Patient Information Name, DOB, PHN, Address, Phone, Alternate contact, Translator required

Primary Care MD/NP Information
Name, Phone, Fax, CC/Indicate if different from family physician

Requesting MD/NP Information
Name, Phone, Fax

Clear Reason for Referral
- Diagnosis, management and/or treatment
- Procedure issue/Care transfer
- Is patient aware of reason for referral?

Patient's Current Status
- Stable, worsening or urgent/emergent
- What do you think is going on?
- Patient's expectation
- Symptom onset/Duration
- Key symptoms & findings/Any red flags

Relevant Findings (Results Attached)
- What has been done & is available
- What has been ordered & is pending

Current & Past Management (With Outcomes)
- None
- Unsuccessful/Successful treatment(s)
- Previous or concurrent consultations for this issue

Comorbidities
- Medical history
- Pertinent concurrent medical problems
  - List other MD/NP involved in care if long-term
- Current & recent medications (name, dosage, PRN basis)
- Allergies/Warnings & challenges

Patient Information Name, DOB, PHN, Address, Phone, Alternate Contact, Translator required

Requesting MD/NP Information
Name, Phone, Fax, CC/Indicate if different from family physician

Consulting MD/NP Information
Name, Phone, Fax

Purpose of Consultation

- Date request received & date patient was seen
- Diagnosis, management and/or treatment
- Procedure issue/Care transfer/Urgency

Diagnostic Considerations

- What do you think is going on?
  (Definitive, Provisional, Differential)
- Why? (Explain underlying reason)
- What else is pertinent to management?

Management Plan

- Goals & options for treatment & management
- Recommended treatment & management
  - Rationale/Anticipated benefits & potential harms
  - Contingency plans for adverse event(s)/Failure of treatment
- Advice given/Action(s) taken
- Situation(s) that prompt earlier review

Follow-Up Plan

- Indicate designated responsibility for:
  - Organizing reassessment & suggested timeframes
  - Medication changes (Clarify complete or suggestion only)
- Further investigations
  - Recommendations
  - Responsibility for ordering, reviewing & notifying patient

QuRE quality referral evolution

Quality Consult Pocket Checklist