

Preparing for a Doctors Appointment



Contributed by Lakes Region
Community Services and BDS
Nurse Case Manager Pilot Project

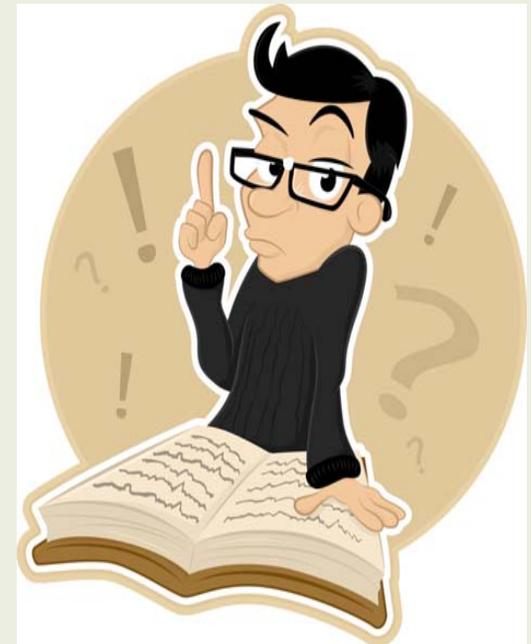
Know the Reason for the Appointment!

TYPES OF APPOINTMENTS

- Initial appointment with PCP or Specialist
- Acute illness or injury
- Follow up appointment
- Physical Exam (PE)

GRAB AND GO BOOK SHOULD GO TO EVERY APPOINTMENT AND INCLUDE:

- Release of information and letter
- *Current* Medication list
- Current consent for treatment
- Physician's order form
- Guardianship information/documentation
- Health Record
- Insurance Cards
- Face Sheet





Initial Appointment with a New Provider

Information you may need

CURRENT MEDICAL HISTORY

List of diagnosis, when diagnosed,
Current medications, diet restrictions, immunization history

PAST MEDICAL HISTORY

Significant medical problems from past including injuries, treatments/surgeries, serious illnesses, hospitalizations

Information you may need

SIGNIFICANT HISTORY

Medical history (i.e. diabetes, hypertension, cancer), history of chemical/physical abuse

GUARDIANSHIP INFORMATION

Bring documentation

COPIES OF TESTS

CT scans, or other diagnostic tests may be needed when seeing a specialist. Call ahead to make sure you bring what is needed to the appointment.

Initial Appointment with a New Provider

These appointments are scheduled well in advance, DO NOT wait until the day before to prepare!

Who is responsible for preparing information?

Manager or designee assigned by manager

Finding information..

Health Record

Central File (past history)

Service agreement

Resource Coordinator

Staff, providers, DSPs

Nurse, Family



Questions ?? Call ahead...

Ask if you need to bring copies of test results, ask what tests may be done, let them know if there is a guardian or any special needs, get directions if needed!

Appointment for an Acute Injury or Illness

EXAMPLES

- Ear ache, Toothache, Fever/cough
- Injured ankle or wrist from fall
- Skin burn from coffee spill
- Cut needing stitches

WHO DECIDES WHEN OR IF INDIVIDUAL SHOULD BE SEEN?

Residential, Day program, Home providers

Call Nursing

Discuss whether individual needs to be seen by a doctor

Discuss where they should be seen

(PCP vs. ER)

WHO SHOULD TAKE INDIVIDUAL ?

- Should be someone the individual trusts and is comfortable with
- Should be well informed of reason for appointment
- Should be med trained



Appointment for an Acute Injury or Illness

INFORMATION NEEDED AT THIS APPOINTMENT

Type of illness- description of symptoms, onset, and treatments tried so far

- Are symptoms improving or worsening in last 24 hours?
- Data such as blood sugars, vital signs, seizures, behavior changes, recent medication changes- depending on problem.

Type if injury- description of how it happened, when it happened

- Is there pain? Is pain worsening/improving?
- Was treatment given? Result?

WHERE DO YOU FIND THIS INFORMATION?

- DSP, Residential Staff, Family
- Daily notes, health notes
- Treatment sheets, Med logs
- Incident report, Injury reports



Appointment for a Follow Up

ORDER CHANGES

- Be familiar with recent changes
- Bring copy of last order change
- Be prepared to review changes with the Doctor

TRACKING SHEETS

- Provide data on: (examples)
 - Blood sugars, vital signs, I&O
 - Oxygen saturation readings, seizures
 - Sleeping patterns, falls

BEHAVIOR, INJURY OR SEIZURE REPORTS

- Information can be gathered and a written summary brought to the appointment
- Do not bring copies of incident reports.

CURRENT STATUS

- Be prepared to discuss how the individual is doing. Are further changes needed?
- *This discussion must be based on data/facts taken from the flow sheets, and not on personal opinion.*

Discuss with manager or nurse so you have a clear understanding of what will be relayed to the doctor, and the goal is for the appointment.

Appointment for a Follow Up

EXAMPLE

“SAM” was experiencing an increase in seizures. A medication change was made by the neurologist.

The physician's orders included:

Follow up in 3 months, lab work/drug level prior to appointment

The follow up appointment is later this week. What do you need to do to be prepared for this appointment?

What information do you need to bring with you?

Where would you find the information?

Annual Physical Exam

PREPARE INDIVIDUAL AND YOURSELF FOR THE APPOINTMENT

- Don't hesitate to make phone calls for information you need: (examples)
 - Call clinic if you have questions about possible tests or screenings you may need to prepare individual for (i.e. vision, hearing screenings).
 - Call your program nurse- inform her/him of upcoming appt; ask if there are any concerns or questions that need to be brought to doctor's attention.



CURRENT HEALTH STATUS

- Be familiar with any changes in last year.
- Look at Health Review Checklists (handout) for this information.

Annual Physical Exam

MEDICATIONS

- Bring **CURRENT** medication list: Review all medications from all providers.
- Request renewal orders and new prescriptions for medications ordered by PCP only
- Medications ordered by specialists should not be renewed by PCP



ANNUAL HEALTH SCREENING GUIDELINES (handout)

- What are these?
- These screening tests should be discussed with team/guardian prior to a physical exam appointment.
- If there is question about whether a test should be ordered- request that the doctor contact the guardian. Staff should not make these decisions!

Making and Keeping Appointments

Making Appointments

- Who is responsible for scheduling medical appointments?
Example: 3 or 6 month follow up that needs to be scheduled in future-
- Who is responsible for scheduling?
- How is information documented and communicated when an appointment is scheduled?
Each program should have system to keep track of upcoming appointments.

If you are not sure, talk to your manager!



Making and Keeping Appointments

Keeping Appointments

- Avoid missing appointments by:
 - Plan in advance, not the same day **(this is the managers responsibility)**.
 - Time management
 - Plan ahead, give yourself extra time for unexpected delays.
 - Aim for arriving 10 –15 minutes prior to the scheduled appointment time.

Rescheduling

- When is it okay to reschedule?
- Who makes the decision to reschedule?
- Who needs to be informed of the change?
- If you are going to reschedule:
 - What considerations are needed?
 - Check calendar for other meetings, appointments before setting another appointment.

