

MEDICARE INITIAL PREVENTIVE PHYSICAL EXAMINATION ENCOUNTER FORM

Patient's name: _____ Date of birth: _____ Medical record #: _____
Medicare B eligibility date: _____ Date of exam: _____ Date of last exam: _____

MEDICAL/SOCIAL HISTORY

Past personal illnesses or injuries:

Injury or illness	Date	Hospitalized?	Drug allergies:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Medications, supplements and vitamins: _____

Tobacco use: _____
Alcohol use: _____
Drug use: _____

Social history notes (including diet and physical activities): _____

Family history notes: _____

DEPRESSION SCREEN

- 1. Over the past two weeks, have you felt down, depressed or hopeless? Yes No
- 2. Over the past two weeks, have you felt little interest or pleasure in doing things? Yes No

FUNCTIONAL ABILITY/SAFETY SCREEN

- 1. Was the patient's timed Up & Go test unsteady or longer than 30 seconds? Yes No
- 2. Do you need help with the phone, transportation, shopping, preparing meals, housework, laundry, medications or managing money? Yes No
- 3. Does your home have rugs in the hallway, lack grab bars in the bathroom, lack handrails on the stairs or have poor lighting? Yes No

Hearing evaluation: _____

A "yes" response to any of the questions regarding depression or function/safety should trigger further evaluation.

PHYSICAL EXAMINATION

Height: _____ Weight: _____ Blood pressure: _____
Visual acuity: L _____ R _____

ELECTROCARDIOGRAM

Result: _____

Evaluations/referrals based on history, exam and screening:

MEDICARE INITIAL PREVENTIVE PHYSICAL EXAMINATION ENCOUNTER FORM continued

Create two copies of this page: one for your charts and one to give to your patient.

COUNSELING AND REFERRAL OF OTHER PREVENTIVE SERVICES

Service	Limitations	Recommendation	Scheduled
Vaccines <ul style="list-style-type: none"> • Pneumococcal • Influenza • Hepatitis B (if medium/high risk) 	No deductible/no co-pay Medium/high risk factors: <ul style="list-style-type: none"> • End-stage renal disease • Hemophiliacs who received Factor VIII or IX concentrates • Clients of institutions for the mentally retarded • Persons who live in the same house as a HepB virus carrier • Homosexual men • Illicit injectable drug abusers 		
Mammogram			
Pap and pelvic exams			
Prostate cancer screening <ul style="list-style-type: none"> • Digital rectal exam (DRE) • Prostate specific antigen (PSA) 			
Colorectal cancer screening <ul style="list-style-type: none"> • Fecal occult blood test • Flexible sigmoidoscopy • Screening colonoscopy • Barium enema 			
Diabetes self-management training	Requires referral by treating physician for patient with diabetes or renal disease.		
Bone mass measurements	Requires diagnosis related to osteoporosis or estrogen deficiency.		
Glaucoma screening			
Medical nutrition therapy for diabetes or renal disease	Requires referral by treating physician for patient with diabetes or renal disease.		
Cardiovascular screening blood tests <ul style="list-style-type: none"> • Total cholesterol • High-density lipoproteins • Triglycerides 	Order as a panel if possible.		
Diabetes screening tests <ul style="list-style-type: none"> • Fasting blood sugar (FBS) or glucose tolerance test (GTT) 	Patient must be diagnosed with <i>one</i> of the following: <ul style="list-style-type: none"> • Hypertension • Dyslipidemia • Obesity (BMI ≥ 30 kg/m²) • Previous ID of elevated impaired FBS or GTT ... or any <i>two</i> of the following: <ul style="list-style-type: none"> • Overweight (BMI ≥ 25 but < 30) • Family history of diabetes • Age 65 years or older • History of gestational diabetes or birth to baby weighing more than 9 pounds 		

PHYSICIAN'S SIGNATURE: _____ DATE: _____

Developed by Randall O. Card, MD, FAAP, Marquette General Hospital, Marquette, Mich., and Cindy Hughes, CPC, AAFP Coding & Compliance Specialist.
 Copyright © 2005 American Academy of Family Physicians. Physicians may photocopy or adapt for use in their own practices; all other rights reserved. Card RO.
 How to conduct a "Welcome to Medicare" visit. *Fam Pract Manag.* April 2005;27-32; <http://www.aafp.org/fpm/20050400/27howt.html>.