

PREPARING FOR A DOCTOR'S VISIT: A Reference Guide for Patients, Caregivers, and Advocates





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We all need to visit a doctor from time to time—some more than others. Being an advocate for yourself or a loved one is one way you can make the best use of your and your doctor's time.

Being prepared for an office visit is the *ideal* way to start. As an advocate, or by having an advocate, you can take charge of your healthcare and partner with your doctor and healthcare team.

This reference guide prepares you or your loved one for an efficient and empowering doctor or hospital visit. Participation in your healthcare is essential to improving your overall health outcomes.



KATHY'S MOTHER had numerous tests done to find out why she was having severe stomach pain, but there were never any conclusions. Nine months from the beginning of her doctor visits, a radiology report was uploaded into the electronic health record (EHR) that diagnosed Angela's mom with pancreatic cancer. She was now, nine months later, in stage 4 pancreatic cancer.

HOW COULD YOU PREVENT THIS SCENARIO FROM HAPPENING TO YOU?



To stay abreast of your or your loved one's healthcare you should engage in five areas:

| **EMPOWER** |

Understand the importance and the responsibilities of being your own patient advocate or serving as an advocate for a loved one.

| **INFORM** |

Understand and know your rights to access your health record.

| **INVOLVE** |

Prepare for your doctor or hospital visit by considering the enclosed checklist.

| **COLLABORATE** |

Understand your financial responsibilities.

| **CONSULT** |

Write down questions to ask the provider or insurance company prior to the visit.





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EMPOWER

UNDERSTAND THE RESPONSIBILITY OF BEING YOUR OWN OR A LOVED ONE'S ADVOCATE

For an efficient and empowering office visit, here are some recommendations to help you prepare.

Your goal is to know as much as you can as a patient, and to actively engage in your healthcare decisions. To do this, you must realize that your visit starts before you step into the doctor's office.

You need to set a personal goal for what you want to achieve from your visit. Is it to solve a health issue? Is it to maintain a healthy lifestyle? Is it to follow up to a chronic condition?

WHAT IS A PATIENT ADVOCATE?

A patient advocate acts on the patients' behalf to make appointments, help with billing questions, pre-authorization of tests or surgeries, take patients to appointments, ask questions during the visits, and talk with family on other related needs. They may also be called Medical Navigators and may be a person or agency/company.

As a consumer of healthcare, the most important person to advocate for you is yourself if you are able.

FINDING A PATIENT ADVOCATE

Many agencies can help you find a patient advocate. Your local senior center, hospital, a counselor or mental health organization, the local Area on Aging, local churches, or public assistance offices may have a list of advocates or agencies offering advocates. The list may contain addresses and phone numbers you can call for more information.

You can also use these resources to advocate for yourself when acting as your own patient advocate. If you are interested in researching more information on agencies that provide assistance to healthcare consumers online, visit:

ShareCare.com

webMd.com

patientadvocate.org

healthwellfoundation.org

AdvoConnection.com

WHAT MAKES A GOOD ADVOCATE?

Having a good advocate is not about having someone else do the work for you; it is about you learning to become an advocate for your healthcare and wellness. Here are a few helpful tips when considering becoming or selecting an advocate.

- Recognize/identify a need
- Time to dedicate
- Access to online resources
- Establish trust
- Check in to make sure the patient/advocate has what is needed
- Help the patient become an advocate for themselves; bridge the gaps where the patient can't advocate for themselves
- Don't be afraid to ask questions
- Encourage the patient to ask you questions, and open up a dialogue
- Respect boundaries—Allow the patient to speak up for themselves while knowing when to interject



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INFORM

UNDERSTAND AND KNOW YOUR RIGHTS TO ACCESS YOUR HEALTH RECORDS

Federal law allows every patient to have access to their health records and to receive copies for a reasonable fee. Many clinics and hospitals provide free copies for summary documents. These include the hospital discharge summary (a document that summarizes your hospital stay), reports about any operations you may have had, history and physical examinations, consultation reports by specialists, medication lists, and instructions for continuing care at home.



“Informed, smart patients are able to open up the conversation. This alone will nurture the relationship with your doctor and create a more dynamic and satisfying experience with the medical system. The responsibility of your health should be shared between you and your doctor. As you work to strengthen your connection, your physician will always do their best to meet you halfway.”

—Sharecare co-creator Dr. Oz is Vice-Chair and Professor of Surgery at Columbia University



INVOLVE

BE PREPARED FOR YOUR MEDICAL VISIT

If you have any questions about the content of your health record, ask your doctor. If you wish to review your entire health record, the health information staff can help guide you through the record to find the information you are interested in reading.

You have the right to access and receive copies of your health records. When asking for copies of your record, you will be asked to sign and complete a “request for information form.” This is required by law to ensure only patients or their legal representative can access the record. To protect the privacy and confidentiality of your records, you will have to make your request in writing and verify your identity to get your records.

Tips for reviewing your health records:

- Request them at the time of care.
- Review for accuracy. Correct the errors before the records are shared.
- Ask for old records.

Some facilities charge a fee for copies. You may minimize the cost by limiting the records you request. Most patients find copies of their outpatient visit summaries, inpatient discharge summaries, laboratory, and radiology results to be useful. The records personnel should be able to help you in selecting the pertinent information. It may take some time for your request to be processed. It is a good idea to ask when you can expect to receive the copies. Also, when asking for a copy of your medical records, make sure you have your photo ID and payment, if applicable.

When preparing for a doctor's appointment, consider the following areas:

What—symptoms, questions, any past medical information

When—before your office visit

Where—digital file, update portal, take photos of prescriptions/supplements, or bring copies in a paper format

Why—to be prepared so you can achieve time efficiency,

How—make copies of test results and other important medical information, such as medication lists. You can also use a CD, DVD, or create a personal health record (PHR). (For more information on how to create a PHR, visit myPHR.com.)

**The enclosed check list offers additional information on how to prepare for your appointment.*



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COLLABORATE

UNDERSTAND YOUR FINANCIAL RESPONSIBILITIES

1. Is this operation or procedure an emergency? How much of it will be covered by my health insurance? If everything is not covered, approximately how much money will I need to pay?
2. If this is not an emergency, how long can I go before I need this procedure? What are the consequences of not having the procedure?
3. If my insurance does not cover all the tests and procedures, what is my co-pay?
4. Is there an alternative test, drug, or procedure that costs less money?

CONSULT

ASK QUESTIONS OF YOUR MEDICAL AND INSURANCE PROVIDER

Ask your doctor and your insurance company these questions:

- Don't be afraid to speak up to question anything that may not be right. Be aware of your rights as a patient and exercise them.
- Let your doctor know how you learn best (reading, listening, or hands-on) so you can receive information in your learning style.
- Schedule appointment times for first thing in the morning or right after lunch, as the waiting times are likely to be shorter.
- Arrive early in case you need to update forms.
- Ask for the doctor's recommendation for websites to research additional information to learn more about your condition and maintain optimal health status for you and your family.
- Ask the doctor for a brochure about your condition.
- Know what symptoms you should be aware of that may indicate the condition is worsening and when to give the office a call.
- Be sure any specialist you see updates the primary physician who oversees your overall health!
- If you think of additional questions after your appointment, call the office and ask them.
- Keep a list of tests performed and crosswalk them with results you receive.





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SUMMARY

You need to be an active member of your healthcare team. The bottom line is that you, the patient, are the most familiar with your body and what it's feeling. Because the time you spend face to face with your doctor isn't very long, you need to be prepared with all your information and a set of questions prior to your visit. If you are prepared, you can actively participate in your doctor's visit. Remember, the doctor is the expert on diagnosing what is wrong with you, but you drive your healthcare.

Being prepared for an office visit can go a long way to help in your or your loved one's healthcare and being an advocate can be gratifying and help you take charge of your healthcare. Remember, you and your healthcare team are partners. Be prepared to participate in your own healthcare and make informed decisions.

OTHER HELPFUL RESOURCES

1. Canadian study by BMC Health Services Research. biomedcentral.com/content/pdf/1472-6963-14-175.pdf
Person-centered care coordinators also could be in charge of operationalizing proactive patient engagement strategies. The study authors identified many methods of engagement, which they grouped under five categories: inform, consult, involve, collaborate and empower.
2. AHIMA How to Request Your Medical Records journal.ahima.org/how-to-request-your-medical-records/
3. HHS <http://healthit.gov/patients-families/faqs/how-can-i-access-my-health-informationmedical-record>
4. Taking Charge of Your Healthcare: Your Path to Being an Empowered Patient" (Consumers Advancing Patient Safety [CAPS]) consumersadvancingpatientsafety.org/caps/programs/taking-charge-of-your-health-care-your-path-to-being-an-empowered-patient-toolkit-introduction/
5. "Communicating with Patients and Families for Smooth, Safe Transitions" (Consumers Advancing Patient Safety [CAPS]) [PDF, 199KB]
6. "Patient Activation Measure® (PAM®)" (Insignia Health)
7. Other agencies with information on patient advocates are:
National Patient Safety Foundation nspf.org
National Association of Healthcare Advocacy Consultants nahac.memberlodge.com
Alliance of Professional Health Advocates aphadvocates.org
Professional Patient Advocate Institute patientadvocatetraining.com
Patient Advocate-Veterans Health Administration va.gov/health/patient-advocate
8. cfah.org/prepared-patient/organize-your-health-care/sharing-medical-information-with-multiple-doctors-your-medical-records?utm_source=CFAH+Digest+5.14.14&utm_campaign=CFAH+Digest+5.14.14&utm_medium=email
9. Burns, K.K, Bellows, M., Eigenseher, C., & Gallivan, J. (2014). 'Practical' resources to support patient and family engagement in healthcare decisions: a scoping review. *BMC Health Services Research*, 14(1), 1-25. Doi: 10.1186/1472-6963-14-175



CHECKLIST:

Before and After a Clinic Visit

DONE **BEFORE A CLINIC VISIT**

- Photo ID (driver's license or other)
- Updated family medical information and personal information (cell/e-mail)
- Insurance Card
- List of medications (name and daily dosage) and supplements (name, brand, and daily dosage)
- List of allergies
- Immunization records (Include questions about possible new vaccinations, such as shingles, pneumonia, flu, etc.)
- Copies of past records (including eye, dental, medical images)
- List of questions to ask (make sure the important ones are at the top of the list.)
- Advocate or note taker (Take a notebook, iPad, or smartphone to take notes. You can also make a guide for taking notes during your visit. This will prompt you to get all you need to know and ask questions if you need more information. Or bring along a friend or caretaker if you need an extra pair of eyes and ears with you.)
- Copay if required (credit card or cash for payment)
- Other doctors' contact information
- List and dates of all tests performed
- Results of recent tests performed from other health providers (Specialist, diagnostic test providers)
- Keep a symptom journal. Write down when your symptoms started, how often you experience symptoms, what makes them worse, and what you have been doing to deal with the symptoms.
 - What hurts you?
 - Where does it hurt?
 - How often/long does it hurt? For example, does it hurt all day long or only some of the day?
 - What makes it better and what makes it worse? This includes medications, activities, and food.
- Make sure you do all of your blood work at least three to five days prior to your visit so your doctor will have all the information needed for your visit.
- Medical Power of Attorney

DONE **AFTER A CLINIC VISIT**

- List of medications
- Copy of visit summary
- Prescriptions received
- Notes taken during visit
- Follow-up appointments
- List of tests with results pending
- Review all patient information (visit summary, patient portal, etc.) for accuracy
- Obtain copy of test results if not on visit summary
- Talk with doctor's office about any outstanding test results
- Sign up for patient portal access (if available)
- List and dates of all tests performed
- Results of recent tests performed



CHECKLISTS:

Before Going, Before and After Leaving the Hospital

DONE BEFORE GOING TO THE HOSPITAL

- Photo ID (driver's license or other)
- Insurance card
- List of medications
- List of allergies
- Immunization records
- Copies of past records
- List of questions to ask
- Advocate or note taker
- Copay if required
- Doctors' contact information
- Take copies of Advance Directive documents (living will, healthcare power of attorney)
- Contact information for individuals you may need to contact during your stay
- List and dates of all tests performed
- Results of recent tests performed

DONE BEFORE LEAVING THE HOSPITAL

- List of medications
- Discharge instructions
- Prescriptions received
- Follow up appointments
- Doctors' contact information
- List and dates of tests performed still waiting for results
- Review records obtained for accuracy
- Obtain information for signing up for patient portal (electronic access)
- Obtain copy of test results if not on visit summary or in patient portal
- List and dates of all tests performed
- Results of recent tests performed

DONE AFTER LEAVING THE HOSPITAL

- Mark off as results received from outstanding test results
- Obtain copies of results returned post discharge
- Review all patient information (visit summary, patient portal, etc.) for accuracy—contact hospital to correct any errors
- Call your doctor if outstanding test results are not received in one week
- Sign up for patient portal access (if available)
- Place discharge instructions in location where you can review them daily