

# TAKING CONTROL OF YOUR HEALTH CARE: A GUIDE FOR SENIORS



**BE PREPARED. BE CONFIDENT.  
BE IN CONTROL.**

## **Disclaimer**

This guide is provided for informational and educational purposes only. No doctor/patient relationship is established by this booklet, and no diagnosis or treatment is being provided. Any information provided should be used in consultation with a physician or other health care provider. No guarantees or warranties are made regarding any of the information contained in this booklet. It is not intended to offer specific medical, dental or surgical advice to anyone.

**To receive more copies of this booklet or a copy of the  
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**Please call (210)-862-1678  
or  
send an e-mail to  
[info@patientinstitute.org](mailto:info@patientinstitute.org).**

**TAKING CONTROL OF YOUR HEALTH CARE:  
A GUIDE FOR SENIORS**

is presented by The Patient Institute

This booklet will give you the tools you need to partner with your doctor and take an active role in your health care. To get the most out of this booklet:

- Read the entire guide thoroughly ✓
- Follow the steps in each section ✓
- Answer all the questions so that you can refer back to them and show your doctor should you need to ✓
- Write down any questions you might have for your doctor ✓
- Write down anything else in the notes section ✓
- Refer to the underlined terms in the glossary in back ✓

## **IMPORTANT**

**ALWAYS CALL 911 OR GO TO  
THE EMERGENCY ROOM IF YOU HAVE  
A LIFE-THREATENING EMERGENCY**

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# WHY SHOULD YOU TAKE CONTROL OF YOUR HEALTH CARE?

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For many people, the U.S. health care system is often an intimidating and complicated system. From understanding how to set up and arrange an appointment with a doctor, to understanding different health insurance plans- each have their own set of procedures that need to be understood to manage one's health care effectively.

We at The Patient Institute want to help in that process by empowering and educating you to more effectively navigate the health care system. By providing education and resources to assist you in that endeavor, the process becomes less confusing meanwhile increasing your confidence and ability to maintain control of your health care needs all by yourself.



# HOW DO YOU TAKE CONTROL OF YOUR HEALTH CARE?

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You can take control of your health care by following these tips:

## **Keep track of important health information**

Any new information that the doctor informs you about, write it down.

## **Know your family's health history**

It's important to know of any diseases that might occur in the family so that if the doctor asks you about it you can reply surely.

## **See a doctor regularly for checkups**

During these regular checkups you can get screened for diseases such as cancer, high blood pressure or diabetes. You can also ask any questions you may have related to your current health problems, or voice new concerns.

## **Schedule and be prepared for appointments**

Write down everything the doctor needs to know about your medical history, like which medicines you take and what illnesses you have had or currently have. The checklists in this booklet will help you with Step 1. Keep those checklists close by; you might be asked a lot of the same questions at your appointment.

## **Ask questions and write down the answers**

Bring this booklet to your doctor's visit; it will help with Step 3. You'll have a list of your questions ready to go. You'll also have a place to take notes, so you can write down the doctor's answers, advice, and instructions.

## **Follow the doctor's advice and instructions.**

Be sure to follow all the instructions the doctor gives you. You might want to go back to your notes from the doctor's appointment — that way you can read them again and make sure you didn't miss anything.

## **Follow up after your appointment**

Whether it's because your medication was changed, you received surgery or were seen for the flu, following up with your primary care doctor is important to make sure you are in good health and properly managing your care after receiving treatment.

# STEP 1: SCHEDULE AND PREPARE FOR YOUR DOCTOR'S APPOINTMENT

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- Call the doctor's office to make your appointment.

When you call, have the following information with you:

- The reason for the appointment, for example:
  - Is it time for a regular check-up?
  - Is it a follow-up appointment?
  - Do you have a health problem you need to see the doctor about?
- Your name, address, telephone number, and e-mail address (if you have one)
- Your Social Security Number
- Your Medicare card and/or or health insurance card
- The name and number of your pharmacy
- The name of your **primary care doctor**  
For **referral** appointments, you will need the name of the doctor who referred you.



□ Call the doctor's office a few days before the appointment to make sure they have everything you may need, such as:

- Labs, like blood test results
- Images, like X-Rays or MRIs
- **Advance directives**
- Any other records or test results the doctor asked for

□ Bring these items with you to the appointment:

- This booklet, with all the checklists completed
- Your Social Security Number
- Your Medicare card and/or other health insurance card
- The name, address, and phone number of your pharmacy
- Any forms or information the doctor asked for
- Payment to cover any charges that are due at the time of the visit

# Prescriptions and Over the Counter Medications

<u>Medication/ Supplement</u>	<u>Dose/Frequency</u>	<u>Reason for taking</u>

<u>Medication/ Supplement</u>	<u>Dose/Frequency</u>	<u>Reason for taking</u>

Common Medications and Supplements:

- |                     |                     |                              |
|---------------------|---------------------|------------------------------|
| · Advil (Ibuprofen) | · Fiber Supplement  | · Prevacid                   |
| · Albuterol         | · Folic Acid        | · Prilosec                   |
| · Amoxicillin       | · Furosemide        | · Ranitidine                 |
| · Ampicillin        | · HCT               | · Rifampin                   |
| · Aspirin           | · Hyoscyamine       | · Simvastatin                |
| · Atenolol          | · Levothyroxine     | · Sudafed                    |
| · Azithromycin      | · Lisinopril        | · Tylenol<br>(Acetaminophen) |
| · Benadryl          | · Magnesium         | · Vitamin B12                |
| · Benxocaine        | · Metformin         | · Vitamin B6                 |
| · Calcium           | · Metoprolol        | · Vitamin D                  |
| · Cephalexin        | · Milk of Magnesia  |                              |
| · Clindamycin       | · Motrin (Naproxen) |                              |
| · Dicloxacillin     | · Nexium            |                              |
| · Dimetapp          | · Nortriptyline     |                              |
|                     | · Phendimetrazine   |                              |
|                     | · Potassium         |                              |

# Vaccinations

<u>Vaccines</u>	<u>Date Received (mm/dd/yy)</u>
___ Influenza	_____
___ TDAP	_____
___ Pneumococcal	_____
___ Hepatitis A	_____
___ Hepatitis B	_____
___ Zoster/Shingrix	_____
___ MMR	_____
___ Chickenpox	_____
___ Other:	_____
_____	_____

Influenza: to prevent the flu

TDAP: Tetanus, Diphtheria, Pertussis shot to prevent Lockjaw, nose/throat disease, and Whooping Cough

Pneumococcal: PCV13 and/or PPSV23 shot to prevent Pneumonia

Hepatitis A/B: Hep A and Hep B shot to prevent liver disease

Zoster: to prevent Shingles

MMR: protects against Measles, Mumps, and Rubella

Varicella: to prevent Chickenpox

# Common Allergy-Causing Medications (please circle if taking)

1) Antibiotics (ex: Amoxicillin, Penicillin, Tetracycline)

2) NSAIDs (ex: Ibuprofen, Naproxen, Aspirin)

3) Anticonvulsants (ex: Tegretol, Lamictal, Phenytoin)

4) Monoclonal antibody therapy (ex: Erbitux, Rituxian)

5) Chemotherapy (ex: Paclitaxel, Docetaxel, Teniposide)

6) Opioids (ex: Codeine, Hydrocodone)

**Write down any other known allergies here:**

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**Medical History**  
**(Illnesses or injuries**  
**you have now, or have**  
**had in the past...)**

Please check all that  
apply

- Emphysema/COPD
- Tuberculosis
- Pneumonia
- Bronchitis
- Asthma
- Congestive Heart Failure/  
Coronary Artery Disease
- Stroke
- Heart attack
- Diabetes
- High Blood Pressure
- Venous Thrombosis
- Hepatitis A
- Hepatitis B
- Hepatitis C

- Elevated Cholesterol
  - Cirrhosis
  - End Stage Renal Disease/Chronic  
Kidney Disease
  - Anemia
  - Thyroid Trouble
  - Gallbladder Disease
  - Ulcers
  - Frequent Urinary Tract Infections
  - Sexually Transmitted Infections
  - Prostate Trouble
  - Arthritis
  - Osteoporosis
  - Fractures
  - Migraines
  - Depression
  - Anxiety or Panic Disorder
  - Posttraumatic Stress Disorder
  - Alcohol or Substance Use  
Problem
  - Cancer: \_\_\_\_\_
  - Other: \_\_\_\_\_
-

## **Surgical History (any surgeries or procedures you have had in the past. . .)**

Please check all that apply.  
Be sure to show dates if you know them

- Appendectomy (removal of appendix)
- Cholecystectomy (removal of gallbladder)
- Open heart surgery
- Thyroidectomy (removal of thyroid)
- Cardiac stent placement
- Hysterectomy (removal of uterus)
- Tubal Ligation (a.k.a “tubes tied”)
- Colonoscopy/Endoscopy
- Ileostomy/colostomy
- Cataract surgery

- Spinal (back/neck) surgery
- Exploratory abdominal surgery
- Cesarean section
- Hernia repair
- Tonsillectomy (removal of tonsils)
- Paracentesis (removal of fluid from abdomen)
- Dialysis fistula placement
- Blood transfusion
- Orthopedic (bone/tendon/ligament) surgery:  
\_\_\_\_\_
- Organ Transplant:  
\_\_\_\_\_
- Cancer tumor resection:  
\_\_\_\_\_
- Other:  
\_\_\_\_\_

## Answer these questions about your health and lifestyle.

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Marital Status:  Single  Married  Widowed  
 Divorced  Domestic Partner/Significant Other

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Do you drink alcohol?  Yes  No

If yes, how much? \_\_\_\_\_ Drinks per day  
\_\_\_\_\_ Drinks per week

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Do you smoke or chew tobacco?  Yes  No  
If yes, which type(s)?  Cigarettes  Cigars  
 Pipe  Chewing Tobacco  E-Cigarettes/Vaping

How much? \_\_\_\_\_ Per day / Per Week

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How is your diet?  Good  Fair  Poor

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Do you exercise?

Yes

No

If yes, which type(s)?

Walking

Running

Biking

Swimming

Dancing

Playing Sports

Yoga

Stretching

Lifting Weights/Resistance

Other \_\_\_\_\_

How long?

\_\_\_\_\_

Mintues

How Often?

\_\_\_\_\_

Times Per Day / Per Week

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Is violence at home a concern for you?

Yes

No

Have you been abused in any way?

Yes

No

Some examples of abuse are physical abuse, sexual abuse, emotional, abuse, and financial abuse.

Do you ever feel neglected or abandoned?

Yes

No

Do you ever feel confused about medicine?

Yes

No

For example, how much you should take, or how often you should take it.

# STEP 2: YOUR DOCTOR'S APPOINTMENT

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We understand talking to a doctor can be intimidating, which makes asking the right questions stressful and receiving the information you want difficult. So, we have developed a few strategies for you to implement the next time you visit your doctor for your next appointment.

## Arriving at your appointment:

- **Come prepared with a list of questions and concerns pertaining to any issues you want answered** (You may use the list of questions provided in this guide or write down any other questions that come to mind).
- **Prioritize your questions in order of importance.** You want your list to reflect the main issues that brought you to the appointment.
- **Take someone with you to your appointment for support or to ask any questions for you that may be too difficult.** In addition, this person may act as a translator if the doctor doesn't speak the language of your preference.

# How to Communicate with your Primary Care Doctor

- Be honest with what you are communicating to the doctor. The information you are providing your doctor needs to be the truth, so the doctor can treat your issues efficiently.
- Thorough communication between you and your doctor is key. Inform the doctor if you feel rushed, confused, intimidated or dissatisfied during the appointment. Ask your doctor to explain anything you don't understand, or to speak slower, louder or clearer if you are having any difficulty understanding the information.
- Doctors are here to treat your issues and give you professional advice for your health. By asking questions and voicing your concerns you are helping to build a stronger doctor-patient relationship which will ultimately improve your health.

# Step #3: Ask Questions and Write Down the Answers

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It is important to ask questions whenever you visit the doctor. We've provided you with a list of questions to get the conversation started. You'll also have a place to take notes, so you can write down the doctor's answers, advice, and instructions.

The Appointment Log can be used for an appointment with any kind of doctor:

- **Primary Care Doctor** (Also called family care doctor)
- **Specialist** (ex: surgeon, ophthalmologist, rheumatologist, neurologist, etc.)
- Doctor at an **Urgent Care Clinic** or at the **Emergency Room**

If you would like a copy of the Appointment Log you can

1. Order them by calling (210) - 862-1678
2. Or by sending an e-mail to [info@patientinstitute.org](mailto:info@patientinstitute.org)

# Sample Questions

## Tests

- What is the test for?
- How is the test done?
- What do I need to do to get ready for the test?
- When will we get the results and what will they tell us?
- What will you want to do if the results are positive?

## General

- How much will this cost me?
- Do I need to get a second opinion?
- Do we have to do this now, or can we revisit it later?

## Treatment

- Why do I need treatment?
- What are my options for treatment? How effective is each treatment option? What are the benefits versus risks of each treatment option?
- Are there any side effects or warnings for each choice?
- If my symptoms worsen, what should I do on my own? When should I contact you?

## **Medicine**

- How much should I take and how often should I take it?
- How does this medicine work? What is it used for?
- Will there be any effects with the medicine I'm already taking?
- What happens if I forget to take my medicine?
- Should I be concerned about any side effects?
- What should I do if I think I'm having side effects or a bad reaction?

## **Surgery**

- Why do I need surgery?
- Are there other ways to treat my problem besides surgery?
- How should I get ready for the surgery?
- How long will I be in the hospital?
- What can I eat or drink after surgery?
- What activities can I safely do?
- How will I control my pain?
- Should I expect to get therapy after surgery?

# Questions To Take Into Consideration Before Visiting Your Doctor

- Where is my pain located?
- Does my pain stay in one place or move around?
- Does anything specifically trigger my pain? (walking, eating, etc.)
- Do I experience numbness, tingling, burning, stinging, or electric-like sensations?
- Is my pain constant, or does it come and go?
- How has pain impacted my quality of life? (hurt relationships, lifestyle changes)
- On a scale from 1 to 10, with 10 being the worst pain imaginable, how do I rate my pain?

# **Make a list of your questions for the doctor**

Write down the doctor's answers, so you can review them later.

Question:

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Answer:

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Question:

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Answer:

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Question:

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Answer:

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**Write down the doctor's advice and instructions here**

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**Need Appointment Logs?**

**You can order them by calling (210)-862-1678  
or sending an e-mail to [info@patientinstitute.org](mailto:info@patientinstitute.org)**

# MEDICAL TERMS GLOSSARY

*Below are some medical terms that are important to know.*

## **Primary Care Doctor**

A primary care doctor is your main doctor for checkups, **vaccines**, and common medical problems, like:

- High blood pressure
- Mild stress
- Cold or flu
- Sprained ankle
- Sadness or depression
- Fever under 103°
- Skin rash

It's a good idea to have one primary care doctor. That way, the doctor can get to know you and your medical needs. If you need special care, your primary care doctor might give you a **referral** to see a **specialist**.

## **Referral**

A referral is the doctor's orders for you to see a **specialist**. The doctor might give you a note for the referral appointment. Or, the doctor's office might set up the referral for you.

## **Specialist**

A specialist is a doctor who is an expert in one kind of medical care, like a heart doctor (cardiologist), an eye doctor (ophthalmologist), or a doctor who treats cancer (oncologist).

## **Supplements (also called dietary supplements)**

Dietary supplements are products like vitamins, minerals, and herbals. You should always talk to your doctor before taking them. To help you and your doctor make good choices about supplements, ask questions like:

- Do I need a dietary supplement?
- How will it work with the medication I already take?
- Are there any side effects or warnings I should know about?

## **Advance Directives**

Advance directives are legal papers that tell your doctor and loved ones about the kind of care you want if you become very ill and you can't make choices for yourself. Some important advance directives to have are a **living will**, **power of attorney**, and a **Do Not Resuscitate Order** or **Do Not Intubate Order**



### **CPR**

#### **(Cardiopulmonary Resuscitation)**

CPR is a way to treat someone if their heart stops beating or they stop breathing. CPR could be:

- Mouth-to-mouth breathing
- Chest compressions
- Administration of cardiac drugs

### **Do Not Resuscitate Order (also called a DNR)**

A Do Not Resuscitate Order is an **advance directive** that says the doctor cannot try to restart your heart or your breathing once it has stopped, if that is your wish. Resuscitation refers to **Cardiopulmonary Resuscitation**, or **CPR**.

### **Do Not Intubate Order (also called a DNI)**

A Do Not Intubate Order is an **advance directive** that says that a doctor is allowed to perform chest compressions and give you cardiac drugs once your heart or breathing has stopped, but a breathing tube will be *not* placed, if that is your wish.

**Give a copy of the DNR/DNI to your doctor, hospital, spouse, and children.** It's also a good idea to keep a copy at home in plain sight, like on the refrigerator.

## **Over-The-Counter Medicine (also called OTC medicine)**

Over-the-Counter medicine is medicine you can buy without a **prescription**. When you take OTC medicine, it is important to follow all the directions. If your **symptoms** don't go away, it may be time to see your **primary care doctor**. If you have any questions about OTC medicine, ask your doctor or pharmacist.



## **Emergency Room (also called the ER)**

The emergency room is where you should go if you ever have a **life-threatening emergency**. It's a good idea to know where the closest ER is at all times. The ER is always open, but you should not go there for problems that can be treated by your **Primary Care Doctor** or at an **Urgent Care Clinic**.

It should only be used for emergencies.

## **Life-Threatening Emergency**

A life-threatening emergency is a medical problem that could put your life in danger, like:

- Pain in your chest
- Choking or problems breathing
- Bleeding that won't stop
- Fever over 103°
- Coughing or throwing up blood
- Eating or drinking something poisonous
- Getting hurt in a car accident or a fire
- Fainting or getting "knocked out"
- Thinking about hurting yourself or someone else

Always call 911 or go to the **emergency room** right away if you have a life threatening emergency.

## **Patient Safety**

Patient safety means being on the lookout for medical mistakes, like taking the wrong pills or getting an infection in the hospital. Everyone has a role to play in patient safety. You can help by:

- Telling the doctor about all medicines or **supplements** you take
- Asking any questions you have about your health care
- Reminding doctors, nurses, and visitors to wash their hands before seeing you

## **Power of Attorney**

Power of attorney is an **advance directive** that lets you pick someone to make medical choices for you if become very ill and you can't make choices for yourself. This person might be a husband, wife, or child. It could also be a friend or relative. You should pick someone you trust — someone who knows you well and will make good choices for you based on your wishes.

## **Prescription Medicine**

Prescription medicine is a drug that must be ordered by a doctor, or other licensed medical providers. Most of the time, you will get prescription medicine from a drugstore or a pharmacy. The medical provider might give you a hand-written note or print-out to take to the drugstore. Or, the doctor's office might call the pharmacy for you. When you take prescription medicine, it is important to follow all the directions. If you have any questions about prescription medicine, ask your doctor or pharmacist.



## **Symptoms**

Symptoms are clues that you might have a health problem. It's important to tell your doctor about all the symptoms you have, especially the ones the doctor can't see, like having pain, being stressed out, or feeling sad.

## **Urgent Care Clinic (also called a walk-in clinic)**

An urgent care clinic is for common medical problems that are not **life-threatening emergencies**, but should be taken care of quickly. Examples include: cuts that may need stitches or broken bones. You might also go to a walk-in clinic if you can't get an appointment with your **primary care doctor** right away, or if you need to see a doctor at night or over the weekend.

## **Vaccine (also called immunization)**



Vaccines help protect against many diseases. Most of the time, they are given in the form of a shot. Talk to your **primary care doctor** about which shots you should get, and how often you should get them. Some are very important for seniors, like:

- Flu shot - to protect you from the flu
- Pneumococcal - to protect you from pneumonia
- Tdap - if you are going to spend any time around a baby, you'll need this shot to protect the baby from Whooping Cough

# BASIC INSURANCE INFORMATION YOU SHOULD KNOW

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At The Patient Institute, we know trying to understand the definitions of terms that insurance organizations are providing to the public can be difficult. In consideration to that difficulty, we have broken down the basic terms into easy to understand definitions for you.

## **Deductible**

Amount you owe for covered health services before your health plan begins to pay.

## **Annual deductible**

If your health insurance plan has a \$2,000 deductible, you must pay the first \$2,000 out of pocket for your health services before the insurance kicks in.

## **Coinsurance**

Your share of costs of a covered service, calculated as a %, of the allowed amount for the service. You pay this plus any deductibles you owe.

## **Copayment**

If your copayment is set at \$30, you must pay \$30 each time you visit a doctor or fill out your prescription.

## **Premium**

The amount that must be paid for your insurance policy.

## **Out-of-Pocket Costs**

Your expenses for medical care that are not paid by your insurance policy. Out-of-pocket costs include deductibles, coinsurance, and copayments for covered services plus all costs for services that aren't covered in your health insurance policy.

## **Out of Pocket Limit**

The most you pay during a policy period (usually a year) before your health insurance policy begins to pay 100% of the allowed amount. This limit never includes your premium, balance-billed charges or health care your health insurance policy doesn't cover. Some health insurance policies don't count all of your co-payments, deductibles, co-insurance payments, out-of-network payments or other expenses toward this limit.

## **Enrollee**

An individual covered under the plan









# THE PATIENT

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I N S T I T U T E

## **The Patient Institute**

(210)-862-1678

[www.patientinstitute.org](http://www.patientinstitute.org)

At the Patient Institute, we help provide guidance and education to patients and caregivers on the complexities of the health care system.

Think of The Patient Institute as your handbook on navigating the healthcare system. From better organization at medical appointments to information on long term care and hospital stays—we've got you covered.

For more helpful tools like this booklet, go to The Patient Institute website at [www.patientinstitute.org](http://www.patientinstitute.org), and click “Tools.” If you'd like more copies of this booklet or the Appointment Log, call (210)-862-1678 or send an e-mail to [info@patientinstitute.org](mailto:info@patientinstitute.org).

If you need help finding a **primary care doctor** or **specialist**:

1. Go to [www.patientinstitute.org](http://www.patientinstitute.org)
2. Click “Tools”
3. Click “The ‘Find a Doctor Database’” under “Find a Physician”
4. Fill out the “Find Your Doctor” form, then click “GO”