Medical Appointment Check-List for Caregivers and Staff

Getting prepared:

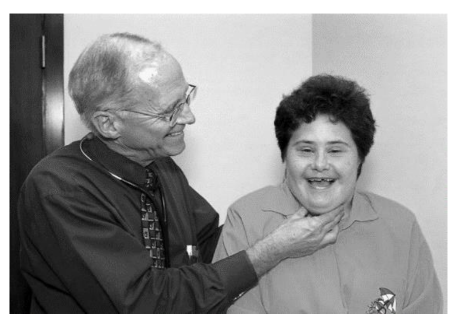
1. Know when and where the appointment is, and be sure your client can access the office.
2. Talk to your client about the appointment, and what procedures will be done during the appointment. Role play their parts of the visit to maximize their participation.
3. Call ahead or visit with the provider to discuss your client and how they prefer to communicate, or any other issues they may have during the appointment. (This is helpful education for the medical provider).
4. The day of the appointment be sure to bring:
   - A list of current medications and dosage.
   - Your client's insurance information.
   - Your client's State ID.

During the appointment:

1. Support your client to be as independent as possible, you can fill in information they forget to include, but let them be the focus person for the provider's questions.
2. Be sure to ask for clarification if the provider uses language your client may not understand. Often times your client will have more questions or information if they fully understand what is being discussed.
3. If there are any medication changes or follow-up needed: ask the provider to write an appointment summary to take home. Most providers will document any changes or follow-up if you just ask!

After the appointment:

1. If there are any changes in medication, or follow up needs: communicate with other people (family, other staff, and your client) to ensure everyone knows what to do.
2. Make sure the summary, or follow up information is put in your client's file, and a copy goes to each person who may need the information.
3. Talk with your client about the appointment. Ask them how they felt about the appointment, and if they have any questions now that they have had time to think about it.



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