

Health Appointment Folder

Return folder to health office after running appointment.

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Section	Form	Comments
Middle Section	Health Appointment Table of Contents / Checklist Demographic Sheet Copy of insurance Cards Health Record Physicians Orders / Med Sheet	
Front Pocket	Appointment Forms Other pertinent info (seizure tracking, 450 B's, etc.)	

Staff Checklist

<p>Prepare the person for the appointment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Make sure the reason for the appointment is clear. <input type="checkbox"/> Discuss what is going to happen at the visit. <input type="checkbox"/> Follow any instructions to medically prepare for the visit (for example, pre-medications, fasting, wearing loose and comfortable clothing, need for accommodation for a wheelchair). <input type="checkbox"/> Bring items to keep the consumer occupied, money for a drink or food.
<p>Before you leave make sure you have the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Person's insurance card (Medicare, Medicaid) <input type="checkbox"/> Health Appointment Folder <input type="checkbox"/> Directions to the appointment and money for parking <input type="checkbox"/> Agency on-call information (in case you need to contact someone else in the agency)
<p>When you get to the appointment, do the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> First, check in with the receptionist and introduce yourself and the person you are accompanying. <input type="checkbox"/> State the reason that you are there and any problems the person is having. If the person can speak about their health, encourage and assist him/her to do so. <input type="checkbox"/> Discuss any accommodations the person may need in the waiting room.
<p>During the appointment, help the person and health care professional</p> <ul style="list-style-type: none"> <input type="checkbox"/> If needed, assist the individual during the appointment. Provide information to the health care professional when asked and/or help the individual to answer questions. If you do not know the answers to the questions, refer the health care professional to the other contact people on the health record
<p>Obtain the written results of the appointment and the written recommendations:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Obtain completed Physical Exam Form and Appointment Form and make sure that the HCP's portion of the form is filled out. Write down any information that is given to you that is not on the forms. <input type="checkbox"/> Make sure medications are ordered. Pick up any prescriptions or fax to /PRN Pharmaceuticals. <input type="checkbox"/> Please remember to get signed orders for all prescriptions and treatments. <input type="checkbox"/> Set up next appointment with the receptionist if needed
<p>Bring back all forms, any prescriptions, physician's orders and the appointment care to the appropriate person</p> <ul style="list-style-type: none"> <input type="checkbox"/> ORIGINAL Appointment Forms, Physical Exams and prescriptions should be given to the program manager who will then forward them to the nurse. <input type="checkbox"/> Copies of all appointments within the last 60 days are to be kept in the home file. <input type="checkbox"/> Make sure you have copy of any prescriptions dropped off at the pharmacist and give to the nurse. <input type="checkbox"/> If the prescription was faxed to PRN pharmacy, draw a single line through the prescription, fill out the front of the appointment form stating date, time and who faxed it and give it to the manager. <input type="checkbox"/> Document results of the appointment in Notes and on Medical Flow Record and Medical Log (if applicable) <input type="checkbox"/> Communicate information with other staff/team members by recording in staff communication log <input type="checkbox"/> Put next appointment on calendar.