



MANAGING APPOINTMENTS CHECKLIST: After the Appointment

FACT SHEET

Client Name: _____

Instructions: Staff to initial each area as completed. Write down any comments related to the completion of each task in the space provided. Forward or file completed checklist according to agency protocol.

After the Appointment

- _____ 1. Discuss new orders/recommendations with the individual, answer questions, and offer support.
- _____ 2. Return to home, work etc. and be sure to provide food, fluids, medications, and hygiene to the individual. Communicate any new orders as per facility policy.
- _____ 3. Tell the nurse/supervisor of the outcome of the appointment and discuss any new orders/recommendations and upcoming appointments/procedures.
- _____ 4. Take/fax prescriptions to the pharmacy or deliver. Make sure you have a copy of the prescription for the individual's medical record.
- _____ 5. Make sure needed medications or supplies are delivered in the appropriate time frame.
- _____ 6. Notify the prescriber/healthcare provider of any delay in medication/supply delivery and ask whether additional actions need to be taken due to the delay (describe below).
- _____ 7. Copy orders to the medication administration record (MAR) and make sure they are double-checked by another staff person.
- _____ 8. Copy orders for monitoring, observation, treatments, and notifications to a treatment sheet and make sure they are double-checked by another staff person.
- _____ 9. Communicate any new treatments and/or medications to oncoming staff as per agency policy.
- _____ 10. Mark any new appointments or scheduled procedures on the individual's daily calendar.
- _____ 11. Follow agency policy or physician order for monitoring the individual if they were sedated before or during an appointment, including: ambulating with assist and not offering food or drink by mouth until the individual returns to baseline.



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Comments:

Staff Completing: _____ Date: _____



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To be completed by nurse, supervisor, program director, etc.

- _____ 1. Provide staff training for new treatments and/or medications.
- _____ 2. Designate a person to communicate the outcome of the appointment to the support team.
- _____ 3. Make sure the support team addresses any issues/barriers related to carrying out the recommendations.
- _____ 4. Make sure revisions to the Risk Plan are completed as necessary.

Comments:

Staff Completing: _____ Date: _____