
The Take-Charge Patient's Toolkit

To Help YOU Get
the Best Medical Care

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Dear Reader,

Taking charge of yourself as a patient is essential in order for your doctors and other medical professionals to serve you in the way they know best. I wrote *The Take-Charge Patient* to teach people to organize and understand their own medical records, to prepare for medical appointments, and to advocate for themselves in order to obtain the most appropriate and expedient medical care.

This *Patient Toolkit* contains forms and questions you'll need to start being a take-charge patient. If you keep the Health Summary, Health History, and Medical ID Card current, you won't have to scramble to gather information if you aren't feeling well or are pressed for time. If you carefully study the checklists and questions, you won't forget to talk to your doctor about something important.

Although medical history apps are available online and for smartphones, they're not foolproof, and not everyone knows how to use them; you'll want to have medical information on paper to take along to medical appointments as well as a list of questions for your doctor.

Your health care is a team sport. If you are proactive, involved and organized you'll find that you can maximize the quality of your care as well as gain more respect from your medical providers.

There's much more to learn about advocating for yourself. For more information about *The Take-Charge Patient*, please visit www.thetakechargepatient.com.

Martine Ehrenclou

Author of *The Take-Charge 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

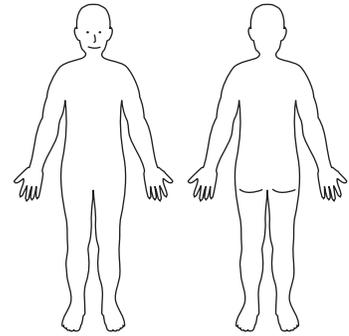
Complete this form before you see a doctor about a medical problem.
Take it with you to the office visit.

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 __/__/__

Describe your symptoms.
If you wish, use the diagrams at right to show where they are located.



When did the symptoms start?

How often are they present?

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?

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 with your medical records. Take it with you to medical appointments.

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

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.

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: _____

→ _____ ← Fold here

Emergency Contacts: _____

Spouse or Partner: _____

Friend or Family Member:

Caregiver if Applicable:

Preferred Hospital: _____

Health Insurance: _____

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?
- How long do you want me to take this medication?
- Can this medication interact with any of my other medications?

MEDICATION SAFETY CHECKLIST

- Do I know the name and dosage of the medication my doctor prescribed?
- Do I understand why I am taking this medication?
- Do I understand how to take this medication?
- Do I know the brand and generic names of this medication?
- Did I review the prescription in the doctor's office?
- Did I look at the medication at the pharmacy?
- 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?
- 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?

QUESTIONS TO ANSWER BEFORE YOU SEE YOUR DOCTOR

- Has something changed since my last visit?
- When did it change?
- How long has it been this way?
- Do I have new symptoms since my last visit?
- Has my medication changed since my last visit?
- Have I seen another doctor since my last visit, and if so, do I have a copy of my medical record from that visit?
- Did I have a test or procedure? If so, did I bring a copy of the results?

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 BEFORE YOU SELECT A NEW DOCTOR

- Does the doctor take my health insurance or Medicare, etc.?
- Is the doctor board certified in her specialty?
- Is the doctor affiliated with the hospital of my choice?
- How many patients does the doctor see in a day?
- How long do patients have to wait in the waiting room before their appointments?
- How long does it usually take to get a routine appointment?
- How long does it take to get a sick appointment?
- Will the doctor fit me in if I really need to see her?
- How much time does the doctor usually spend with a patient?
- If you are interested in alternative medicine treatments, ask if the doctor is involved with or open to alternative medicine.
- Is the doctor's practice affiliated with an urgent care center?
- Is the office wheelchair accessible?
- 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 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?
- What tests and procedures do I need to have done?
- Are there alternatives to tests and procedures?
- 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 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 insurance?
- Do you have informational materials you can give me about this type of surgery?
- How many of these surgeries have you performed?
- Would you mind if I talk to one or two of your other patients who had this surgery?
- What will the surgery do for me? What would happen if I didn't go through with this surgery?
- What happens if the surgery is not successful?
- 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 ASK YOUR DOCTOR ABOUT TESTS AND PROCEDURES

- What is the procedure/test?
- What are you looking for?
- 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?
- Do I need to have someone drive me to the test?
- Will I be able to go back to work right after?
- Will there be pain or discomfort with the test?
- When can I get the results of the test?

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

QUESTIONS TO ASK YOUR HEALTH INSURANCE PROVIDER

- What is my co-pay?
- What is my deductible?
- 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 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 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?

PATIENT SAFETY CHECKLIST

- Am I prepared for each doctor with copies of pertinent medical records, health summary, list of medications, list of symptoms, etc.?
- 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 history?
- Do I need to get a second opinion?
- 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?
- Do I need to find a doctor affiliated with a highly respected medical school?
- Have I enlisted support from loved ones?
- Do I need an advocate?

RESOURCES FOR THE TAKE-CHARGE PATIENT

You can research your hospital and physician on credible websites to find out information about them.

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

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/>