

# Referral Form

## Patient Information – To Be Completed by Patient

Date \_\_\_\_\_

Check if primary contact

Patient Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Cell phone \_\_\_\_\_

Landline \_\_\_\_\_

Email \_\_\_\_\_

Primary language:  English  Spanish

Other \_\_\_\_\_

Check if primary contact

Name of the person completing form for the patient and relationship to patient \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Primary language:  English  Spanish

Other \_\_\_\_\_

### ► Preferred Method of Contact:

Phone \_\_\_\_\_ Email \_\_\_\_\_ Other \_\_\_\_\_

Preferred day/time to be contacted \_\_\_\_\_

Type of insurance \_\_\_\_\_

## Patient Authorization to Be Contacted

I give permission to my doctor to share my information with an individual or organization who will contact me about support programs and other services.

Signature \_\_\_\_\_ Date \_\_\_\_\_

The person being referred provided verbal consent instead of signature.  Yes  No

The person being referred was given an expert to contact, suggestions on types of services or care to request, and an FAQ document (pages 4 & 5 of this form).  Yes  No

## Referral Information – For Use by Primary Care Team

Check all that apply. Highlight the most urgent one as the starting point for a referral.

Issue(s) Triggering Referral	Examples of Types of Professional to Receive Referral
<b>Information and Education</b>	
<input type="checkbox"/> Education of person with dementia or caregiver education	Social worker, nurse, gerontologist
<input type="checkbox"/> Legal and financial planning	Attorney who can help with supported decision making, power of attorney for health care or finances, living wills, advance directives
<input type="checkbox"/> Clinical trials information	Study coordinator
<b>Managing Symptoms of Dementia</b>	
<input type="checkbox"/> Quality of life improvement	Clinical psychologist, gerontologist, occupational therapist, physical therapist, speech therapist, recreation therapist, music therapist
<input type="checkbox"/> Mental health and therapy	Clinical social worker, clinical psychologist
<input type="checkbox"/> Neuropsychiatric symptoms (agitation, depression, hallucinations)	Geriatric psychiatrist, neuropsychologist
<b>Addressing Comorbidities and Other Clinical Needs</b>	
<input type="checkbox"/> Care consultation	Clinical social worker
<input type="checkbox"/> Care or case management	Case manager, care manager
<input type="checkbox"/> Medication management	Nurse, pharmacist
<input type="checkbox"/> Safety (home, driving, guns)	Occupational therapist
<input type="checkbox"/> Functional loss	Speech-language pathologist, occupational therapist
<input type="checkbox"/> Motor loss	Physical therapist, occupational therapist, physiatrist
<input type="checkbox"/> Hearing loss	Audiologist
<input type="checkbox"/> Vision loss	Optometrist, ophthalmologist
<input type="checkbox"/> Nutrition (lack of regular nutrition, loss of appetite, dehydration)	Dietitian, nutritionist, dentist
<input type="checkbox"/> Comorbid conditions (e.g., pain, arthritis, diabetes)	Palliative care nurse or doctor, rheumatologist, endocrinologist

If referring **within** your organization, please indicate contact information for the qualified individual:

\_\_\_\_\_  
Name and Department

\_\_\_\_\_  
Contact Information (office phone)

If referring **outside** your organization, please indicate contact information for the qualified individual:

\_\_\_\_\_  
Name and Department

\_\_\_\_\_  
Contact Information (phone and email)

## External Organizations for Referrals — For Use by Primary Care Team

Organization	Contact Information	Examples of Services Offered
<b>General Community-Based Organizations</b>		
Local Area Agency on Aging (AAAs)	Find your local AAA by visiting <a href="http://eldercare.acl.gov">eldercare.acl.gov</a> or calling 1-800-677-1116	Coordinates and offers services to help older adults remain in their homes (e.g., home-delivered meals).
Aging and Disability Resource Centers (ADRCs)	Find your local ADRC by visiting <a href="http://eldercare.acl.gov">eldercare.acl.gov</a> or calling 1-800-677-1116	Provides information, advice, counseling, and assistance; helps people make informed decisions about long-term services and supports; helps people access public and private programs.
Aging Life Care Association	Visit <a href="http://www.aginglifecare.org/">www.aginglifecare.org/</a> and click on the “Find an Aging Life Care Expert” button on the top right side	Provides contact information for geriatric care managers with backgrounds in social work, psychology, gerontology, or nursing.
Family Caregiver Alliance	1-800-445-8106 <a href="http://www.caregiver.org/family-care-navigator">www.caregiver.org/family-care-navigator</a>	Offers toll-free helpline to support caregivers, as well as a variety of programs that are searchable by state.
<b>Dementia-Specific Organizations</b>		
Dementia Action Alliance	Visit <a href="http://www.daanow.org">www.daanow.org</a>	Offers a range of services and supports including weekly virtual discussions, podcasts, a resources center, and more.
The Association for Frontotemporal Degeneration	HelpLine: 1-866-507-7222 <a href="http://www.theaftd.org">www.theaftd.org</a>	Offers support and practical tips for living with a frontotemporal degeneration diagnosis.
Alzheimer’s Association	24/7 Helpline: 1-800-272-3900 <a href="http://www.alz.org/help-support">www.alz.org/help-support</a>	Offers a range of services including a 24/7 helpline, 24/7 Wandering Support for a Safe Return, support programs, education programs, and early-stage social engagement programs.
	<a href="http://www.communityresourcefinder.org">www.communityresourcefinder.org</a>	The Online Community Resource Finder can help people with dementia and their families find help in their communities.
Alzheimer’s Foundation of America	National Helpline: 1-866-232-8484 <a href="http://alzfdn.org/caregiving-resources/">alzfdn.org/caregiving-resources/</a>	Has a toll-free helpline staffed by licensed clinical social workers, educational online resources, and caregiver support groups.
Lewy Body Dementia Association	Lewy Line: 1-800-539-9767 <a href="http://www.lbda.org/support">www.lbda.org/support</a>	Provides a variety of resources for families affected by Lewy body dementia, including an online community, support groups, peer-to-peer telephone and email support for caregivers, and educational resources.
<b>Opportunities to Participate in Research Studies</b>		
National Institute on Aging: Alzheimer’s Disease Education and Referral Center	Call 1-800-438-4380 or visit <a href="http://www.nia.nih.gov/alzheimers/clinical-trials">www.nia.nih.gov/alzheimers/clinical-trials</a>	Publicly available online database to search for relevant clinical studies recruiting patients in local geographic area.

## Requesting Services

[Contact information to be provided by primary care team]

Name of organization: \_\_\_\_\_

Name and phone number of expert to call: \_\_\_\_\_

## Here is an example of how to start the conversation

"Hello, my name is [\_\_\_\_\_].

I was recently diagnosed with \_\_\_\_\_

[example: dementia due to Alzheimer's disease, mild stage]

at \_\_\_\_\_ [insert name of practice/clinic].

They recommended that I call you. I am calling for information on free education programs in my area [specify your area]\_\_\_\_\_.

I don't think I need specific services at this time, just some education and to learn how you might be able to help me."

**Adapted from Wisconsin Alzheimer's Institute—University of Wisconsin School of Medicine and Public Health**

# Frequently Asked Questions

## ► What is dementia?

Dementia is a general term used to describe thinking and memory issues severe enough to interfere with daily life. Alzheimer's disease is the most common type of dementia. Other conditions can cause dementia as well, such as Lewy body disease, head injuries, Parkinson's disease, frontotemporal disorders, and stroke.

## ► Who is considered a caregiver?

A caregiver, care partner, or carer is an individual (paid or unpaid) who provides any type of assistance to another person who is ill, disabled, elderly, or needs help. Such assistance includes helping with shopping, organizing mail/bills, preparing meals, mowing the grass, housekeeping, laundry, or taking the person to doctor appointments. The caregiver role tends to evolve naturally, with the individuals not recognizing that they are caregivers and that they also need support.

## ► I don't need help right now. Why should I contact a support agency such as my local Area Agency on Aging?

Even if you don't think you need assistance right now, it will be helpful to learn the jargon used, the types of services available, and common safety and legal needs. The dementia care world is complex; starting now will help minimize mistakes and crisis decisions. Information to ask for:

- Common terms and definitions (e.g., What is respite, long-term care?)
- Classes and educational programs
- Home safety ideas
- Where to find a list of services in your community
- Ways to minimize caregiver stress

## ► Does Medicare (T18) pay for help around the house, home-delivered meals, or assisted living?

Medicare (T18) is the national health insurance program for people ages 65 and older, and for some younger persons with disabilities. Medicare covers hospital stays, doctor visits, prescription drugs, and other health care-related services. It does not pay for adult day services, homemaking assistance, home-delivered meals, senior centers, assisted living, transportation, or other supportive services.

Adapted from Wisconsin Alzheimer's Institute—University of Wisconsin School of Medicine and Public Health