

Implementation of Caregiver Education Visits in a Memory Clinic

Rachel Hart, DO; Whoy Shang, APRN; Tammy Evanow, APRN,
Norton Neuroscience Institute Memory Center, Louisville, KY, USA



Problem

- Alzheimer's disease and related dementias are progressive neurodegenerative diseases, causing progressive decline in cognition and function, and leading to loss of autonomy.
- Caregivers often feel unprepared for this role, and their questions and need for affirmation are expected. There are also sensitive subjects that are best discussed without a patient present.

Aim

By April 2026, our memory clinic will implement a standardized caregiver education visit for patients diagnosed with dementia, increasing the number of caregivers receiving a structured education session to 8 caregivers per month.

Methods

- Medicare now recognizes that educating care partners improves health outcomes for individuals living with dementia. In 2024, CMS began reimbursing for Caregiver Training Services (CTS) under newly approved billing codes dedicated to caregiver education, without the patient present.

Measurement

- Number of Caregiver Education Visits were tracked each month utilizing billing codes (97550, 97551, 96202, 96203)
- Patient visits were tracked with payor source (Medicare, Medicare Advantage, Private Insurance, etc), Payment approval or denial.
- Indirect Caregiver Feedback
 - Expressed directly to APP or BHN
 - Expressed in written form in MyChart



Caregiver Training Education Visits

Caregiver Training Education Codes:

We recognize that care partners often feel unprepared for this role, and their questions and need for support are expected. Medicare now recognizes that educating care partners improves health outcomes for individuals living with dementia. Because of this, we are now able to offer caregiver training visits that focus on strategies and techniques so care partners can comply with patient care plans.

What to expect:

- Care partners may have a scheduled 30 minute in-office visit with our medical nurse practitioner, Whoy Shang, or our psychiatric nurse practitioner, Tammy Evanow. These visits will be completed without the patient present.
- These visits can be one-on-one, and in certain cases, these visits will be offered in a group training session.
- Caregiver training visits will focus on strategies to facilitate patient's functional performance in the home or community.



If you are interested in learning more, or to make an appointment to see one of our providers for a Caregiver Training Educational visit, please contact the patient's provider using MyChart or by calling: (502) 464-4NIN

To learn more about the Norton Neuroscience Institute Memory Center, and to see a provider in one of these locations, visit [NortonHealthcare.com/MemoryCenter](https://www.nortonhealthcare.com/MemoryCenter) or use this QR code for educational videos from our Memory Center Team.

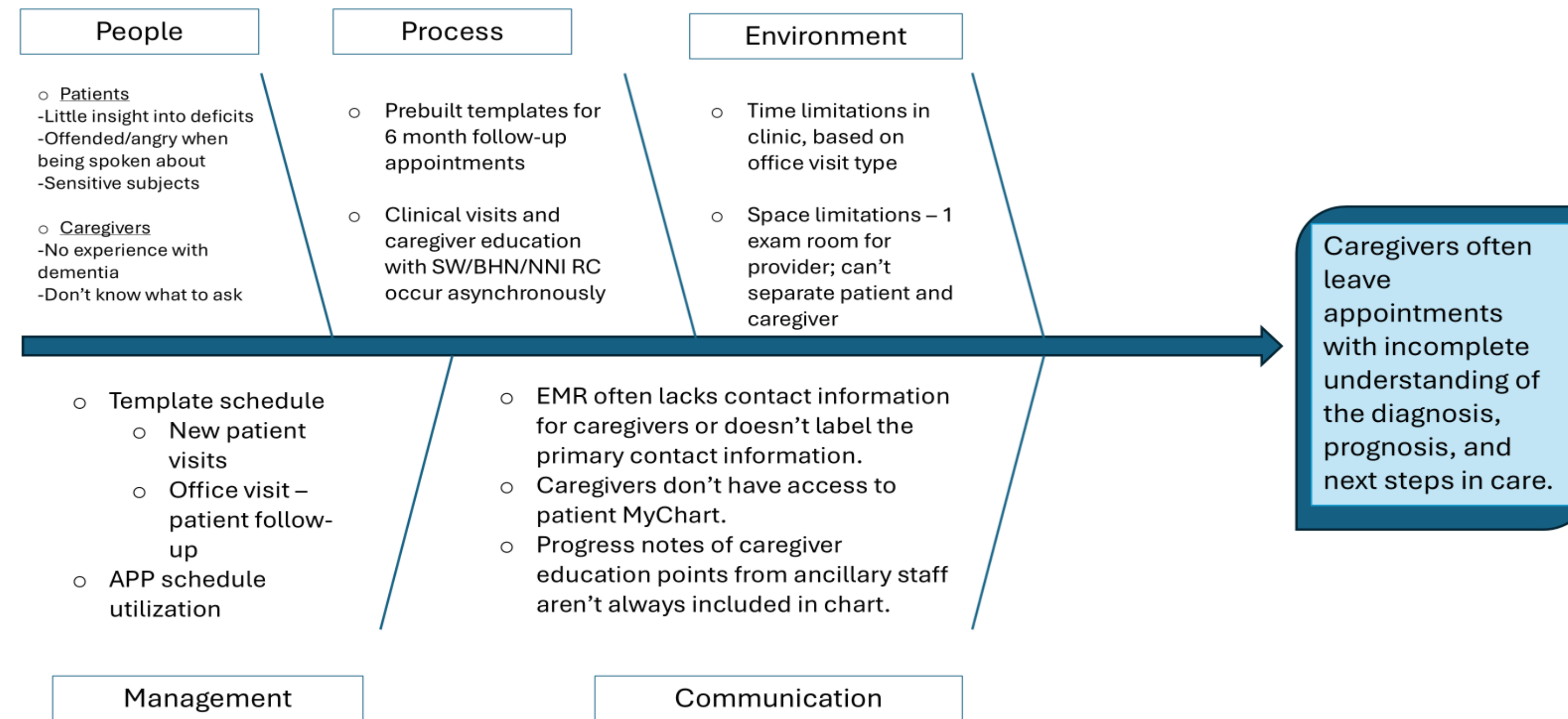


Norton Neuroscience Institute Memory Center
Norton Medical Plaza B - Downtown, Suite 301
4915 Norton Healthcare Blvd.
Louisville, KY 40204
(502) 394-6860 Phone
(502) 394-6855 Fax



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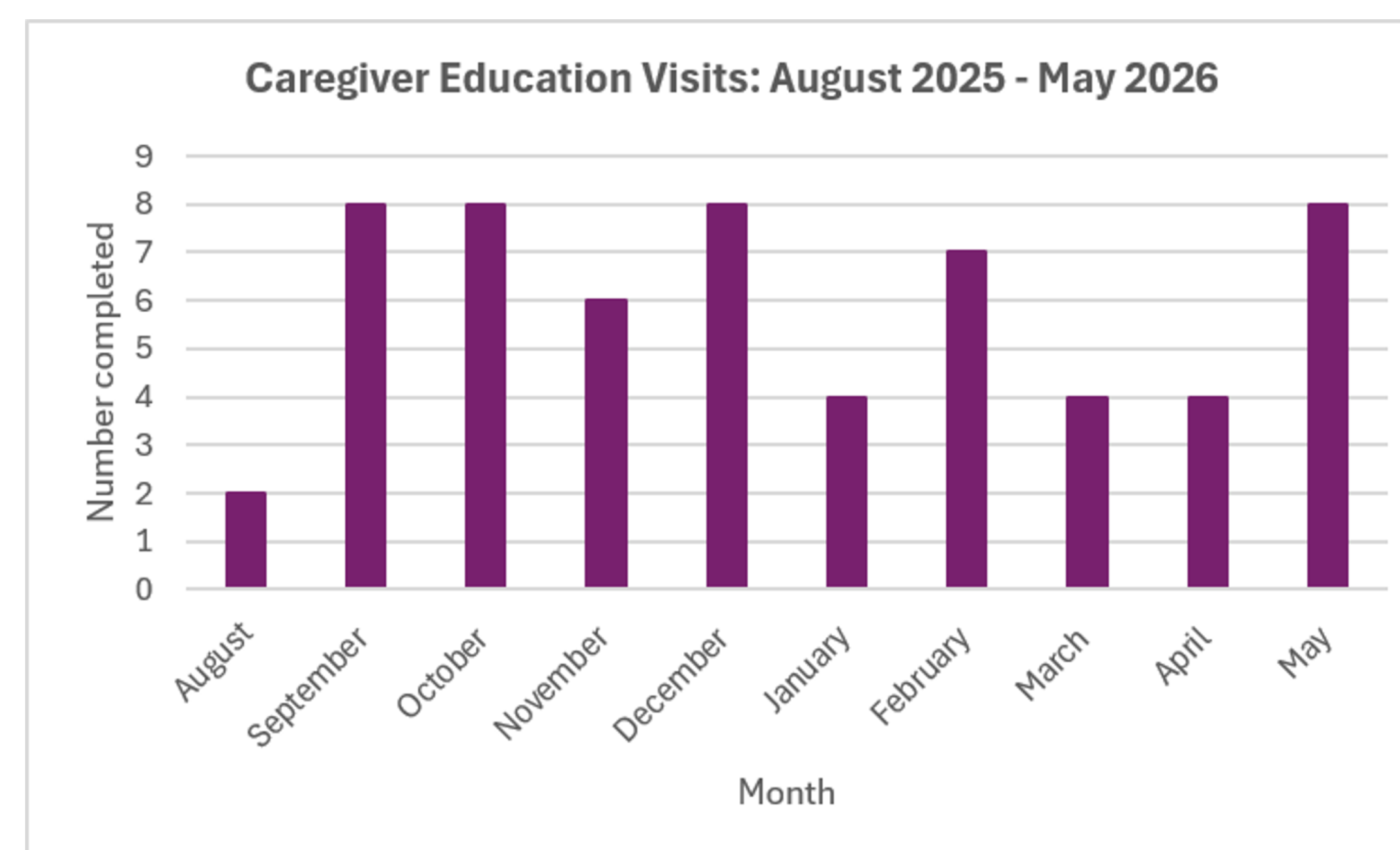
Diagnostics



PDSA Cycle

PDSA Cycle #	Plan	Do	Study	Act
#1	Research The CMS Calendar Year (CY) 2024 Medicare Physician Fee Schedule (PFS) final rule. Research requirements for caregiver education visits, note documentation, billing codes.	Create a progress note template for visit type	Determine schedule availability for APRNs to create a new visit type	Create a schedule template for new visit type "Caregiver Education Visit"
#2	Determine way to schedule -Under patient name -Update caregiver contact in EMR	Educate checkout/scheduling staff on visit type and how to schedule (under patient name) Create a patient/caregiver facing flyer about visits	Schedule utilization – are staff scheduling these visits correctly?	Educate staff (medical assistants) on visit type – how to offer to patients' caregivers and how to schedule
#3	Determine how best to communicate visit type availability to caregivers	Promote visit types to patients/caregivers -Flyer in new patient folder -Sign-ups at caregiver training workshops -Social media	How many visits are completed each month? Are visits getting reimbursed?	Re-educate staff on scheduling visits Educate social work and nurse navigator on visit type

Results



- Schedule template has been limited to 8 – 9 caregiver education visits per month
- Total of 59 caregiver education visits completed since August 2025
- Billing codes have typically been covered and reimbursed.
 - All claims through traditional Medicare were covered
 - 72% of all claims were reimbursed (no denial) through insurance

Caregiver Feedback

Education

Appreciate being able to discuss dementia with a medical professional without their loved one being present

Found clarifying the type and stage of dementia as one of the most helpful aspects of visit

Social Support

Feel comradery and validation that other caregivers are experiencing similar issues and stressors

Enjoy the in-person support rather than an online group activity

Report with Provider

Enjoy a personalized experience; the "interactive" nature of the group with the ability to ask questions about specific challenges and talk through various approaches

Numerous caregivers ask if they can come again

Lessons Learned

This is a unique visit type – scheduled under patient name and billed through patient insurance

Staff need re-education about visit type and how to schedule

Direct provider encouragement led to more caregiver education visits scheduled than a patient flyer

It is beneficial for group educator to be proficient with therapeutic group leadership skills

Smaller groups are often more beneficial for attendees (3 – 4)

Future Directions

- Determine possibility of expansion – increased visit number for schedule template vs expand providers who can complete caregiver education visits (RN, SW, etc)
- Measure the potential benefits seen by caregivers
- Add a measurement of caregiver stress (Zarit-4 Caregiver Stress Scale)
- Include a caregiver survey about experience with the caregiver education visit.

Literature Cited

CMS 2024 Physician Fee Schedule: Caregiver Training Services
<https://givershealth.com/post/cms-finalizes-caregiver-training-services-in-2024>

Pinnacle Health: 2024 Final Rule Part Three: Caregiver Training Services
<https://givershealth.com/post/cms-finalizes-caregiver-training-services-in-2024>

Billing Guide for Medicare Fee-for-Service Caregiver Training
<https://www.ccapc.org/documents/download/1281/>

