



The Legacy Review

A structured medication history and interpretation service for complex patients

The Legacy Review is for patients with significant medication histories across multiple prescribers - where the picture is unclear, trials have failed for uncertain reasons, and repeating past mistakes carries real clinical cost.

It produces two documents: the Legacy Report (the backwards look) and the Medication Portrait (the forwards look). They can be commissioned together or separately.

WHEN TO REFER

- Multiple prescribers involved and no single clinician holds the complete picture
- Repeated treatment trials with unclear or inconsistent outcomes
- Patient reports medications "didn't work" but the clinical detail is thin or undocumented
- Unexplained treatment failures, adverse events, or significant side effect burden
- Patient carries strong views about medication that are shaping what is possible
- Prescriber is new to the patient and wants a clear, independent baseline before starting

WHAT IT INVOLVES

RECORDS AND DOCUMENTATION

- MyHealth Record and SafeScript review
- Health summaries, discharge letters, specialist correspondence
- Reconciliation of all medications - names, doses, durations, prescribers
- Documented adverse events, intolerance notes, prescriber comments
- Identification of gaps, inconsistencies, undocumented periods

PATIENT INTERVIEW

- Patient's own account of what worked and what didn't
 - and why
- What they understood about each medication at the time
- Current beliefs, fears, and attitudes toward medication
- Practical factors - adherence, routine, support systems
- What they are and are not willing to try again

WHAT YOU RECEIVE - THE LEGACY REPORT

The Legacy Report is structured, referenced, and written for a clinical audience. Ready for your records and designed to travel with the patient.

- **Reconciled medication history** Every medication - documented with dates, doses, prescribers, duration, and recorded response. Discrepancies between records and patient account are noted and examined.
- **Treatment failure analysis** The critical distinction between genuine failures and pseudo-failures - trials inadequate due to subtherapeutic dosing, insufficient duration, poor adherence, drug interactions, or untreated comorbidity.
- **Patient-specific risk profile** The actual risks for this person - their family history, comorbidities, physical health, prior adverse events, pharmacogenomic factors. Not generic contraindications.
- **Documented contributors to past failures** Where the review uncovers likely reasons a trial did not succeed - named, documented, and where possible evidenced.
- **Opportunities to reassess apparent failures** Where a previous trial was not a proper clinical trial - wrong dose, wrong duration, wrong context - this is identified. Re-trial with proper parameters may be recommended.
- **Co-morbidity summary** A concise picture of the conditions and factors that bear directly on prescribing decisions for this patient.



WHAT YOU RECEIVE - THE MEDICATION PORTRAIT

The Medication Portrait is the second output of the Legacy Review - and the one that travels furthest. Where the Legacy Report looks backwards, the Medication Portrait looks forwards.

- **Patient factors and beliefs** What this person thinks and feels about medication - their fears, their hopes, what they trust, what they have been told that has stayed with them.
- **Practical traps specific to this patient** The things that will derail treatment if not planned for. Examples: constipation history with impaction risk, family history of BPAD and antidepressant manic switch risk, adherence patterns and supports already in place.
- **Coaching given and resources linked** Any coaching or education provided during the review that is relevant going forward - documented so the patient does not have to receive it again from a new clinician.
- **Prescribing guide for future clinicians** A section written for whoever next treats this person. What to know before prescribing. What to ask. What to watch for.

WHAT THE LEGACY REVIEW GIVES YOU, PRACTICALLY

- Walk into the first appointment already holding the patient's medication story
- Documented evidence for your medico-legal position on complex prescribing decisions
- A clear record of what has been genuinely tried and what is still available
- Protection against repeating failed or harmful trials
- A patient who has been heard - therapeutic alliance starts on firmer ground

For complex cases, a warm handover is offered and recommended - a brief call to walk through key findings before you act on the report.

PRICING AND SCOPE

The Legacy Review is a bespoke service. Scope and pricing are agreed before any work begins - no surprises.

The Legacy Report and Medication Portrait can be commissioned together as a full Legacy Review, or separately where only one component is needed.

Concierge support - full coordination across people, systems and supply - can be added to any Legacy Review where the situation requires it.

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