

A photograph of two women embracing. The woman on the left has dark curly hair and is smiling broadly, wearing a light-colored button-down shirt. The woman on the right is older, has short white hair, wears glasses, and a light-colored top. The background is softly blurred, suggesting an indoor setting with windows. The entire image has a light purple/pink tint.

How to Perform an In-depth Medicare Assessment

How to Perform an In-depth Assessment

Learning Objectives

After completing this lesson, you should be able to:

- Define high-level steps in Medicare advocacy workflow
- Explain in-depth Medicare assessments
- Describe the purpose of an in-depth Medicare assessment
- Demonstrate the types of questions to ask in an in-depth Medicare assessment
- Conduct an in-depth Medicare assessment

Workflow



What is an In-depth Assessment?

- Systematic review to understand all aspects of a client's situation
 - Physical, Emotional, Social, Environmental
- Comprehensive and thorough evaluation
 - Health, Needs, Preferences, Circumstances
- Results in detailed summary of findings
- Serves as the basis for a Patient-Centered Care Plan

What is the Purpose of an In-depth Assessment?

- Gather information
- Identify obstacles
- Identify goals
- Coordinate information

Considerations when Conducting In-depth Assessments

You will need to determine

- Timing
- Using the Umbra Platform
- What information to request ahead of time
- Who should be involved

Tools You'll Need: In-depth Assessment Form

In-depth Assessment Form is in
the Umbra Platform

In-Depth Assessment: Questions to Ask

- Introductions
- Basic client demographics
- Emergency contact/s
- Situation
 - Medical conditions and management
- Prognosis
- Wishlist
- Expectations
- Timeline

In-Depth Assessment: Questions to Ask

- Provider information (PCP and specialists)
- Additional details
 - Transportation, social support, food access
- Insurance
- Education, Employment and Income
- Pharmacy Information
 - Medication Lists and allergies
- Advance Directives
- Other
 - Religion, friends, hobbies, pets

In-depth Assessment: Explain Next Steps

- Create Care Plan
- Set meeting expectations
- Schedule next encounter

Case Study

Mr. Smith is a 72 y/o man who never married and has no children.

- Diagnosis of heart failure
- Recent discharge from hospital
- Limited family support
- Barriers include:
 - Medication management, medication cost, lack of transportation
- Goal to live independently at home

Case Study

Steps to take:

- Prep work and research
- Introduction and build rapport
- Listen to situation
 - Medical conditions and management, goals and barriers
- Ask questions
 - Open ended, direct, and clarifying
- Summarize and set expectations

Thank you!

Lesson Quiz

This assessment is a review of

- What is an in-depth assessment
- Why do an in-depth assessment
- What is included in an in-depth assessment
- What happens after you complete the in-depth assessment