

Dear Provider,

The Orange County Healthy Aging Initiative (OCHAI), a committee of the Orange County Aging Services Collaborative (OCASC), developed this Annual Wellness Visit (AWV) Toolkit to assist you in conducting the AWV with your Medicare patients. This third version is streamlined with more links to updated information. Below is a brief overview of the toolkit contents; **please see each section heading in the toolkit for more information about the contents** at <http://www.ocagingservicescollaborative.org/annual-wellness-visit-toolkit>. An overall approach to the AWV is presented on a **Process Map** in Tab 1 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 them prepare for the visit.

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

**Section 3: During Visit Assessments**, such as screens for:

- Depression and anxiety
- Fall risk
- Cognitive impairment
- Alcohol and substance abuse

**Section 4: Preventive Services and Plans**

- Links to information on Medicare-covered clinical preventive services, counseling and vaccinations
- 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](mailto:OCHAI@ocagingservicescollaborative.org) . Thank you for taking care of our older adults!

Sincerely,

The Orange County Healthy Aging Initiative (OCHAI)  
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