Health Appointment Folder
Return folder to health office after running appointment.

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Staff Checklist

Prepare the person for the appointment
☐ Make sure the reason for the appointment is clear.
☐ Discuss what is going to happen at the visit.
☐ 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).
☐ Bring items to keep the consumer occupied, money for a drink or food.

Before you leave make sure you have the following:
☐ Person’s insurance card (Medicare, Medicaid)
☐ Health Appointment Folder
☐ Directions to the appointment and money for parking
☐ Agency on-call information (in case you need to contact someone else in the agency)

When you get to the appointment, do the following:
☐ First, check in with the receptionist and introduce yourself and the person you are accompanying.
☐ 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.
☐ Discuss any accommodations the person may need in the waiting room.

During the appointment, help the person and health care professional
☐ 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

Obtain the written results of the appointment and the written recommendations:
☐ 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.
☐ Make sure medications are ordered. Pick up any prescriptions or fax to /PRN Pharmaceuticals.
☐ Please remember to get signed orders for all prescriptions and treatments.
☐ Set up next appointment with the receptionist if needed

Bring back all forms, any prescriptions, physician’s orders and the appointment care to the appropriate person
☐ ORIGINAL Appointment Forms, Physical Exams and prescriptions should be given to the program manager who will then forward them to the nurse.
☐ Copies of all appointments within the last 60 days are to be kept in the home file.
☐ Make sure you have copy of any prescriptions dropped off at the pharmacist and give to the nurse.
☐ 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.
☐ Document results of the appointment in Notes and on Medical Flow Record and Medical Log (if applicable)
☐ Communicate information with other staff/team members by recording in staff communication log
☐ Put next appointment on calendar.

OR-FN-HS-MA-32(11-9-09)