



Medicare Annual Wellness Phone Script: Initial Contact

Hi, this is _____ and I am calling from (name of clinic). As you may remember, I recently went through a health risk assessment/questionnaire with you. We have reviewed this assessment with your provider and you qualify for a free wellness visit here at (name of clinic). This visit provides Dr. X and your health care team an opportunity to talk about preventing problems and focus on how we can help keep you healthy.

This wellness visit is available once a year for free. During the visit, you will be asked some additional questions about your health. Dr. X and your health care team will develop and discuss with you recommendations for keeping you healthy.

Our appointments are on Wednesday mornings at ____ or ____ and you can expect to stay about an hour. Can we schedule your visit for _(date) (time)___?

Now that we have you scheduled we will mail you some paperwork a few days before your appointment. Please fill out what you can. Please bring the paperwork and your medicine bottles including any over the counter medications to your visit. This will help your team better serve you.

Thank you for taking this important step for your health. We look forward to seeing you here at (name of clinic) on (Date) __ at ____!

***Key Elements:**

- 1) Connection with PCP- use the Physician's name
- 2) Focus on keeping you healthy
- 3) If reluctant, may ask: Do you have any further questions? Are there any reasons why this appointment may not work for you or concerns with bringing the paperwork and medications along?

Medicare Annual Wellness Phone Script: Reminder Contact

Hi, this is _____ and I am calling from (name of clinic). I am calling to confirm your appointment with Dr. X on (date) and (time). As a reminder, this is a special visit focusing on wellness and prevention. Please remember to bring your completed health risk assessment that was mailed to you a few days ago. Please also bring your medications, including any of the counter medications. Do you have any questions about your visit? Do you have transportation for your visit?