



Primary Care for Older Adults

A Functional Approach

Expanded Social HX

TEST	FREQUENCY	COMMENT & F/U OPTIONS	ICD9 CODES
Blood Pressure	Every Visit	> 139/89 ^BP w/o mention of HTN (HTN-401.9)	796.2
Pain	Every Visit	Do you have pain? Chronic/Acute?	338.29/338.19
Height	Yearly	Osteoporosis	733.00
Weight	Yearly	Obesity or weight loss	278.00/278.01/783.21
HPI	Every Visit	Self report of health, functional status and quality of life	
Medication Review	Every Visit	Eliminate unnecessary drugs including herbs	
MS: Gait/Balance	Yearly	Please stand (not using your arms). Walk 10 feet and return to chair in 10 seconds.	

Education	Once	# years education	
Work	Yearly	Do you do any paid or volunteer work?	
Children	Yearly	Do you have any children? Do they live nearby? Help you?	
Supports	Yearly	Who else is around to support you?	
Smoking	Yearly	Do you smoke? What and how often?	
Alcohol/drugs	Yearly	Are you/anyone concerned about your use of alcohol or drugs?	303.90/304.90
Abuse	Yearly	Is anyone hurting you physically, emotionally, financially?	995.80
Driving	Yearly	Do you drive? Have you had any accidents?	
Housing	Yearly	Do you live alone? Is your house in need of repair?	
Finances	Yearly	Can you afford your medications and other monthly expenses?	
Caregiving	Yearly	Do you provide care for someone else? Do you need care?	
Health Care Proxy	Yearly	Who would make decisions for you if you're unable to do so?	
Advanced Directives	Yearly		

Expanded ROS (think function)

Skin	Yearly	Do you have any itching, rashes or lesions?	698.9/782.1/709.9
HEENT: Hearing Screening	Yearly	Do you have trouble hearing my voice? Hearing in a conversation?	389.9
Vision Screening	Yearly	Can you see the clock on the wall? See numbers on the phone?	369.9
Nutrition	Yearly	Do you eat at least two meals a day?	783.21/783.7
Dentition	Yearly	Do you have mouth pain? Trouble chewing? Trouble swallowing?	528.9/787.2
GI: Constipation, Incontinence	Yearly	Do you have trouble moving your bowels? Leak? Soil underwear?	564.0/787.6
GU: Urinary Incontinence	Yearly	Do you lose urine? Have accidents? Leak? Wear pads?	788.30
MS: Falls (Gait Instability)	Yearly	Have you fallen recently? Do you use assistive devices?	781.2/V15.88
Physical Activity	Yearly	What is your activity level? Do you feel fit?	
Neuro: Memory	Yearly	Have you or your family noticed problems with your memory?	290.0/438.0
*Psych: Depression	Yearly	Do you ever feel sad, blue, down in the dumps, depressed?	311
Sleep	Every Visit	Do you have trouble sleeping?	780.52
EXT: Podiatry	Yearly	Do you have foot problems? Pain? Plantar Fasistis?	719.47/728.71
Sexual Activity	Yearly	Are you sexually active? If yes, do you practice safe sex? Do you have sex with men, women or both?	

Vaccines

Flu	Yearly	Have you had a flu shot this year?	V04.81
Pneumonia	65+: one time <65: repeat	Were you ever vaccinated for pneumonia? When?	V03.82
Tetanus	Every 10 Years	When was the last time you had a tetanus shot?	

Lab/Other Tests

PSA	Controversial	For prostate cancer.	V76.44
Stool Blood Test	Controversial	Fecal occult blood (GO328, 82270, 82272)	
Cholesterol	Every 5 Years	If normal. More frequently in high risk patients (CAD, DM, Stroke)	V77.91
*Fasting Blood Sugar	Yearly	For diabetes.	V77.1
Thyroid Test (TSH)	Yearly	If normal.	V77.0
25-OH Vitamin D	Every 2 years	Vitamin D deficiency. Replete if level < 25 .	268.9
HIV Testing	As Needed	If high risk due to sex and/or drugs. (exposure to)	V01.79
EKG	At first visit	Baseline for future comparison. (Q0091)	
*PAP Test	Every 3 years	Consider stopping after age 65 if low risk (single partner or sexually inactive, good prior screening, no hx abnormal Pap smear)	V76.2
*Vision Exam	Yearly	For glaucoma, macular degeneration, cataracts. (GO117, G0118)	V80.1
Colonoscopy	Every 10 Years	For colon cancer. (not high risk) (GO121)	V76.51
*Bone Density Exam	At Least Once	For osteoporosis.	V82.81
*Mammogram	Every 1-2 Years	To age 70 and continued in women >70 who have reasonable life expectancy. (GO202, 77052, 77057)	V76.11/V76.12
Oral/Dental Exam	Yearly	For endocarditis, heart disease, diabetes, stroke, oral cancer screening.	V72.2



- ◆ For any non-medical issues which arise, contact **Boston ElderINFO 617-292-6211**, info@elderinfo.org, www.elderinfo.org.
- ◆ The term frequency indicates how often a particular test or question should be used with a patient.
- ◆ The tests and questions are prompts, which may uncover undiagnosed conditions.
- ◆ The ICD9 codes are provided to allow the diagnosis to be a billable service under Medicare.

Boston ElderINFO is a telephone helpline for Seniors, Caregivers and Health Professionals. BEI provides information on: Home Care, Housing, Government Benefits, Medications, Day Care, Shopping, Meals, Transportation, Health Insurance, Gay/Lesbian resources and many more services. BEI offers FREE Consultation, FREE Referrals, FREE Eldercare guide and FREE Bilingual Services.

Boston ElderINFO (BEI) helps elders as well as their families, caregivers and professionals to understand and to access all services that can assist an elder in continuing to live safely and independently. BEI is a program of the ElderCare Alliance which is a not-for-profit collaboration of the three Boston Home Care Agencies: Boston Senior Home Care, Central Boston Elder Services and Ethos.

The Boston Partnership for Older Adults (BPOA) includes over 200 organizations and individuals. We work with community-based organizations that serve older adults to improve systemic infrastructure and service coordination.

The Functional Assessment Tool was designed by the BPOA's Health Committee. The Health Committee promotes a standard of quality geriatric care that is easily integrated into the daily practice of non-geriatrician primary care practitioners. The Health Committee is comprised of geriatricians, practice managers, nurses, social workers and other human service professionals from major medical institutions, including Boston Medical Center, Massachusetts General Hospital, Beth Israel Deaconess Medical Center, and Brigham and Women's Hospital, as well as from community health centers, private practice, and a number of community-based social service agencies.

For Community Resources contact:

Boston ElderINFO 617-292-6211, info@elderinfo.org, www.elderinfo.org.

For more information about this tool or to download additional copies of the tool or corresponding patient survey, contact: Boston Partnership for Older Adults, 617-426-5124, info@bostonolderadults.org, or visit www.bostonolderadults.org.