



Preparing for the Healthcare Appointment

BQIS Fact Sheets provide a general overview on topics important to supporting an individual's health and safety and to improving their quality of life. This document provides general information on the topic and is not intended to replace team assessment, decision-making, or medical advice. This is the second of four Fact Sheets regarding managing appointments.

Intended Outcomes

Readers will understand what information is essential to bring to an appointment.

Readers will understand what needs to be considered in preparing an individual for an appointment.

Definitions

Healthcare Provider: Any licensed physician, nurse, dentist, or clinician who provides evaluations, services, and recommendations to an individual.

Facts

- A healthcare provider may cancel an appointment if a person arrives late, as per their practice arrangements.
- A healthcare provider may discharge an individual from services if there is a pattern of missed appointments.
- It is essential that the person accompanying the individual to the appointment:
 - Knows the individual
 - Understands the purpose of the appointment
 - Communicates on behalf of the individual as needed

Recommended Actions and Prevention Strategies

1. Make sure pre-appointment medication, if any, is available in the home on the day prior to the appointment. These pre-appointment medications may include antibiotics prior to a dentist appointment, anti-anxiety medications prior to appointments or procedures, and/or medications ordered prior to surgery.
2. Take important information to the appointment:
 - Name and contact information of guardian/healthcare representative
 - Insurance cards and photo identification



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- List of current medications and medication history (if available) including medicine that was recently changed, reason for the change, and any problems with medications in the past
 - Medical/surgical history; current tracking sheets, immunization records, and other pertinent information related to the appointment
 - Information/questions provided by the individual's support team including events leading up to the current problem/issue
 - Completed healthcare visit/consultation form as used by the agency, with reason for appointment written on it
 - Contact information, directions, and parking information for the healthcare provider's office
 - List of other current healthcare providers for the individual along with their contact information
 - Name, phone and fax number of a contact person from the provider agency (if applicable)
 - Name, location, phone and fax number of preferred pharmacy
3. Prepare the individual:
- Obtain orders regarding eating or holding medication as needed.
 - Give any necessary routine and PRN (as needed) medication as ordered.
 - Make sure the individual has time to have personal hygiene needs met and time to eat (if allowed) prior to the appointment.
 - Make sure the individual is clean and dressed appropriately in clothing that can be easily removed if needed.
 - Prepare snacks and drinks as needed, especially if it is a long distance to the appointment.
 - Prepare necessary supplies for hygiene needs such as wipes, adult undergarments, and change of clothing.
 - Prepare activities and items to keep the individual occupied in the event you have to wait.
 - Explain what will happen in language appropriate for the individual's level of understanding and anxiety, with input from the support team.
 - Provide desensitization as needed and outlined in behavior support plan.



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- Allow appropriate travel time to prevent rushing the individual. If running late for any reason, notify the healthcare provider's office and let them know of the situation and anticipated arrival time, and verify whether the healthcare provider can still see the individual.
 - Arrive 10-15 minutes early, particularly if this is the first appointment, unless otherwise directed by the provider's office.
4. It is essential that whoever accompanies the individual to the appointment knows the individual, knows what the appointment is for, and understands what to bring to the appointment. Staff should notify their supervisor if they have any questions regarding an upcoming appointment.

Learning Assessment

The following questions can be used to verify a person's competency regarding the material contained in this Fact Sheet:

1. True or false: A healthcare provider will always give a person three (3) chances to make the scheduled appointments.
2. It is important to bring the following to an appointment:
 - A. Insurance information
 - B. List of current medications
 - C. Health history information
 - D. All of the above
3. If you are unsure of the reason for an appointment:
 - A. Go ahead and attend the appointment and the healthcare practitioner will figure it out
 - B. Call someone to get the needed information
 - C. Cancel the appointment immediately



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References

National Caregivers Library. *Getting the most from your doctor*. Retrieved 08/25/2015 from: <http://www.caregiverslibrary.org/caregivers-resources/grp-medical-care/hsgrp-doctors-and-hospitals/getting-the-most-from-your-doctor-article.aspx>

Tinglin, C. C. *Adults with intellectual and developmental disabilities: A unique population*. *Today's Geriatric Medicine*, 6 (3), 22. Retrieved 08/25/2015 from <http://www.todaysgeriatricmedicine.com/archive/050613p22.shtml>

Related Resources

Managing Appointment Series Fact Sheets: "Initial Contact", "During the Appointment", and "After the Appointment"

Managing Appointment Series Checklists: "Initial Contact", "Preparing for the Healthcare Appointment", "During the Appointment", and "After the Appointment"

Health Record Form Medical Appointment Form

Learning Assessment Answers

1. False
2. D
3. B