

Demographics

1. What is your Name? _____
2. What is your Date of Birth? _____
3. What is today's date? _____
4. What is your Age?
 - a. ☐ 18-64
 - b. ☐ 65-69
 - c. ☐ 70-79
 - d. ☐ 80 or older
5. How new are you to Medicare?
 - a. ☐ This is my first year (12 months) of Medicare
 - b. ☐ This is my second year of Medicare
 - c. ☐ I've been on Medicare for more than 2 years
 - d. ☐ I have a Medicare Advantage plan
6. What is your Gender?
 - a. ☐ Male
 - b. ☐ Female
 - c. ☐ Other
7. What is your Race?
 - a. ☐ White
 - b. ☐ American Indian or Alaskan Native
 - c. ☐ Asian
 - d. ☐ Black or African American
 - e. ☐ Hispanic or Latino
 - f. ☐ Native Hawaiian or Other Pacific Islander
 - g. ☐ Other
8. What is your Ethnicity?
 - a. ☐ Hispanic or Latino
 - b. ☐ Not Hispanic or Latino
 - c. ☐ Other
9. What is your preferred language?
 - a. ☐ English
 - b. ☐ Spanish
 - c. ☐ Other: _____

General

10. _During the past 4 weeks, how would you rate your **health in general**?
 - a. ☐ Excellent
 - b. ☐ Very good
 - c. ☐ Good
 - d. ☐ Fair
 - e. ☐ Poor
11. _**How have things been going for you** during the past 4 weeks?
 - a. ☐ Very well - could hardly be better
 - b. ☐ Pretty good
 - c. ☐ Good and bad parts about equal
 - d. ☐ Pretty bad
 - e. ☐ Very bad - could hardly be worse

Pain

12. _During the past 4 weeks, how much **bodily pain** have you generally had?
 - a. ☐ No pain
 - b. ☐ Very mild pain
 - c. ☐ Mild pain
 - d. ☐ Moderate pain
 - e. ☐ Severe pain
13. _How often do you use **pain medication**?
 - a. ☐ I need pain medication all the time
 - b. ☐ Everyday
 - c. ☐ Most days or nights
 - d. ☐ Sometimes
 - e. ☐ Almost Never
 - f. ☐ Never
14. _Do you or your family members have any concerns about your memory?
 - a. ☐ Yes
 - b. ☐ No

Name: _____ Date of Birth: _____

Tobacco/Alcohol/Exercise

15. Do you use **tobacco or vaping**?
- ☐ No/never
 - ☐ Former
 - ☐ Yes
16. Do you **drink alcohol**?
- ☐ No
 - ☐ Former
 - ☐ Yes
17. What type of alcohol? (check all that apply)
- ☐ Beer
 - ☐ Liquor (gin, rum, scotch, whiskey, etc.)
 - ☐ Wine
18. How often do you drink alcohol?
- ☐ Daily
 - ☐ Weekly
 - ☐ Monthly
 - ☐ Yearly
 - ☐ Occasionally
 - ☐ Rarely
 - ☐ Socially
19. How many **days of moderate to strenuous exercise**, like a brisk walk, did you do in the last 7 days?
- _____ days last week
20. On the days that you engage in moderate to strenuous exercise, like a brisk walk, **how many minutes, on average, do you exercise?**
- _____ minutes on average

Social Determinants of Health

21. How hard is it for you to **pay for the very basics** like food, medical care, and heating?
- ☐ Very hard
 - ☐ Hard
 - ☐ Somewhat hard
 - ☐ Not very hard
22. Do you feel **stressed** (tense, nervous, anxious, unable to sleep at night) over the **last 4 weeks**?
- ☐ Not at all
 - ☐ Only a little
 - ☐ To some extent
 - ☐ Rather much
 - ☐ Very much

23. Over the last 2 weeks, **how often have been bothered** by having little interest or pleasure in doing things?
- ☐ Not at all
 - ☐ Several days
 - ☐ More than half the days
 - ☐ Nearly every day
24. Over the last 2 weeks, **how often have you been bothered** by feeling down, depressed, or hopeless?
- ☐ Not at all
 - ☐ Several days
 - ☐ More than half the days
 - ☐ Nearly every day
25. What is your current **marital status**?
- ☐ Married
 - ☐ Widowed
 - ☐ Divorced
 - ☐ Separated
 - ☐ Never married (Single)
 - ☐ Living with partner
26. In a typical week, how many times do you **talk on the telephone** with family, friends, or neighbors?
- _____ times/week
27. In a typical week, how often do you **get together** with friends or relatives?
- _____ times/week
28. How often do you attend religious services?
- _____ times/week
29. Do you belong to any **clubs or organizations**, such as unions, fraternal, athletic, or school groups?
- ☐ Yes
 - ☐ Yes, but I rarely participate
 - ☐ No
30. Do you **feel safe** in your home?
- ☐ Yes
 - ☐ No
 - ☐ Prefer to discuss in person

Name: _____ Date of Birth: _____

Functional Ability/Safety/Home Environment

31. _Does your home have throw rugs, poor lighting, or a slippery bathtub/shower?
- a. ☐ Yes
- b. ☐ No
32. _Does your home have adequate grab bars in bathrooms, handrails on stairs and steps?
- a. ☐ Yes
- b. ☐ No
33. How many **falls** have you had in the **last year**?
- a. _____ in the last year
34. Did the fall(s) **result in injury**?
- a. ☐ No falls
- b. ☐ No injuries
- c. ☐ Yes, I was injured
35. Do you have **smoke detectors** in your home?
- a. ☐ Yes
- b. ☐ No
36. Do you have **firearms** in your home?
- a. ☐ Yes
- b. ☐ No
37. Do you **always fasten your seat belt** when in a car?
- a. ☐ Yes, usually
- b. ☐ Yes, sometimes
- c. ☐ No
38. Do you have **carbon monoxide detectors** at home?
- a. ☐ Yes
- b. ☐ No
39. _Do you require help with daily activities?
(Check all that apply)
- a. ☐ I need help shopping for groceries
- b. ☐ I need help bathing
- c. ☐ I need help getting dressed
- d. ☐ I need help preparing meals
- e. ☐ I have trouble eating or with my teeth
- f. ☐ I need help going to the toilet
- g. ☐ I need help with housework/laundry
- h. ☐ I need help handling money/finances
- i. ☐ I need help keeping track of my medications
- j. ☐ I need help managing my health problems
- k. ☐ I have sexual problems
- l. ☐ I have difficulty driving my car
- m. ☐ I have trouble getting transportation
- n. ☐ I don't need additional help

Functional Limitations

40. How hard is it to **get in and out of cars**?
- a. ☐ No problem
- b. ☐ Difficult
- c. ☐ Unable to
41. How hard is it to go **up or down stairs**?
- a. ☐ No problem
- b. ☐ Difficult
- c. ☐ Unable to
42. How hard is it to **kneel**?
- a. ☐ No problem
- b. ☐ Difficult
- c. ☐ Unable to
43. How hard is it to **put on socks and shoes**?
- a. ☐ No problem
- b. ☐ Difficult, I need help
- c. ☐ Unable to
44. How far can you comfortably **walk without a rest**?
- a. ☐ Not able to
- b. ☐ Short distances
- c. ☐ 1 to 4 blocks
- d. ☐ 5 to 10 blocks
- e. ☐ 10 or more blocks
- f. ☐ I don't know

Hearing

45. Do you have **trouble hearing the television or radio** when others do not?
- a. ☐ Yes
- b. ☐ No
46. Do you have to **strain or struggle to hear/understand** conversations?
- a. ☐ Yes
- b. ☐ No

Medication Reconciliation

47. How often do you have **trouble taking medicines** the way you have been told to take them?
- a. ☐ I do not have to take medicine
- b. ☐ I always take them as prescribed
- c. ☐ Sometimes I take them as prescribed
- d. ☐ I seldom take them as prescribed

Instead of listing every medication you are taking, just bring your medication bottles to your appointment.

Name: _____ Date of Birth: _____

Advance Directives

48. Do you have any of these **documents**:

(please bring a copy to your appointment)

- a. ☐ Healthcare Power of Attorney
- b. ☐ Will
- c. ☐ Living Will

What to bring to your appointment:

- 1. This packet, filled out
- 2. If you have a Healthcare Power of Attorney, Will or Living Will
- 3. Your medication bottles with labels



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608-643-3351

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Care Team (Healthcare Providers):

Provider	Name & Last Seen
Cardiologist	
Dermatologist	
Ear, Nose, Throat (ENT)	
Endocrinologist	
Gastroenterologist	
Oncologist	
Optometrist	
Ophthalmologist	
Orthopedist	
Physical Therapy	
Pulmonologist	
Podiatrist	
Psychiatrist/ Psychologist	
Rheumatologist	
Urologist	