

# QuRE Patient & Caregiver Journal

Health Resources to Use for Doctor's Appointments,  
Consultations & Referrals

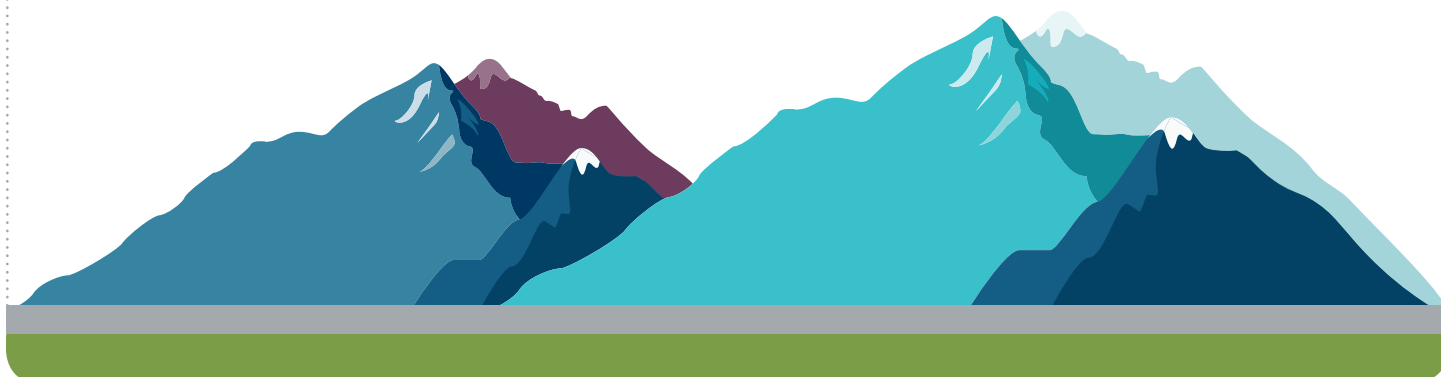


**This Journal Belongs To:**

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This QuRE Patient & Caregiver Journal was originally published in July 2020.  
Please refer to [ahs.ca/QuRE](https://ahs.ca/QuRE) for the latest version of this Journal.



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# Welcome

Navigating our healthcare system can be overwhelming, especially if it is new to you, but Quality Referral Evolution (QuRE) is here to help!

QuRE (which rhymes with cure) is a joint project between Alberta Health Services (AHS), the University of Calgary, the University of Alberta and Primary Care Networks (PCNs) across the province. We work with primary care providers, specialists, patient advisors and communities to give clear referral and consultation information to physicians, clinic staff, patients, caregivers and families.

If you or a family member has a health concern, you can talk to your primary care provider about it. If your provider needs advice from another provider who specializes in your concern, you may be referred to see a specialist. QuRE works to improve referral and consultation communication by supporting providers and their staff to give accurate and complete information about you and ensures you are well informed about your care process. For more information about QuRE, go online to: [ahs.ca/QuRE](https://ahs.ca/QuRE)

## How to Use this Journal

This Journal will help guide you through the referral and consultation process. It prompts you to ask important questions when meeting with healthcare providers, track appointments and highlight key health information. We encourage you to take it to your appointments and keep it close by when you need support.



## Questions or Concerns About Your Health?

If you have a concern or feedback about the healthcare services or other support services you or a family member has received at an AHS facility, you can share your thoughts with AHS Patient Relations. Visit [ahs.ca/about/patientfeedback.aspx](https://ahs.ca/about/patientfeedback.aspx) for more information.

Standards of professional behaviour and ethical conduct for physicians are set by the College of Physicians & Surgeons of Alberta. For more information or to discuss a concern, go online to: [cpsa.ca](https://cpsa.ca)

# Important Contact Numbers



For life-threatening emergencies, call 9-1-1 or go directly to your nearest emergency department



For 24/7 health advice from a registered nurse, call Health Link by dialing 8-1-1

## Addiction Services Helpline

**1-866-332-2322**

24/7 advice for gambling problems, alcohol, tobacco & other drugs.

## Alberta 211

**2-1-1 or text: INFO to 211**

24/7 service that connects you to community and social services in your area.

## AlbertaQuits Helpline

**1-866-710-7848** (8 a.m. - 8 p.m.)

**Text: ABQUITS to 123456**

Advice on quitting tobacco use.

## Bullying Helpline

**1-888-456-2323**

24/7 advice or support on bullying.

## Child Abuse Hotline

**1-800-387-5437**

24/7 service if you think a child is being abused or neglected by a parent or guardian.

## Dementia Advice

**8-1-1**

24/7 support for people living with dementia and their caregivers.

## Family Violence Info Line

**310-1818**

24/7 service if you (or someone you know) are going through family violence or abuse.

## First Nations and Inuit Hope for Wellness Helpline

**1-855-242-3310**

24/7 support services for Indigenous peoples across Canada.

## Income Support Contact Centre

**1-866-644-5135**

24/7 service for Albertans who don't have resources to meet their basic needs (e.g. food, clothing, shelter).

## Kids Help Phone

**1-800-668-6868**

24/7 service that provides child & adolescent counselling.

## Medication & Herbal Preparation Advice

**1-800-332-1414** (5 p.m. - 9 a.m.)

Advice about medicine & herbal products from pharmacists & nurses.

## Mental Health Helpline

**1-877-303-2642**

24/7 service for mental health concerns, including suicide.

## Poison & Drug Information Service

**1-800-332-1414**

24/7 advice on poisons, chemicals, medicines & herbal products.

This list is not all-inclusive.

# Handy Health Resources

## Health Services & Information from the Government of Canada & the Government of Alberta

- Recalls, diseases, immunizations, Canada's food guide & travel-related health information  
[canada.ca/en/services/health.html](http://canada.ca/en/services/health.html)
- Healthcare A-Z  
[myhealth.alberta.ca/health/Pages/default.aspx](http://myhealth.alberta.ca/health/Pages/default.aspx)
- Healthy Living Resources  
[myhealth.alberta.ca/health/healthy-living/Pages/default.aspx](http://myhealth.alberta.ca/health/healthy-living/Pages/default.aspx)

## Education Resources for Albertans

- Health Quality Council of Alberta: Stay safe in our healthcare system  
[hqca.ca/about/resources-for-albertans/choose-well-stay-health](http://hqca.ca/about/resources-for-albertans/choose-well-stay-health)
- Patient care handouts: Health information topics  
[myhealth.alberta.ca/Health/aftercareinformation/Pages/default.aspx](http://myhealth.alberta.ca/Health/aftercareinformation/Pages/default.aspx)
- Patient forum & community support tool  
[patientslikeme.com](http://patientslikeme.com)
- My Care Conversations app: Smartphone app to record conversations with your specialty consultation team  
[ahs.ca/info/page16144.aspx](http://ahs.ca/info/page16144.aspx)

## Find a Doctor

To find a primary care provider, visit: [albertafindadoctor.ca](http://albertafindadoctor.ca)

## Find a Healthcare Facility

To search for a hospital or facility in your area, visit: [albertahealthservices.ca/findhealth](http://albertahealthservices.ca/findhealth)

# Frequently Asked Questions

## Healthcare Basics

### **What does primary care mean?**

Primary care is the first point of contact patients access for healthcare services. It includes wellness advice and programs, non-emergent treatment of a health issue or injury, and diagnosis and management of health conditions.

### **What is a Primary Care Network (PCN)?**

Primary Care Networks (PCNs) include doctors and other healthcare professionals that work collaboratively to meet your primary healthcare needs in the community. PCNs are likely the first place you will go when you have a health concern.

### **What is the difference between a primary care provider and a specialist?**

A primary care provider - also known as a primary care/referring provider - is someone you initially see when you have a health concern. A specialist is a doctor who has expertise in a specific body system or organ. For example, a specialist with expertise in skin, nail and hair health is called a dermatologist. You might also hear doctors being referred to as physicians, clinicians or medical practitioners, but they are all the same.

### **What other health care professionals might I come across?**

In primary care, you may meet a registered nurse (RN), nurse practitioner (NP), mental health providers or medical assistants who will help with your care. A clinic will also have some support staff who might help with things like scheduling your appointments or taking your blood pressure.

## Referral & Specialist Consultation Process

### **What is a referral?**

Depending on your medical concern, a primary care/referring provider may recommend you to see a specialist to seek opinions or get certain medical services. A referral is a request for you to see a specialist or group of specialists.

### **How is a referral made?**

Primary care providers have options of initiating a request for advice or a face-to-face specialist consultation on your behalf as part of the referral process. Requesting advice allows you and your primary care provider to ask specialist questions related to your medical concern via phone calls or secure online platforms. Face-to-face consultations on the other hand, often result in a visit to the specialist's office and are made according to specialty referral guidelines. Referrals can be made via phone, fax, mail or electronic referral systems.



# Frequently Asked Questions

## Referral & Specialist Consultation Process (Continued)

### What happens when a referral is made?



1

Primary care office sends the referral to the specialist's office.



2

You may need to get lab tests or imaging prior to your specialist appointment.



3

You will be contacted by phone, email or mail to confirm your appointment.



4

The specialist's office will send you any special instructions (e.g. what to bring) to prepare for your appointment.

### What should I expect at my specialist appointment?

Ask your primary care/referring provider about what you should bring to your specialist appointment, however, we suggest bringing:

1. Your health care card
2. Your health-related insurance (if you have insurance)
3. A list of medications (or your MedList. See pg. 7 for more information)
4. List of allergies
5. Any relevant family medical history

Your specialist will meet with you to discuss your health concerns and look at your labs or imaging results. At this time, the specialist may diagnose your concern, order more tests or discuss treatment options.

### Can I ask my specialist questions?




Yes; ask any questions you feel are needed. See pg. 17 for some examples of questions you can ask the specialist.

# Medication List (MedList)

Having a list of medications you take is important for your healthcare team. You can get a copy of the medications you are taking from your pharmacy, or you can keep track of your medications, including pills, patches, creams, over-the-counter medicines and vitamins/supplements, on the Medication List (MedList).

Visit [myhealth.alberta.ca/alberta/Pages/medicine-tracking-tools.aspx](http://myhealth.alberta.ca/alberta/Pages/medicine-tracking-tools.aspx) to download and fill out the form. Translated versions are also available in Arabic, Chinese (simplified), Chinese (traditional), French, Punjabi, Spanish and Vietnamese.

Make sure you bring your completed MedList or a copy of your current medications you are taking with you to your next medical appointment.

**Medication List**

Having all your medications listed in one place helps your doctor, pharmacist, and other healthcare providers take better care of you. This **MedList** helps you keep track of what you're taking to keep healthy, such as prescriptions, vitamins, over-the-counter medicine, herbs, and supplements.

First and Last Name		Date of Birth	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	
Personal Health Number	Address	City	Province	Postal Code
Emergency Contact Name		Phone	Secondary Emergency Contact Name	
Family Doctor's Name		Phone	Pharmacy Name	
Specialist/Doctor's Name		Phone	Specialist/Doctor's Name	
Benefits/Medical Plan Name and # (e.g. Alberta Blue Cross)				
<b>Medical History</b> <input type="checkbox"/> Diabetes <input type="checkbox"/> Other medical history: <input type="checkbox"/> High blood pressure <input type="checkbox"/> Heart conditions <input type="checkbox"/> Breathing problems				
Allergies (The following is a list of <b>medications</b> I am <b>allergic</b> to, and what happens when I take them)				

EXAMPLE

Always keep your MedList updated or ensure you have an updated medication list from your pharmacy.

Wallet size also available too!

For more information about your MedList and medication tools, visit: [myhealth.alberta.ca/alberta/Pages/medicine-tracking-tools.aspx](http://myhealth.alberta.ca/alberta/Pages/medicine-tracking-tools.aspx)

# Pre-Appointment Notes

## Checklist

- Appointment date & time: \_\_\_\_\_
- Appointment address: \_\_\_\_\_
- Special instructions (parking or directions): \_\_\_\_\_
- Your health concerns & symptoms: \_\_\_\_\_
- Your health goals: \_\_\_\_\_
- Provincial healthcare card
- Your MedList or list of prescriptions and medications
- Copies of imaging or tests
- Health-related insurance

## Notes

Use this section to write down any reminders or notes you have before meeting with your primary care/referring provider.

# Pre-Appointment Notes

## Checklist

- Appointment date & time: \_\_\_\_\_
- Appointment address: \_\_\_\_\_
- Special instructions (parking or directions): \_\_\_\_\_
- Your health concerns & symptoms: \_\_\_\_\_
- Your health goals: \_\_\_\_\_
- Provincial healthcare card
- Copies of imaging or tests
- Your MedList or list of prescriptions and medications
- Health-related insurance

## Notes

# Pre-Appointment Notes

## Checklist

- Appointment date & time: \_\_\_\_\_
- Appointment address: \_\_\_\_\_
- Special instructions (parking or directions): \_\_\_\_\_
- Your health concerns & symptoms: \_\_\_\_\_
- Your health goals: \_\_\_\_\_
- Provincial healthcare card
- Copies of imaging or tests
- Your MedList or list of prescriptions and medications
- Health-related insurance

## Notes

# Patient & Caregiver Referral Checklist

## REFERRING PROVIDER INFORMATION

Name, phone, fax, indicate if different from family doctor

## SPECIALIST INFORMATION

Name, phone, fax, specialty

## REASON FOR REFERRAL

- Why am I being referred?
- What kind of specialist am I going to see?
- Am I seeing a specialist to:
  - Determine what is wrong?
  - Treat the condition?
  - Take over care of the condition?
  - Do a procedure?
- Am I being referred to a specific specialist or a group of specialists?
- What are my choices about who to see? Can I pick someone specific?
- How long are the wait times? Is my referral urgent?

Use this tool with your primary care provider to understand why you've been referred to a specialist

## REFERRAL PROCESS

- When will I find out my appointment details? How will I be informed?
- How long should I wait to call back if I have not heard anything?
  - Who should I contact?
- Who do I contact if my symptoms get worse?

## BEFORE THE APPOINTMENT

- What do I need to do before I see the specialist?  
*e.g. Lab tests and/or imaging, and the time frames to get them done*
- Who will provide my results to the specialist?
- How will I find out the details about my specialist appointment?  
*e.g. Address, directions, parking, etc.*
- What information do I need to bring to my specialist appointment?

## NEXT STEPS

- Are we changing anything in my care today?
- Is there a website or resource you can provide me with for more information?

# Referral Notes

Use this section  
to write down any  
notes you have  
when using the  
Patient &  
Caregiver Referral  
Checklist

Date & time of appointment: \_\_\_\_\_

Name of referring provider: \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## REASON FOR REFERRAL

## REFERRAL PROCESS

## BEFORE THE APPOINTMENT

## NEXT STEPS

# Referral Notes

Date & time of appointment: \_\_\_\_\_

Name of referring provider: \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## REASON FOR REFERRAL

## REFERRAL PROCESS

## BEFORE THE APPOINTMENT

## NEXT STEPS



# Referral Notes

Date & time of appointment: \_\_\_\_\_

Name of referring provider: \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## REASON FOR REFERRAL

## REFERRAL PROCESS

## BEFORE THE APPOINTMENT

## NEXT STEPS

# Examples of Specialists

## **Anesthesiologist**

A doctor who provides pain management care for patients undergoing surgery

## **Cardiologist**

A doctor specializing in heart & blood vessel health

## **Dermatologist**

A doctor specializing in skin, hair & nail health

## **Endocrinologist**

A doctor specializing in diabetes or hormonal health

## **Gastroenterologist**

A doctor specializing in digestive health

## **Geriatrician**

A doctor specializing in seniors' health

## **Hepatologist**

A doctor specializing in liver health

## **Internist**

A doctor specializing in the diagnosis and management of organ diseases

## **Nephrologist**

A doctor specializing in kidney health

## **Neurologist**

A doctor specializing in brain, spine & nerve health

## **Obstetrician/Gynecologist/Urogynecologist**

A doctor specializing in women's reproductive system & health

## **Oncologist**

A doctor who specializes in the treatment of cancer

## **Ophthalmologist**

A doctor who specializes in eye health

## **Orthopedic Surgeon**

A doctor who provides surgery for bone & joint health

## **Otolaryngologist**

A doctor who specializes in ear, nose & throat health

## **Pediatrician**

A doctor who specializes in child & adolescent health

## **Pulmonologist/Respirologist**

A doctor who specializes in lung & breathing health

## **Psychiatrist**

A doctor who specializes in mental & emotional health

## **Radiologist**

A doctor who analyzes imaging tests like x-rays & ultrasounds

## **Surgeon**

A doctor who performs surgery

## **Urologist**

A doctor who specializes in urinary tract & male reproductive system health

# Tips for Your Specialist Appointment/Consultation

## **Bring a list of medications and allergies & talk about them**

Fill out your MedList (see pg. 7) or bring a copy of your current medications from your pharmacy, and write out a list of your food, drug and environmental allergies. Talk to your specialist about them and make sure they know what you are taking or if you are allergic to anything.

## **Complete all required tests and imaging before your appointment**

You may be required to complete a lab test or imaging prior to your appointment and bring the results with you. If you are unable to complete your tests or imaging, talk to your primary care/referring provider or call the specialist's office before your appointment.

## **Come with questions**

You can ask the specialist any questions you want. Use the Patient & Caregiver Consultation Checklist (see pg. 17) as a guide for what questions you may want to ask during your appointment.

## **Take notes**

Use the notes pages included in this Journal to remember key information, bring a friend/family member, or use the My Care Conversations app (see pg. 4).

## **It's OK to say "No"**

It's your health and you have the right to ask questions and/or decline a treatment. If something doesn't feel right, ask your specialist before making any decisions.

## **Research your symptoms**

Your primary care/referring provider should give you information about your symptoms. You may also wish to visit the webpages we've suggested on pg. 4 to learn more.

## **Be Open, Be Honest**

Your specialist wants to help you, so we encourage you to share any medical issues or concerns you may have. Don't be embarrassed or worried; specialists will keep your information confidential and safe.

## **Plan Your Course**

Your specialist appointment might be in another area of the city or somewhere you are not familiar with. We suggest planning your route ahead of time so you can arrive prepared and ready for your appointment.

# Patient & Caregiver Consultation Checklist

## REFERRING PROVIDER INFORMATION

Name, phone, fax, indicate if different from family doctor

## SPECIALIST INFORMATION

Name, phone, fax, specialty

## PURPOSE OF APPOINTMENT

- What condition or symptoms are you seeing me for?

## DIAGNOSIS

- Are you diagnosing me with something? If so, what?
- How certain are you that this is the condition?
  - Could it be something else? If so, what?
- Are there any other tests that can be done to confirm this?
- How will this condition affect me?
- Are these effects long-term?
- Is this condition permanent?

Use this tool to help you ask key questions when meeting with your primary care provider or specialist

## PLAN

- What will my care plan be?
- What are the risks and benefits of this plan?
- What are my other treatment options?
- What are the risks and benefits of not treating this condition?
- How will I know if this plan is working?
- If this plan does not work, what should I do?

## FOLLOW-UP

- Will I see you again? When?
- Are you taking over the care of this issue from the doctor that sent me?
  - What do I do if my condition gets worse?
- Are you planning to send me to see any other healthcare providers?
- Will you provide the details of this appointment to my primary care/referring provider?
- When will my primary care/referring provider hear about today's visit?
- Where can I get more information?

# Consultation Notes

Use this section to write down any notes when using the Patient & Caregiver Consultation Checklist

Date & time of appointment: \_\_\_\_\_

Specialist's name: \_\_\_\_\_

Who referred you to this specialist? \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## PURPOSE OF APPOINTMENT

## DIAGNOSIS

## PLAN

## FOLLOW-UP

# Consultation Notes

Date & time of appointment: \_\_\_\_\_

Specialist's name: \_\_\_\_\_

Who referred you to this specialist? \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## PURPOSE OF APPOINTMENT

## DIAGNOSIS

## PLAN

## FOLLOW-UP

# Consultation Notes

Date & time of appointment: \_\_\_\_\_

Specialist's name: \_\_\_\_\_

Who referred you to this specialist? \_\_\_\_\_

Who was with you at the appointment? \_\_\_\_\_

## PURPOSE OF APPOINTMENT

## DIAGNOSIS

## PLAN

## FOLLOW-UP

# Notes



# Notes

# Notes

# QuRE Patient & Caregiver Journal

This resource is designed to help you navigate the referral and consultation process. Use the information and checklists in this Journal to help you ask key questions when meeting with your primary care providers and specialists.

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## Questions About this Journal?

If you have any questions, please contact the Alberta Health Services Access Improvement team at [access.ereferral@ahs.ca](mailto:access.ereferral@ahs.ca) or call 1-888-733-3755.

## Share Your Thoughts!

We want your feedback. Complete this short survey to share your referral and consultation experience: <https://bit.ly/3bMym2R>



Scan this code with your smart phone or tablet to go to the survey.

