



During the 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 third of four Fact Sheets regarding managing appointments.

Intended Outcomes

Readers will understand what to expect during an appointment to a healthcare provider.

Definitions

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

Facts

- Not all healthcare providers are experienced in managing individuals with intellectual or developmental disabilities (IDD).
- Individuals with IDD may need special support during healthcare appointments.

Recommended Actions and Prevention Strategies

1. Checking in and waiting area:

- Check in with receptionist upon arrival to office; introduce yourself and the individual you are accompanying.
- State the reason you are there; encourage the individual to participate as they are able.
- Discuss accommodations needed in waiting room such as a more private space if such arrangement was not made ahead of time.
- Provide information to the receptionist as requested such as insurance information and photo identification.
- Maintain a positive, supportive environment while waiting. Engage the individual in preferred activities as needed.
- If you need to leave the waiting area with the individual for any reason, alert the receptionist and establish a method for him/her to contact you while you are out of the waiting area. Do not leave the individual alone in the waiting room.



HEALTH & SAFETY: MANAGING APPOINTMENTS

During the Appointment

FACT SHEET

2. In the examination room:

- Give the healthcare provider any healthcare visit/consultation type forms or other health related information, and review the reason for the appointment.
- Review with the provider any concerns or questions that you were asked to relay from other team members.
- Help the healthcare provider in communicating directly with the individual. Explain communication accommodations and approaches to the examination that may help the individual cooperate.
- Stay with the individual to provide support and assist with communication.
- Refer the healthcare provider to a contact person in the provider agency, a guardian, or to written information if you do not know the answer to the healthcare provider's question.
- Discuss possible challenges with procedures or the examination with the healthcare provider.
- Help with explanations and provide support as necessary for procedures or the examination. This may include providing diversions or requesting shorter, simpler events or steps with breaks in between.
- Help with transferring and positioning of the individual.
- If the exam or procedure is not completed, make sure the reason for not completing the exam or procedure is documented on the healthcare visit/consultation form along with written recommendations for future steps.
- DO NOT give verbal or written consent for invasive procedures - refer the healthcare provider to the guardian or healthcare representative if the individual cannot give their own consent.
- Help in determining if the exam or procedure is worth doing if the individual expresses discomfort or resistance. If this occurs, refer the situation to the support team for review and discussion. Alert the healthcare provider of the need for discussion and request his/her input in writing.
- Encourage the use of the least invasive procedures possible.
- Discuss with the healthcare provider whether there are any new diagnoses, orders, or recommendations.
- Discuss with the provider the need for him/her to write new orders for medications, instructions for treatments or monitoring required, plus any other recommendations or orders necessary for the management of the health issue on the provided healthcare visit/consultation form.



HEALTH & SAFETY: MANAGING APPOINTMENTS

During the Appointment

FACT SHEET

- Discuss the reason for any new medications and whether there are any special instructions for the medication including times to give the medicine, how to give the medicine, and any anticipated side effects.
 - Discuss when any new medications should begin.
 - Make sure any medications that are to be stopped have specific orders for the discontinuation.
 - If medications are discontinued, make sure these are marked as discontinued, including the date, and then packaged to be returned to the pharmacy.
 - Discuss whether any monitoring/observation is necessary and what would prompt a call or follow up appointment to the healthcare provider.
 - Discuss whether any follow up procedures or appointments are necessary.
 - Ask how the results of any tests will be obtained and/or communicated.
 - Make sure all instructions, recommendations, and orders are written on the healthcare visit/consultation form.
 - Read orders and recommendations back to the healthcare provider to make sure they are legible and understood.
3. Checking out:
- Schedule any follow up appointments, tests, or procedures as ordered prior to leaving the office.
 - Make arrangements for payment or reimbursement as needed.



Learning Assessment

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

1. It is acceptable to do all of the following during an appointment except:
 - A. Help the individual with communication
 - B. Sign consent for a procedure
 - C. Ask questions regarding a new medication
 - D. Help with transferring the individual to the examination table
2. Before leaving the appointment it is important that you:
 - A. Schedule the follow up appointment
 - B. Obtain written instructions and recommendations
 - C. Clarify any new instructions that you do not understand
 - D. All of the above

References

National Caregivers Library. *Getting the most from your doctor*. Retrieved 08/25/2015 from: <http://www.caregiverslibrary.org/caregivers-resources/grp-medical-care/hsgroup-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.todaysgeriaticmedicine.com/archive/050613p22.shtml>

Related Resources

Managing Appointment Series Fact Sheets: "Initial Contact", "Preparing for the Healthcare Appointment", and "After the Appointment"

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



Learning Assessment Answers

1. B
2. D