approach to annual healthcare visits which center on routine screenings and involve more person-centered care planning (2).

The push for routine screenings is based on the idea that early detection of health issues will likely lead to improved outcomes for individuals (2).

This health risk assessment approach takes into consideration the individual's age, sex, current health, family health history, personal health history, as well as the non-medical risk factors which influence health known as the **social determinants of health** (2) (10).



## Recurring Annual Healthcare Visits Benefit Both the Individual with DD and their PCP

An individual with intellectual and developmental disabilities (DD) typically experiences poorer health, increased mental illness, a shortened life expectancy, and reduced access to healthcare when compared to those in the general population (19) (25) (17) (13).

Many individuals with DD are reliant on their family members and caregivers to schedule, transport, and participate in needed annual healthcare visits, preventive screenings, and immunizations.

Regular healthcare visits have the potential to minimize the negative effects of these elevated risks (19) (24) (25) (13).

Annual healthcare visits have been shown to increase both referrals to specialists and annual preventive screenings for the individual with DD (24) (25).

Annual visits provide increased time for interaction between the individual with DD and their PCP to:

- Identify commonly avoidable health issues early, which may reduce risk of a preventable death (24) (25).
- Assess the individual in a state of wellness (a low stress situation), versus when the individual is feeling sick (a high stress situation). Individuals may be more likely to provide useful information to their PCP when they are not being stressed and fatigued by illness or discomfort (19) (24).
- Become more familiar with each individual's unique way of communicating, which may include facial expressions, eye gaze, hand, and body movements, etc., all of which are extremely helpful when assessing those with communication difficulties, non-verbal individuals, and those who are diagnosed with increased levels of disability (24) (19).
- Develop an understanding of how the individual expresses signs of physical pain or discomfort, which may be misinterpreted as behavioral challenges, especially in individuals who don't use words to communicate (25) (13).
- To build a relationship and grow trust with the individual (1) (22) (16) (6) (7).
- Determine what an individual's baseline or general state of wellbeing is like on a regular day-to-day basis, versus when the individual is ill. This contrast can help a PCP to determine the seriousness of an illness or health problem the individual is having. It gives a PCP a comparison of how the individual behaves, looks, acts, etc. when well, versus when the individual is weak, sick, or in pain.



## Preparing for Any Type of Annual Healthcare Visit

Prevention of possible future health problems and the completion of a detailed personal and family health history is the purpose of an annual healthcare visit. Each visit is an opportunity for the PCP to evaluate the individual's health and to provide the PCP with as much information possible to ensure the health history is correct and complete (26) (18) (20). Individuals with chronic health conditions or disabilities are encouraged to have annual healthcare visits (7).

The average amount of time allotted for a PCP to complete an annual visit can range between 15 to 30 minutes. It is important to be as prepared as possible, so you can communicate all questions and concerns in a timely manner (15).

The following information should be taken to an annual healthcare visit:

- A list of all current medications, including vitamins and mineral supplements.
- A list of dates and information relating to any hospital admissions, outpatient surgeries, urgent care visits, or emergency room visits an individual has experienced since their last appointment.
- The names, addresses and contact information of all healthcare providers, including doctors, pharmacists, therapists, home health nursing agencies, and anyone else who is providing care to the individual.
- Immunization records, including flu, pneumonia, or COVID-19 vaccines.
- A list of any questions you might have, so do not forget to ask something while you are at the appointment.
- HIPAA releases, guardianship, and/or power of attorney documents.
- Any family-related health history.
- A copy of the individual's Durable Do Not Resuscitate Order (DDNR), if one has been executed (26) (18) (20).

## What May Be Included in an Annual Healthcare Visit?

It is up to each PCP to decide what they will include in the annual healthcare visit, based on the individual's history, presenting concerns, and insurance coverage. There is no universally accepted definition of what is included. However, most annual healthcare visits include at minimum a set of vital signs (blood pressure, temperature, pulse, respirations, and oxygen level) and height/weight measurements (2).

The following services may also be included in an annual healthcare visit:

- An examination of the eyes, ears, nose, and throat.
- Listening to the heart and lungs.
- Feeling the lymph nodes in the neck and under the arms.
- An assessment of the skin.

- Assessment of the hands and feet for swelling.
- A check of motor function and reflexes.
- A breast exam.
- A pelvic or rectal exam.
- Lab work based on recommendations for age and sex, which might include a urinalysis, a complete blood count (CBC), and an electrocardiogram (EEG).
- A review of any current health concerns.
- Development of a preventive plan. A preventive plan may include the following:
  - Suggested lifestyle improvements depending what issues came up during the annual healthcare visit.
  - New health goals for improving diet, losing weight, and increasing activity.
  - New medications prescriptions.
- Directives on when the PCP wants to see the individual again for a follow-up appointment (22) (6) (3). Before leaving the PCP's office, it is always a good idea to set up the next appointment, ask for a reminder call, and add the date to the calendar (11).

## What Questions will be Asked During an Annual Healthcare Visit?

The PCP may ask questions, such as:

- Has anything changed since the last visit?
- Have there been any changes to sleep or eating patterns?
- Has anything changed with urination or bowel habits?
- How often is alcohol used or does an individual smoke?
- Family history questions, such as what chronic health conditions did the individual's father or mother have, if any?
- General life questions about how work is going, how is life at home, and/or if there are any new life stressors?

## Follow-Up After an Annual Healthcare Visit

After the annual healthcare visit is complete, there may be additional tasks the PCP orders before the next appointment (11).

Some of these might include:

- A referral to a specialist for a specific health condition.
  - Ask the PCP what specialist they recommend, or review insurance coverage to find a specialist who accepts the individual's insurance.

- Call and set up an appointment with the specialist as soon as possible. Tell the specialist physician the name of the PCP who recommended the appointment and the reason for the visit.
  - During the appointment with the specialist, make sure to ask if the visit information can be sent to the PCP, so the PCP will have a copy of the specialist notes and suggestions. A release of information form may need to be signed.
- The PCP may give an individual an order for some preventive screenings to be done and will give instructions on where to schedule the screenings.
  - General preventive screenings may be required when an individual reaches a particular age group, and some are specific to males or females.
  - An order for any preventive screening should include the patient's name, date of birth (DOB), contact information, the order date, the preventive screening requested, the PCP's name, contact information, and signature.
  - Make sure to take the PCP's order to the preventive screening appointment; they will need it to complete the screening.
- Recommendations or orders for additional immunizations.
  - Ask the PCP if the individual can receive immunizations in their office. (Some PCP offices offer immunizations, some don't).
  - If the individual cannot receive immunizations at their PCP's office, ask the PCP where they can obtain them locally. Many pharmacies now offer routine immunizations. If there are no pharmacies in your area who do, please contact your local health department to find out when they offer immunizations. In Virginia, there is a health department locator [here](#).
- Call the PCP's office if there are any questions or concerns between visits or if unclear about next step instructions.

## **Individuals Who Cannot Tolerate Some Healthcare Services**

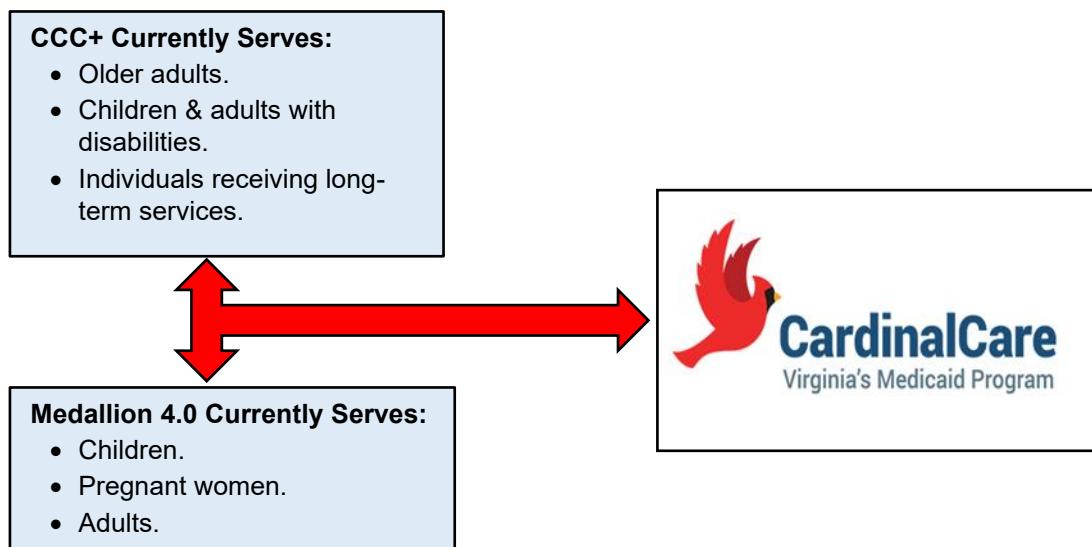
- Some individuals may require a desensitization period and or anxiety reducing strategies that could include relaxation or sensory supports to be able to tolerate certain stressful healthcare services, such as screenings, tests, and procedures, for a variety of reasons (autism, anxiety, past trauma, etc.) and will need extra help. The help they need might include time to become familiar with the surroundings and people involved, administration of some type of sedating agent, such as an oral medication, nitrous oxide, or general anesthesia.
- If an individual needs sedation during a screening (e.g., bloodwork, pap smear, MRI, CT scan, etc.) consider scheduling several screenings at the same time to reduce the need for repeated stressful experiences. For example, it might be

possible to schedule a dental exam and cleaning while the individual is sedated for bloodwork.

- Caregivers may need to coordinate with several physicians and hospital staff at the same time, to meet the preventive screening needs for some individuals who are not able to be cooperative during certain procedures.
- Provider agencies who need suggestions on how to coordinate between physicians/PCPs and hospital staff may contact the DBHDS, Office of Integrated Health - Health Supports Network nursing team at: [communitynursing@dbhds.virginia.gov](mailto:communitynursing@dbhds.virginia.gov)

## Virginia Medicaid's 2023 Cardinal Care Transition

Starting January 1, 2023, all Virginia Medicaid members are now part of Cardinal Care. **The Cardinal Care program combines Medallion 4.0 and the Commonwealth Coordinated Care Plus (CCC Plus) into one program.** The transition to Cardinal Care is automatic for individuals currently receiving any type of Medicaid (5).



As of July 1, 2025, Cardinal Care Managed Care members have 5 health plan options:

- Aetna Better Health of Virginia: [Aetna Medicaid Virginia](#) 1-855-652-8249
- Anthem HealthKeepers Plus: [Anthem](#) 1-855-323-4687
- NEW Humana Healthy Horizons of Virginia: [Humana Healthy Horizons](#) 1-844-881-4484
- Sentara Health Plans: [Sentara Health Plans](#) 1-877-552-7401.
- United Healthcare of the Mid-Atlantic, Inc: [UnitedHealthcare Community Plan](#) 1-866-622-7982

## Cardinal Care Preventive Services

All of the above listed Cardinal Care MCOs will now cover the following preventive services (DMAS, n.d.):

The following preventive services are available at no cost to members:

- **Adult annual exams.**
- Recommended vaccines, such as tetanus and diphtheria, shingles, hepatitis A and B, influenza, and human papillomavirus.
- Blood pressure and cholesterol screenings.
- Mammography, prostate, and other cancer screenings.
- Individual and group smoking cessation and alcohol counseling.
- Depression screenings.
- Nutritional counseling.

Medicaid members should contact their primary care doctor to schedule one of these preventive services.

All five MCO health plans will revise their ID cards to reflect the new Cardinal Care brand, the blue-and-white Medicaid ID cards will still be valid.



## Medicare Coverage Tips for Enrolled Individuals with DD Waiver (in addition to Cardinal Care/Medicaid)

Many providers have shared their experiences of calling a PCP's office and being told individuals in the DD Waiver with Medicare dual coverage could not have annual physical exams. This may be due to the fact that Medicare has specific names and guidelines for Medicare visits. The following will hopefully bring some clarity.

The Medicare **Initial Preventive Physical Exam (IPPE)**, also known as the **Welcome to Medicare Preventive Visit**, promotes good health through prevention and detection.

Medicare pays for one IPPE per *lifetime* which must be scheduled no later than the first 12 months after the patient's Part B benefits eligibility date. If individuals with Medicare do not receive their IPPE within the first 12 months of eligibility, caregivers should call the individual's PCP and schedule a **Medicare Annual Wellness Visit.\*** Please view the Medicare graphic below for more information or visit [the CMS webpage](#) for more information (5) (27) (20).

**\*Please note: All individuals enrolled in the DD Waivers have Cardinal Care/Medicaid (by default), but if they have dual coverage through Medicare, their Medicare insurance coverage must be used first.**

### Medicare Coverage of Physical Exams—Know the Differences

Initial Preventive Physical Examination (IPPE)	Annual Wellness Visit (AWV)	Routine Physical Examination (See Section 90)
<p>Review of medical and social health history, and preventive services education</p> <ul style="list-style-type: none"><li>✓ Covered only once, within 12 months of Part B enrollment</li><li>✓ Patient pays nothing (if provider accepts assignment)</li></ul>	<p>Visit to develop or update a personalized prevention plan, and perform a health risk assessment</p> <ul style="list-style-type: none"><li>✓ Covered once every 12 months</li><li>✓ Patient pays nothing (if provider accepts assignment)</li></ul>	<p>Exam performed without relationship to treatment or diagnosis for a specific illness, symptom, complaint, or injury</p> <ul style="list-style-type: none"><li>✗ Not covered by Medicare; prohibited by statute</li><li>✗ Patient pays 100% out-of-pocket</li></ul>

The individual's PCP may also instruct the individual to schedule a follow-up appointment for a more comprehensive physical exam (which can be billed through Medicaid, if needed) or the PCP may make referrals to specialists.

This [Annual Wellness Visit video](#) can help you and healthcare professionals understand these exams and their purpose, as well as the requirements when submitting claims for them.

If an individual enrolled in the DD Waivers has Medicare, they also have Cardinal Care (Medicaid) by default, so some of their healthcare services may be covered by their Medicare plan and some services may be covered by their Cardinal Care (Medicaid) plan (5) (27).

For more information, contact your Medicare plan, visit Medicare.gov, or call Medicare at 800-633-4227.

## Caregiver Tips for Annual Healthcare Visit Scheduling

When caregivers are making appointments for annual healthcare visits, it is important to tell the PCP's office what insurance coverage the individual has. The individual's insurance information should be kept up to date with all healthcare providers (5). All individuals enrolled in the DD waivers have Cardinal Care/Medicaid coverage by default, but some may have private health insurance and/or Medicare.

### Insurance Coverage for Individuals in the DD Waiver May Be Different

#### Insurance Coverage:

- Personal insurance plan(s).
- Medicare.
- Cardinal Care/Medicaid\*.



#### Insurance Coverage:

- Medicare.
- Cardinal Care/Medicaid\*.



#### Insurance Coverage:

- Cardinal Care/Medicaid\*.



*\*All individuals enrolled in the DD Waivers have Cardinal Care/Medicaid by default.*

## DD Waiver Individuals who have Private Insurance and Medicare (in addition to Cardinal Care/Medicaid)

These individuals also have full Medicaid coverage and are therefore triple covered by all three insurance policies. Private insurance pays first (in most instances), Medicare pays second, and Cardinal Care/Medicaid pays last (U.S. Centers for Medicare and Medicaid Services, 2022). Individuals with private insurance may qualify for an annual physical as part of their coverage. If not, schedule an **Initial Preventive Physical Exam (IPPE)**, if it is within the first 12 months of enrollment. If unsure, schedule an Annual Wellness Visit (AWV). The PCP can bill Cardinal Care/Medicaid for any services that private insurance and Medicare don't cover.

## DD Waivers Enrolled Individuals who have Medicare (in addition to Cardinal Care/Medicaid)

DD Waivers enrolled individuals who have Medicare, also have Cardinal Care/Medicaid coverage, and are therefore dually covered. Medicare pays first and Cardinal Care/Medicaid pays second (U.S. Centers for Medicare and Medicaid Services, 2022). Schedule the individual for an IPPE (see above graphic) if within 12 months of enrollment. If unsure, schedule an Annual Wellness Visit (AWV). The PCP can bill Waiver Medicaid for any tests or services Medicare doesn't cover.

## All DD Waivers Enrolled Individuals have Cardinal Care/Medicaid by Default

Schedule the individual for an [Annual Wellness Exam](#). The individual's PCP can bill Cardinal Care/Medicaid separately for any tests or services that aren't typically covered under the usual Annual Wellness Exam coverage if the PCP finds a healthcare issue which indicates additional testing or investigation.

## Resources

- **DMAS Newsletters**  
Members can sign-up for the regular DMAS/Medicaid newsletter [here](#).
- [Center for Dignity for Healthcare for People with Disabilities \(AUCD\)](#) - The Center for Dignity in Healthcare for People with Disabilities is a coalition of stakeholders, including health care providers, researchers, individuals with disabilities, and family members. The Center's goal is to identify and reduce life-limiting healthcare inequities faced by people with intellectual and developmental disabilities.
- [How to Understand Your Lab Results](#)  (National Library of Medicine) Also in [Spanish](#)
- [Talking with Your Doctor](#)  (National Library of Medicine) Also in [Spanish](#)

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*To the best of the OIHSN Nursing Team's knowledge the information contained within this alert is current and accurate. If the reader discovers any broken or inactive hyperlinks, typographical errors, or out-of-date content please send email to [communitynursing@dbhds.virginia.gov](mailto:communitynursing@dbhds.virginia.gov) to include the title of the Health & Safety alert with specifics details of concern.*

# Annual Healthcare Visits Quiz/Evaluation

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Email Address: \_\_\_\_\_

Quiz:

1. Annual healthcare exams are meant to:
  - a. Focus on health, wellness and achieving preventive care.
  - b. Focus on existing medical conditions and medications.
  - c. Focus on a specific current illness or sickness.
  - d. Focus on a head-to-toe assessment only.
2. Early detection of health issues may:
  - a. Stop the individual from ever getting sick again.
  - b. Lead to improved outcomes for the individual.
  - c. Lead to immediate surgical removal of their heart.
  - d. Might not do anything for the individual.
3. Many individuals with intellectual and developmental disabilities (IDD) are reliant on others to:
  - a. Schedule appointments.
  - b. Provide assistance during appointments.
  - c. Provide transportation.
  - d. All of the above.
4. Annual visits provide increased time for interaction between the individual with IDD and their PCP to:
  - a. Become familiar with an individual's unique way of communicating.
  - b. Become familiar with an individual's facial expressions, eye gaze, hand, and body movements.
  - c. Develop an understanding of how the individual expresses signs of physical pain or discomfort.
  - d. All of the above.
5. The average amount of time allotted for a PCP to complete an annual healthcare visit is about:
  - a. 15 minutes.
  - b. 45 minutes.
  - c. 30 minutes.
  - d. 60 minutes.
6. It is important to let the individual's PCP know about all health-related events that have happened since the individual's last office visit, such as:
  - a. All hospital admissions.
  - b. Outpatient surgeries or specialty visits.
  - c. Urgent care or emergency room visits.
  - d. All the above.
7. What information should be brought to the annual healthcare visit?
  - a. A current list of all medications including vitamins, minerals supplements and over-the-counter drugs.
  - b. The names, addresses and contact information of all healthcare providers, including doctors, pharmacists, therapists, home health nursing agencies, and anyone else who is providing care to the individual.
  - c. Immunization records, including flu, pneumonia, or COVID-19 vaccines.
  - d. All of the above.
8. An individual with IDD can experience what health disparities and inequities compared to the general population?
  - a. A shortened life expectancy.
  - b. Increased mental illness.
  - c. Reduced access to healthcare.
  - d. All of the above.

## Annual Healthcare Visits Quiz/Evaluation

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Email Address: \_\_\_\_\_

9. What office at the Virginia Department of Behavioral Health and Developmental Services can help licensed provider agencies to coordinate between physicians and hospital staff?
  - a. The Office of Licensing.
  - b. The Office of Behavioral Health.
  - c. The Office of Integrated Health.
  - d. The Office of Substance Abuse.
10. What will help the individual's PCP to make a more accurate diagnosis when the individual with IDD is feeling bad?
  - a. For the PCP to attribute the intellectual or developmental disability to why the individual is feeling bad.
  - b. For the PCP to play a card game with the individual.
  - c. For the PCP to unfamiliar with the individual.
  - d. For the PCP to be familiar with the individual when they are feeling well.
11. What assistance could be offered to an individual that cannot tolerate some healthcare services?
  - a. Give them a warm shower and massage before the healthcare services.
  - b. Administration of some type of sedating agent, such as an oral medication, nitrous oxide, or general anesthesia before healthcare services.
  - c. Talk to them and tell them they will be okay in a calm sweet voice before a healthcare service.
  - d. Nothing can be done to assist an individual who cannot tolerate healthcare services.
12. What is included in an annual healthcare visit?
  - a. An examination of the eyes, ears, nose, and throat.
  - b. Lab work based on recommendations for age and sex, which might include a urinalysis, a complete blood count (CBC), and an electrocardiogram (EEG).
  - c. Listening to the heart and lungs.
  - d. All of the above.
13. Cardinal Care partners with which managed care organizations (MCOs)?
  - a. Aetna Better Health of Virginia
  - b. Anthem HealthKeepers Plus
  - c. Humana
  - d. Sentara Healthcare
  - e. United Healthcare
  - f. All of the above.

### Evaluation:

1. Was the information presented in this Health & Safety Alert helpful?
  - a. Yes
  - b. No
2. Will you use this Health & Safety Alert information to train other staff?
  - a. Yes
  - b. No
3. Will you attend the Regional Nursing Meeting to obtain the Continuing Nursing Education (CNE) unit for this Health & Safety Alert?
  - a. Yes
  - b. Yes, but I would have attended the meeting regardless
  - c. No, I am not a nurse
4. What topic(s) would you like to have presented in a Health & Safety Alert for CNE's?

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5. Other Comments:

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