**PROCEDURE FOR A MEDICAL APPOINTMENT**

### 1. PREPARE THE PERSON FOR THE APPOINTMENT
- **A.** Discuss what is going to happen at the visit
- **B.** 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).
- **C.** Bring items to keep the person occupied, money for a drink or food.

### 2. BEFORE YOU LEAVE, MAKE SURE YOU HAVE THE FOLLOWING:
- **A.** Person’s insurance card
- **B.** List of current medications and dosages
- **C.** The following forms depending on the purpose of the appointment
  - Health Record/Medication History
  - Any agency-specific health/appointment forms
- **D.** Directions to the appointment and money for parking
- **E.** Agency on-call information (in case you need to contact someone else in the agency) and Family/Guardian information
- **F.** Name of the pharmacy, telephone number and directions

### 3. WHEN YOU GET TO THE APPOINTMENT, DO THE FOLLOWING:
- **A.** First, check in with the receptionist and introduce yourself and the person you are accompanying.
- **B.** 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.
- **C.** Discuss any accommodations the person may need in the waiting room

### 4. 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.

### 5. OBTAIN THE WRITTEN RESULTS OF THE APPOINTMENT AND THE WRITTEN RECOMMENDATIONS:
- **A.** Obtain any completed forms required by agency. Write down any information that is given to you that is not on the forms.
- **B.** Pick up any prescriptions
- **C.** Please remember to get signed doctor’s orders for all prescriptions and treatments.
- **D.** Set up another appointment with the receptionist if needed.

### 6. BRING BACK ALL FORMS, ANY PRESCRIPTIONS, DOCTOR’S ORDERS, AND THE APPOINTMENT CARD TO THE APPROPRIATE PERSON.

**If going to the Emergency Room (Hospital)**
- Take the person’s Medication Records, Insurance Card, Health Record and any agency-specific forms.
- Be prepared to tell Emergency Room staff why you are bringing the person to the ER.
- If you have any concerns about taking the person home (or to work/day program) after the visit, tell the emergency room staff and contact your supervisor before leaving the hospital.

Adapted from Massachusetts Department of IDD OR-FN-HS-MA-51(11-9-09)