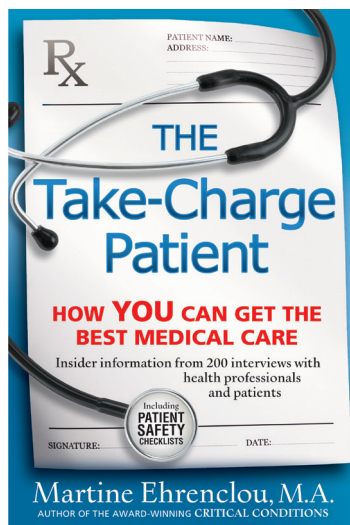


The Take-Charge Patient's Toolkit

To Help YOU Get
the Best Medical Care

Martine Ehrenclou, M.A.

A workbook for *The Take-Charge Patient*



Dear Fellow Patient,

Taking charge of YOU as a patient is essential in today's complex health care system. The more informed you are about all aspects of your medical care, the more the quality of care you receive will improve. If you actively participate in your care, you will experience better care, increased patient safety, increased patient satisfaction and more.

I wrote my award-winning book, *The Take-Charge Patient*, so you can learn how to be empowered and engaged as a patient, to have your voice heard, share in medical decisions about you, communicate effectively with medical providers, choose the best doctors for you, prevent medical errors, and more. This is about becoming your own best advocate. *The Take-Charge Patient's Toolkit* contains questions, checklists and forms to help you become a take-charge patient, so you can control what you can and feel more confident. If you insert your information into the Health Summary, Health History, and Medical ID Card, and prepare questions before your medical appointments, you'll not only feel more confident to converse with your doctors, but you'll prevent medical errors as well.

Your health care is a team sport, a partnership with your medical provider so you receive the best care possible.

Use these forms, questions and checklists as companion pieces with my book, *The Take-Charge Patient*, or simply as quick-and-easy aids to help you along the way.

There is more to learn about being your own best advocate. For more information about *The Take-Charge Patient*, please visit www.thetakechargepatient.com

Warm regards,

Martine Ehrenclou

Author, Patient Advocate and Patient

HOW TO USE THE TAKE-CHARGE PATIENT'S TOOLKIT

This toolkit includes several forms with checklists to help guide you through key points in your medical care. Fill them out before your next medical appointment either with your current medical provider or a new doctor or specialist. Take them with you and check the forms as your office visit proceeds.

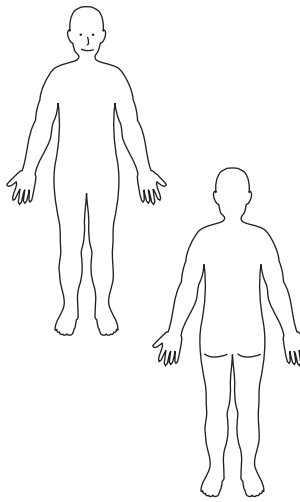
You may make copies as often as you need them. They are just a beginning—reading *The Take-Charge Patient: How You Can Get the Best Medical Care* will provide you with much more information and more forms.

HEALTH SUMMARY

Complete this form before you see a doctor about a medical problem.
Take it with you to the office visit.

Full name		Date of birth
Home phone	Cell phone	
Physician's name and contact information	Emergency contact person and contact info	

REASON FOR THIS VISIT	Today's date ___/___/___
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<p>My top 5 questions for the doctor:</p> <ol style="list-style-type: none"> 1. 2. 3. 4. 5. 	
<p>Describe your symptoms. If you wish, use the diagrams at right to show where they are located.</p>	

When did the symptoms start?	How often are they present?
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What makes them worse or better?	If there is pain, how severe is it on a scale of 1 to 10, with 1 being no pain?
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If you have had these symptoms before, how were they treated and how successful was the treatment?

HEALTH HISTORY

Complete this form and keep it in your health file at home. Take a copy with you to new medical providers.

Full name		Date of birth
Home phone		Cell phone
Physician's name and contact information		Emergency contact person and contact info

MAJOR SURGERIES

Date	Description	Surgeon's name/contact information
Date	Description	Surgeon's name/contact information
Date	Description	Surgeon's name/contact information

SIGNIFICANT PROCEDURES AND TESTS

Date	Description	Doctor's name/contact information
	Results	
Date	Description	Doctor's name/contact information
	Results	
Date	Description	Doctor's name/contact information
	Results	

MEDICAL CONDITIONS AND ILLNESSES

Date of onset	Description	Treatment and results
Date of onset	Description	Treatment and results
Date of onset	Description	Treatment and results

QUESTIONS TO ASK BEFORE YOU SELECT A NEW DOCTOR

- Does the doctor take my health insurance?
- Is the doctor board certified in her specialty?
- Is the doctor affiliated with the hospital of my choice?
- How long does it usually take to get a routine appointment?
- How long does it take to get a sick appointment?
- How much time does the doctor usually spend with a patient?
- Is the doctor's office open when I am available to go? Ask about evening or Saturday appointments.
- Does the doctor's practice use a website for appointments, education or advice?
- Does the doctor have a nurse practitioner or physician's assistant?

QUESTIONS TO ASK YOURSELF ABOUT YOUR SYMPTOMS

- When did I first begin experiencing symptoms?
- When do I most notice the symptoms?
- How severe are my symptoms?
- Does anything make the symptoms worse or better?
- Have my symptoms changed over time?
- Where on or in my body are the symptoms located?
- Is there pain related to my symptoms?
- Were the symptoms or pain first triggered by a physical event?
- What have I tried to alleviate the symptoms?
- What do I think is causing my symptoms or associated pain?

QUESTIONS TO ASK YOUR DOCTOR ABOUT YOUR DIAGNOSIS AND TREATMENT PLAN

- What is my diagnosis?
- Where can I find information about my diagnosis? Do you have information you can give me?
- Are there any other possible diagnoses for my condition?
- What is my treatment plan?
- (If you aren't confident or comfortable with the proposed treatment plan, ask the following:)
Are there alternatives to this treatment plan?
- How long do you think it will take for me to recover?
- Are there tests and procedures I need to have done?
- What changes do I need to make to support my recovery?
- Do I need another appointment with you?

Ask yourself, do I feel comfortable with my diagnosis and treatment plan, or do I need a second opinion?

QUESTIONS TO ASK ABOUT MEDICATIONS

- What is the name of the medication you prescribed for me? (Ask for both brand and generic names.)
- Does it matter whether I take the brand-name or generic version of this medication?
- What is the dosage and how many times a day do I need to take it?
- How long will I be on the medication?
- Why am I taking this medication?
- Do I need to take this medication with or without food or at any particular time of day?
- Are there any side effects to this medication?
- Can this medication interact with any of my other medications?

QUESTIONS TO ASK YOUR DOCTOR ABOUT TESTS AND PROCEDURES

- Do I need to get copies of test results or reports from other doctors such as blood work, MRI, CT scan? (If so, keep a copy for yourself and get one for your medical provider. Keep your copy in your health file at home. You never know when you may need it.)
- What is the procedure or test that you are recommending?
- What are you looking for with this procedure or test?
- How long will it take?
- Do I have to prepare for this procedure/test?
- What are the risks and benefits to this test?
- Are there any side effects?
- Is this test covered by my health insurance?
- Will I be able to drive home after this test or procedure?
- Do I need to have someone drive me to the test or procedure?
- Will I be able to go back to work right after the test or procedure?
- Will there be pain or discomfort with the test the test or procedure?

Ask yourself, do I feel comfortable with having this test or procedure or do I need a second opinion?

QUESTIONS TO ASK YOUR DOCTOR ABOUT A SURGERY

- What is the surgery you want to perform?
- Is your fee covered by my health insurance?
- Is the hospital or surgery center covered by my health insurance?
- Is the anesthesiologist's fee covered by my health insurance?
- Do you have informational materials you can give me about this type of surgery?
- How many of these surgeries have you performed?
- What will the surgery do for me? What would happen if I didn't go through with this surgery?
- What are the risks to this type of surgery?
- Will the surgery be performed in the hospital or in a surgery center?
- What will my recovery be like? Please describe my after-care.
- Will I be in pain after the surgery?
- Will I need someone to help with my care after the surgery?

Ask yourself, do I feel comfortable with having this surgery or do I need a second opinion?

QUESTIONS TO ANSWER AFTER A VISIT WITH MY MEDICAL PROVIDER

- Did I feel comfortable with my medical provider? If not, list reasons.

- Did I get all of my questions answered? If not, list here.

- Do I need more information about what my medical provider shared with me? List here.
What is my plan if I need more information? Do research? Call the doctor?

- What do I need to do now? Example: new treatment plan, modify current treatment plan, have a test or procedure or surgery etc..

QUESTIONS TO ASK YOUR HEALTH INSURANCE PROVIDER

- Do I have a co-pay? If so, how much is it?
- What is my deductible?
- What is my premium?
- Do I have co-insurance?
- Which medical providers does my insurance plan allow me to see?
- Which hospitals, clinics or surgery centers does my insurance plan allow me to use?
- Am I currently seeing in-network providers? If not, how much will an out-of-network provider cost? Will my health insurance plan pay anything if I see a doctor who does not take insurance?
- Does my plan cover my specific needs such as specialist, vision care, maternity, dental, chemotherapy and more?
- Does my plan cover prescription medications?
- Does my health insurance cover nurse practitioners and physician's assistants?
- Does my plan cover acupuncture, physical therapy and other therapies?
- Does my plan cover me if I travel outside of the United States?
- If I have primary and secondary insurance, do I understand what each one covers?

MY MEDICATION SAFETY CHECKLIST

- What is the name and dosage of the medication my medical provider prescribed?
- Why am I taking this medication?
- How do I take this medication? For example, with food, without food, time of day.
- What are the brand and generic names of this medication? (This is so you can match it to the medication you receive from your pharmacy.)
- Did I review the prescription in the doctor's office?
- Did I look at the medication I received from my pharmacy? Check who it is for. Check the medication itself—do you recognize it? If not, call your pharmacy to make sure it's correct.
- Do I need to set up an appointment to meet with my pharmacist?
- Do I need help managing my medications?
- Have I explored my options to get help to manage my medications? If not, ask your pharmacist for assistance.
- Have I created a list of all my medications?
- Have I considered using only one pharmacy?
- Do I need to set up timers to alert me to take my medications?
- Have I provided a list of my medication allergies to my physicians, other medical professionals and pharmacist?

PATIENT SAFETY CHECKLIST

- Am I prepared for each doctor/medical provider with copies of pertinent copies of test results, health summary, list of current medications, list of symptoms, questions for my medical provider, and top three medical concerns? Do I have a list of questions?
- Did I research my diagnosis?
- Did I ask my doctor if there could be other possible diagnoses?
- Do I know my family medical history such as medical conditions or diseases my parents or siblings have? Have I shared this information with my medical provider?
- Did I create my own list of medications and their dosages, over-the-counter medications, herbs and supplements and shared that list with each medical provider I see?
- Did I follow up on my test results?
- Did I ask what my test results mean?
- Did I ask for my tests to be repeated?
- Have I enlisted support from loved ones?
- Do I need an advocate?
- Do I need a second opinion from a doctor who is affiliated with a respected medical school?

YOUR MEDICAL ID CARD

Your medical ID card is one of the most important tools in your toolkit.

As a take-charge patient, you must create a medical ID card.

Print this card, cut it out, fill it out, and carry it with you at all times.

Create a new one whenever there are changes. Medical apps for your information are great, but you need this as a backup in case your medical app or smartphone cannot be found.

Your medical ID card should contain the following information:

- Your full name.
- Your primary care physician's name and contact information or the name of any other medical professional who manages your care. This is the person you see the most for your primary care.
- Your current medical conditions, medications and their dosages, over-the-counter medications, including herbs and supplements, and allergies to medications.
- Emergency contact names and phone numbers. List the person you want to be called if you have a medical emergency.

MEDICAL INFORMATION

Patient Name: _____

Home Address: _____

PCP: _____

Other Specialists Currently Seeing:

Current Medications: _____

Allergies to Medications: _____

Current Medical Conditions: _____

Current Diagnoses: _____

Emergency Contacts: _____

Spouse or Partner: _____

Friend or Family Member:

Caregiver if Applicable:

Preferred Hospital: _____

Health Insurance: _____

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RESOURCES FOR THE TAKE-CHARGE PATIENT

*You can research your hospital or physician on credible websites to find out information about them.
You can also look up your medical condition, disease or treatment plan. Get informed!*

Hospitals

American Hospital Association

<http://www.aha.gov/>

Consumer Reports Hospital Ratings (subscription required)

<http://www.consumerreports.org/health/doctors-hospitals/doctorsand-hospitals.htm>

HealthGrades

<http://www.healthgrades.com/>

Hospital Compare

U.S. Department of Health and Human Services

<http://www.hospitalcompare.hhs.gov/>

The Joint Commission

<http://www.jointcommission.org/>

The LeapFrog Group

<http://www.leapfroggroup.org/cp>

Physicians

HealthGrades

<http://www.healthgrades.com>

American Board of Medical Specialties (See if your doctor is board certified)

www.abms.org

Federation of State Licensing Boards (See if the doctor is licensed in your state)

<http://www.fsmb.org>

AIM

<http://www.docboard.org/aim/>

Research Your Illness/Condition and Treatment Plan

(These are just a few of the available resources)

The Cochrane Library

<http://www.thecochranelibrary.com/view/0/index.html>

Ask Me 3

<http://www.npsf.org/for-healthcare-professionals/programs/ask-me-3/>

Up To Date

<http://www.uptodate.com/patients/index.html>

Cleveland Clinic

<http://my.clevelandclinic.org/default.aspx>

The Mayo Clinic

<http://www.mayoclinic.com/>

MD Anderson Cancer Center in Houston, Texas

<http://www.mdanderson.org/>

Memorial Sloan-Kettering Cancer Center

http://www.mskcc.org/mskcc/html/44.cfm_

AHRQ, Agency for Healthcare Research and Quality

<http://www.ahrq.gov/>

Centers for Disease Control and Prevention

<http://www.cdc.gov/>

Medline Plus

<http://www.nlm.nih.gov/medlineplus/>

National Institutes of Health

<http://nih.gov/>

American Cancer Society

<http://www.cancer.org/>

American Diabetes Association

<http://www.diabetes.org/>

American Heart Association

<http://www.heart.org/>

Consumer Reports

http://www.consumerreports.org/health/prescription_drugs/index.htm

Drugs.Com

<http://www.drugs.com/>

Epocrates

<http://www.epocrates.com/>