

Follow-up letters to family doctors: A checklist for optometrists

This checklist is intended to guide optometrists in writing effective follow-up letters to family doctors to support continuity of care for patients.

The Alberta Association of Optometrists partnered with family doctors, optometrists, and patients to develop this checklist to strengthen interprofessional collaboration for improved patient care.

Follow-up letters may be necessary for ongoing monitoring, urgent or emergency care, responding to medical referrals, and addressing concerns. **This should be a short, one-page update for family doctors that includes the key information.**



Provide a clear summary of results and treatment plan

Summarize the concern and your recommendations in a few **concise statements**. Use **plain language** wherever possible, avoiding the use of acronyms.

Be sure to specify whether this report is for their records only or if a response is requested.



List the actions taken by you and the actions required from the family doctor and patient

Outline the actions that you have taken (such as providing prescriptions, treatments, and referrals), and the actions required from the family doctor and patient. You can mention that this will ensure timely care for the patient.



Specify if you have referred the patient to another health care provider

If you have referred the patient to another health care provider, **clearly state** this in your letter. Include the provider's name, clinic address, and any relevant context to support continuity of care.



Request an update if needed

To support continuity of care, request updates from the family doctor on any further testing, evaluation, or treatment. You can use a direct question like: **Can you please send me an update when possible?** You can mention that this information helps ensure effective monitoring and screening for the patient. Similarly, be sure to send relevant updates to the family doctor as necessary.

Receiving follow-up letters from optometrists allows the family doctor to be a more effective quarterback for their overall medical care.

Whether it's knowing when their last diabetic retinopathy assessment was or recognizing that they're suffering from dry eyes, we can use this information to promote regular eye exams, diagnose conditions that can have ocular symptoms, and keep track of medications/drops that are being used.

– Dr. Deanna Funk, Family Doctor in Spirit River, AB



Include details about prescriptions

Provide information about any prescriptions given to the patient, including the type, dosage, and intended use. Clearly state **who is responsible for managing and prescribing future refills**.



Discuss patient preferences and barriers to access

Include any relevant details about the patient's preferences for eye care, as well as barriers they may face in accessing services — such as financial constraints, mobility challenges, language differences, or disabilities. **Note any accommodations provided or resources discussed** to help the family doctor continue supporting the patient's needs effectively.



Offer to discuss results by phone if possible

If appropriate, suggest a phone call to discuss the findings. **Include your full name, clinic name, and direct contact number** for timely follow-up.



Include this link for more information

To help raise awareness among family doctors about the optometry scope of practice and available coverage, **please include this message at the end of your letter:**

Questions about optometry scope of practice and available coverage?

Visit <https://optometrists.ab.ca/for-health-professionals/working-together>

Sample Letter

From:
Dr. [Full Name]
[Clinic Name]
[Address]
[Phone]
[Fax]

To:
Dr. [Full Name]
[Clinic Name]
[Fax number]

RE:
[Patient Name]
[DOB]
[Address]
[Primary Phone Number]
[PHN Number]

Today's date

Reason for Letter: [Report or Referral]

Dear Dr. [Name],

Below is an update for [Patient name] for [their] appointment on [Date].

Summary of findings or impressions/plan:

[Summarize the concern and your recommendations in a few concise statements. Use plain language wherever possible, avoiding the use of acronyms. Specify whether this report is for their records only or if a response is requested.]

Actions

[Outline the actions that you have taken, such as provided prescriptions, treatments, and referrals, and the actions required from the family doctor and patient to ensure timely care.]

Referral to another healthcare provider (if provided):

[Specify if you have referred the patient to another health care provider. Include the provider's name, clinic address, and any relevant context to support continuity of care.]

Prescriptions (if provided):

[Provide information about any prescriptions given to the patient, including the type, dosage, and intended use. Clearly indicate who is responsible for managing and prescribing future refills.]

Special notes (if needed):

[Include any relevant notes, such as the patient's preferences for their eye care, resources, or accommodations discussed with patient, etc.]

Please see the full results from the most recent examination below/attached.

If you have any questions or concerns regarding this patient, please do not hesitate to contact me.

Sincerely,

Dr. [NAME], (Prac. ID XXXX-XXXXX)

Clinic information:

Hours of operation
Emergency appointments
Unique or new services for patients

Questions about optometry scope of practice and available coverage?

Visit <https://optometrists.ab.ca/for-health-professionals/working-together>