

Dear Provider,

The Orange County Healthy Aging Initiative (OCHAI), a committee of the Orange County Aging Services Collaborative (OCASC), has developed this Annual Wellness Visit (AWV) Toolkit to assist you in conducting the AWV with your Medicare patients. Below is a brief overview of the toolkit contents; **please see each section heading in the toolkit for more information about the contents**. In addition to this PDF format, all materials are individually available at <http://www.ocagingservicescollaborative.org/annual-wellness-visit-toolkit>. An overall approach to the AWV is presented on a **Process Map** in Section 1.3 and an **instructional video** on the website. These instructional aides are just suggestions; you can modify the flow of the AWV based on your practice setting.

Section 1: Introductory materials with general information about the AWV.

Section 2: Pre-Visit Materials that you may mail to the patient to help him or her prepare for the visit.

- Health Risk Assessment (HRA)
- Home safety checklist and fall risk assessment

Section 3: During Visit Assessments, such as tools for:

- Screening for depression
- Screening for fall risk
- Assessment of cognitive impairment

Section 4: Preventive Services and Plans

- Tables of clinical preventive services, counseling and vaccinations covered for Medicare beneficiaries
- Templates for personalized plans for preventive care for both men and women

Section 5: Resources and Referrals in Orange County for issues or problems identified in the HRA or during the visit.

Section 6: Patient Educational Materials that provide suggestions for healthy habits and behaviors patient's health, such as physical activity or diet, medication management, fall prevention, etc.

Section 7: Elder Abuse prevention, recognition, and reporting, including the report form that needs to be submitted if abuse is suspected.

Section 8: Other Information that may be helpful to you as a provider for older adults; specifically, information about the advance directive and some tips from experienced geriatricians.

We hope that you find the tools and information in this toolkit helpful. Please feel free to send any questions or comments about this toolkit to OCHAI@ocagingservicescollaborative.org . Thank you for taking care of our older adults!

Sincerely,

The Orange County Healthy Aging Initiative (OCHAI)
July 2017