

*Developed by Extension Educators:
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3-Steps to Organizing Your Medical Life Program Overview

Program Description

When was the last time you had a tetanus shot? What's your blood pressure? What did your last mammogram reveal? Stumped? You're not alone. Most people don't have their vital health statistics committed to memory, nor do they have records organized or tucked away in a file at home for easy reference. Knowing these stats could literally save your life as well as reduce a lot of added stress.

Gone are the days when your family doctor knew everything important about you and your medical past. Americans now switch primary care doctors more often – one study showed that a third of women have been with their doctor two years or less. We also frequently see specialists. That means more records in more places and less professional oversight.

Doctors are no longer the central keepers of health information. The burden of responsibility has shifted to the patient. You must keep track of your own health related information. Maintain a useful history of your health records and you'll be prepared when you change doctors or visit the EMERGENCY room or hospital. Your medical background helps doctors make accurate diagnosis and provide the best recommendations about preventive care and treatments. This program will help you with forms to gather the essential information about your health history and tell you which details you should collect regarding current and future health concerns.

Goals

- Encourage consumers to prepare for medical appointments
- Empower consumers to organize and maintain medical records

Suggestions for club meetings

- This lesson is organized in a teaching outline format with forms to be printed for participants.
- Review the "Teaching Outline" and become familiar with the three steps so that you can present the lesson in a conversation format. Please do not just "read" this lesson to your club members.

Supplies for the program

- Copies for each participant:
 - ___ Pre- and Post-test
 - ___ Create Your Health History Storage System
 - ___ Records You Need – Doctors
 - ___ Records You Need – Rx and OTC drugs
 - ___ Your Health Numbers
 - ___ Preparing for a Doctor Visit
 - ___ Medical Summary
 - ___ Medicare Expense Record
 - ___ Insurance Expense Record

Pre- and Post-Tests

We would appreciate you conducting the pre- and post-tests. Following the lesson, summarize the answers on one sheet (by doing this you will save postage) and mail to our office at 17746-E County Road 34, Goshen IN 46528 or email the summary to lienhart@purdue.edu.

For more information or questions:

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3 Steps to Organize Your Medical Life

Teaching Outline

Program Description

When was the last time you had a tetanus shot? What's your blood pressure? What did your last mammogram reveal? Stumped? You're not alone. Most people don't have their vital health statistics committed to memory, nor do they have records organized or tucked away in a file at home for easy reference. Knowing these stats could literally save your life as well as reduce a lot of added stress.

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Doctors are no longer the central keepers of health information. The burden of responsibility has shifted to the patient. You must keep track of your own health related information. Maintain a useful history of your health records and you'll be prepared when you change doctors or visit the EMERGENCY room or hospital. Your medical background helps doctors make accurate diagnosis and provide the best recommendations about preventive care and treatments. This program will help you with forms to gather the essential information about your health history and tell you which details you should collect regarding current and future health concerns.

Objectives

- Encourage consumers to prepare for medical appointments.
- Empower consumers to organize and maintain medical records.

Consider your project to be a long-term project. Good self-care is important for the rest of your life. To get the most from your health professionals, you'll need to meet them halfway. Here's how:

1. **Learn how to stay well.** This may seem obvious, but the better you take care of yourself, the less likely you'll get sick and the more quickly you'll get well if you do get sick.
2. **Know as much as you can.** Learn about your body and how it works. Pay attention to your symptoms. Knowledge is power!
3. **Be active on your own behalf.** When you visit the doctor, take an interest, ask questions and pay attention.

Pre-Test

Distribute the "Pre-Test". Ask participants to complete prior to presenting the lesson.

1. Is your medical information organized?
2. Do you have a written list of medications with you?
3. Do you prepare written questions before going to the doctor?

Step 1 – Organize

Create Your Health History Storage System

Distribute the “Create Your Health History Storage System” form. Review the form with participants.

A storage system keeps all your records, forms, and lab results in one organized place. This form teaches participants how to create a functional storage system.

Records You Need – Doctors

Distribute the “Records You Need – Doctors” form. Review the form with participants.

Write down your current doctors’ and most recent past doctors’ names and contact information. Old insurance claims may help with this information.

Records You Need – Prescription and Over the Counter Drugs

Distribute the “Records You Need – Prescription and Over the Counter Drugs” form. Review the form with participants.

Use this chart to write down any prescription (p) and non-prescription (np) medications, dietary supplements (d) or herbal remedies (h) you are currently taking. List below any allergies and reactions you’ve experienced.

Your Health Numbers

Distribute the “Your Health Numbers” form. Review the form with participants.

Take this form to your annual exams and track test results.

Step 2 – Prepare

Regular visits can help you and your doctor catch any problems early, perhaps even before you notice symptoms. If caught in time, many conditions can be treated successfully. Your doctor will recommend a routine schedule of exams based on your particular needs.

Before you go to your appointment, make a list. Know ahead of time what you’d like to talk about – both general concerns and specific questions. Putting your thoughts on paper can help you focus; list anything that’s been worrying you, and any questions you have. Try this:

Preparing for a Doctor Visit

Distribute the “Preparing for a Doctor Visit” form. Review the form with participants.

- Major concerns
- Minor concerns
- Things to talk about on the next visit

Discuss the following:

Help your doctor help you!

- | | | |
|---|--|--|
| 1. First, talk about your health issues | 5. Ask for translations | 9. Bring your own ideas |
| 2. Be specific | 6. Find out more about referrals and tests | 10. Don’t leave what you have learned at the office |
| 3. Tell the truth! | 7. Speak up | 11. Take the “Preparing for a Doctor Visit” form with you. |
| 4. Ask questions | 8. Can’t follow doctor's orders? Say so! | |

Medical Summary

Distribute the “Medical Summary” form to each participant.

Don’t wait until there’s an emergency. Fill out this form, carry it with you, and place another by your phone.

Step 3 – Maintain

You have done the work in Step 1, by gathering names and numbers of your doctors and your personal health numbers. Now you need to have the discipline to maintain these records.

Tracking Insurance Forms

Distribute the “Insurance Expense Record” and “Medicare Expense Record” forms.

One of the biggest challenges we all have with our health care is tracking our medical expenses. There are two forms to assist you in tracking those expenses.

- Insurance Expense Record
- Medicare Expense Record

Post-Test

Distribute the “Post-Test” for participants to complete after presenting the lesson.

- I plan to organize my medical information.
- I plan to complete the medical summary.
- I will prepare written questions before going to the doctor.

Developed by:

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3 Steps to Organizing Your Medical Life Pre-Test

Completion of this survey is totally voluntary and anonymous.

- | | | |
|---|-----|----|
| 1. Is your medical information organized? | Yes | No |
| 2. Do you have a written list of medications with you? | Yes | No |
| 3. Do you prepare written questions before going to the doctor? | Yes | No |

3 Steps to Organizing Your Medical Life

Step 1 – Organize

Create Your Health History Storage System

A storage system keeps all your records, forms, and lab results in one organized place. You decide which is going to work best for you, folders, notebook, envelope, an accordion file system. Here is a suggested list of tab labels:

- Basic Information
- Personal & Family History
- General Practitioner
- Dental
- Optical
- Medications/Immunization
- Specialists
- Insurance Forms
- Legal Forms: PS, MPoA, LWill
- Miscellaneous
- Organ Donor
- Alternative Medical



Records to file:

- Routine or preventive physical, dental, and vision exams.
- Records of any abnormal exams or test results you had in the past, such as a mammogram or an EKG.
- Blood and other laboratory tests (cholesterol level, blood glucose).
- Diagnostic tests (biopsies, x rays, EKGs, HIV and STD tests).
- Records of flue shots, immunizations you may have received for travel, and boosters, such as tetanus-diphtheria
- Screening tests (mammogram, Pap smear, clinical breast exam, skin check, sigmoidoscopy, and colonoscopy).

If you do not have these records, contact each of your physicians and ask for recent records from the list above that pertains to his or her practice. (You will be creating this list using the two forms titled “Records You Need”.) For instance, get the results of your most recent Pap smear from your gynecologist, skin exam from your dermatologist, and blood workups from your primary-care physician. Most physicians will ask that you mail in your request and some may require a processing fee.

3 Steps to Organizing Your Medical Life

Step 1 – Organize

Records You Need – Doctors

Write down your current doctors' names and contact information. Put this information in your file.

	Name and Address	Phone # / Fax #
General Practitioner		Ph:
First Visit _____		Fax:
Pediatrician		Ph:
First Visit _____		Fax:
Pharmacist		Ph:
First Visit _____		Fax:
Dentist		Ph:
First Visit _____		Fax:
Optometrist		Ph:
First Visit _____		Fax:
Specialists		Ph:
First Visit _____		Fax:
Specialists		Ph:
First Visit _____		Fax:
Specialists		Ph:
First Visit _____		Fax:
Specialists		Ph:
First Visit _____		Fax:
Other:		Ph:
First Visit _____		Fax:
Other:		Ph:
First Visit _____		Fax:
Other:		Ph:
First Visit _____		Fax:

3 Steps to Organizing Your Medical Life

Step 1 – Organize Records You Need – Prescription and Over the Counter Drugs

Use this chart to write down any prescription (p) and non-prescription (np) medications, dietary supplements (d) or herbal remedies (h) you are currently taking. List below any allergies and reactions you've experienced.

	Drug name	Dosage (mg)	Frequency (x's per day)	Date started
<input type="checkbox"/> p <input type="checkbox"/> np <input type="checkbox"/> d <input type="checkbox"/> h				
<input type="checkbox"/> p <input type="checkbox"/> np <input type="checkbox"/> d <input type="checkbox"/> h				
<input type="checkbox"/> p <input type="checkbox"/> np <input type="checkbox"/> d <input type="checkbox"/> h				
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<input type="checkbox"/> p <input type="checkbox"/> np <input type="checkbox"/> d <input type="checkbox"/> h				
<input type="checkbox"/> p <input type="checkbox"/> np <input type="checkbox"/> d <input type="checkbox"/> h				

Allergies:

Include reactions you've experienced

Foods _____

Medications: _____

Other _____

3 Steps to Organizing Your Medical Life

**Step 1 – Organize
Your Health Numbers**

Keep this form current and file in your medical records.

Name of Patient: _____ Blood Type: _____

Exams and Tests	20__	20__	20__	20__	20__
Height and Weight					
Blood Pressure (lower than 120/80)					
Cholesterol (Overall lower than 200) HDL: 60 or higher LDL: 129 or lower					
Blood Sugar					
Pap Smear/Pelvic Exam					
Breast Exam/ Mammogram					
Other Tests					
Eyesight					
Dental					

Lab Results

	Date/Results	Date/Results	Date/Results	Date/Results	Date/Results
BUN					
CREAT					
K+ (POTAS)					
HGB/HCT					
P T					
LDL CHOL					
TRIGLYC					
OTHER					

3 Steps to Organizing Your Medical Life

Step 2 – Prepare

Preparing for a Doctor Visit

Regular visits can help you and your doctor catch any problems early, perhaps before you notice symptoms. If caught in time, many conditions can be treated successfully. Your doctor will recommend a routine schedule of exams based on your particular needs.

Before you go, make a list. Know ahead of time what you'd like to talk about – both general concerns and specific questions. Putting your thoughts on paper can help you focus; list anything that's been worrying you, and any questions you have. Try this:

My major concerns:

1. _____
2. _____
3. _____

Doctor's comments and advice:

- _____
- _____
- _____

My minor concerns:

1. _____
2. _____
3. _____

Doctor's comments and advice:

- _____
- _____
- _____

Things to talk about on the next visit:

My medical history: If you're visiting for the first time, your doctor will need some important information about you. Inform your doctor of conditions you may have or had in the past, such as asthma, high blood pressure, serious illnesses, past injuries, hospitalizations, surgeries, or accidents.

My family's health history: Your doctor will want health background on your parents, siblings, and grandparents, such as chronic illnesses, heart disease, cancer or unusual longevity and causes of death - some tendencies run in families. Your doctor will write your medical history on his or her own form, but you can help out by being prepared. (See your family health tree)

Brown-bag all your medications, both prescription and over-the-counter drugs: Your doctor needs to know about all medications you're taking, including those prescribed by other physicians. It's a good idea to round up all the containers and take them with you to your appointment. Your doctor can protect you from taking too much medication or mixing them in a harmful way. Remember to include any vitamin supplements, herbal supplements, and all your other nonprescription items, such as allergy and cold medicines.

3 Steps to Organizing Your Medical Life
Step 2— Prepare
Medical Summary

Don't wait until there's an emergency! Take a minute to fill out the following; carry this with you and put another near your phone.

Doctor's name, address, and phone:

Doctor's emergency number (ask your doctor)

Medications (listed on reverse side)

Insurance/Benefit Provider telephone:

Your insurance or HMO number

Allergies

Organ Donor

3 Steps to Organizing Your Medical Life
Step 2— Prepare
Medical Summary

Don't wait until there's an emergency! Take a minute to fill out the following; carry this with you and put another near your phone.

Doctor's name, address, and phone:

Doctor's emergency number (ask your doctor)

Medications (listed on reverse side)

Insurance/Benefit Provider telephone:

Your insurance or HMO number

Allergies

Organ Donor

3 Steps to Organizing Your Medical Life Post-Test

Completion of this survey is totally voluntary and anonymous.

- | | | |
|---|-----|----|
| 1. I plan to organize my medical information. | Yes | No |
| 2. I plan to complete the medical summary. | Yes | No |
| 3. I will prepare written questions before going to the doctor. | Yes | No |