APPENDIX B: PRIMARY CARE CONSULT TEMPLATE

Use this template to present patient information (in this order) when consulting the NP/MD

1. **Patient Profile**
    - Patient name
    - DOB
    - AB Health #
2. **Subjective Data**
    - Chief complaint/Reason for visit
    - History of chief complaint/ Presenting illness
        - Onset
        - Location
        - Duration
        - Characteristics/associated symptoms
        - Alleviating and aggravating factors
        - Timing
        - Previous episodes
        - Associated symptoms such as fever, nausea and vomiting.
    - Past Medical History
        - Past Medical/Surgical/Obstetrical
        - Family
    - Immunization status
    - Current meds.-include traditional therapies
    - History of Substance Abuse (ETOH/Recreational Drug use, etc.)
    - Allergies-including severity of reaction (eg. penicillin-anaphylaxis), medications, foods
        i. Describe the reaction
    - Date and reason for last clinic visit
        - Recent labs / diagnostics (eg. urine culture, hemoglobin results)
        - Last antibiotic used – including date
    - Recent hospitalizations
    - Review of pertinent systems – focused or general exam
3. **Objective Data – Assess systems – *pertinent to the chief complaint, eg. If patient presents with a cough, then examine the respiratory and cardiovascular systems. If patient presents with a sinus infection, examine the respiratory system, cervical/occipital/pre auricular/post auricular/tonsil nodes and the HEENT.***
    - Vital Signs
    - Weight – for pediatric clients (or adult if weight a factor – CHF, anorexia, >wt loss, etc.)
    - General appearance (eg. Unwell)
    - HEENT
    - Respiratory
    - Cardiovascular and peripheral vascular
    - Gastro/ABD
    - Genito-urinary
    - Musculoskeletal
    - Neurological

- Psychiatric
- Endocrine

4. **Analysis / Diagnosis – *To be determined in consultation with the NP/MD***
5. **Plan - *To be determined in consultation with the NP/MD – plan may include:***
    - Diagnostics (eg. Labs)
    - Interventions
        - Pharmacological and other therapies
        - Education
    - Referral
    - Follow Up