

HEALTH & SAFETY: MANAGING APPOINTMENTS

“During the Appointment”

BQIS/Outreach 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 is the third of four Fact Sheets regarding Managing Appointments.

Objectives

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

Definitions

Healthcare Provider: Any licensed physician, nurse, dentist, or clinician that requires an appointment and evaluation to provide services and recommendations to an individual.

Facts

- Not all healthcare providers are experienced in managing individuals with intellectual disabilities.
- Persons with intellectual and developmental disabilities 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 reason you are there; encourage person to participate as able
- Discuss accommodations needed in waiting room such as a more private space if such arrangement were not made ahead of time
- Provide information to the receptionist as requested such as insurance information, photo ID
- Maintain positive, supportive environment while waiting. Engage the person in preferred activity as needed

- If need to leave 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.

2. In the examination room:

- Provide the healthcare provider with any healthcare visit/consultation type form, 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.
- Assist in advocating that the healthcare provider communicates directly with the individual. Explain communication accommodations and approaches to the examination that may facilitate cooperation.
- Stay with the individual to provide support and assist with communication.
- Refer healthcare provider to a contact person in the provider agency, a guardian, or to written information if you do not know answer to the healthcare provider's question.
- Discuss anticipated difficulties or resistance with procedures/examinations with the healthcare provider
- Assist with explanations and provide support as necessary for procedures/examinations. This may include providing diversions or requesting shorter, simpler events or steps with breaks in between.
- Assist with transfer and positioning of the individual.
- If exam/procedure is not completed, ensure reason for not completing exam/procedure is documented on healthcare visit/consultation form along with written recommendations for addressing future steps.
- DO NOT give verbal or written consent for invasive procedures—refer the healthcare provider to the guardian or healthcare representative if individual cannot give own consent.
- Assist in determining if an exam/procedure is worth doing in the event 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 use 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 needed monitoring and any other recommendations or orders necessary for the management of the health issue on the provided healthcare visit/consultation form.
- Discuss the reason for any new medications and whether there are any special instructions related to the use of the medication including times to administer, methods of administration and anticipated side effects.
- Discuss when any new medications should begin.
- Ensure that any medications that are to be discontinued have specific orders for the discontinuation.

- 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.
- Inquire how the results of any tests will be obtained and/or communicated.
- Ensure all instructions, recommendations and orders are written on the healthcare visit/consultation.
- Read orders and recommendations back to the healthcare provider to ensure 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

Questions that can be used to verify a person's competency in the material contained in this Fact Sheet:

1. It is acceptable to do all of the following during an appointment except:
 - A. Assist the individual with communication
 - B. Sign consent for a procedure
 - C. Ask questions regarding a new medication
 - D. Assist 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

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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

Outreach Services

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As a service for persons supporting individuals with intellectual/developmental disabilities, Outreach and the Indiana Institute on Disability and Community developed the Outreach Fact Sheet Library. The information provided is designed to enhance the understanding of the topic and does not replace other professional or medical instructions or individually developed plans. For more fact sheets and information, please visit DDRSOutreach.IN.gov and www.iidc.indiana.edu/training.



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