



Medical Note~Taking

MANUAL FOR NOTE-TAKERS

Partners in the development of senior-friendly neighborhoods



Supported by a grant from Advisory Neighborhood Commission 3/4-G

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Acknowledgments

The Medical Note-takers project is the result of a partnership between the Northwest Neighbors Village (NNV) and Iona Senior Services (Iona). NNV is a community network of support services, empowering residents of northwest DC (Chevy Chase, AU Park, Tenleytown, Forest Hills and North Cleveland Park) to remain independent at home as long as it is safe to do so. Using a volunteer provided approach, our aim is to help our neighbors age in place safely, comfortably, and confidently in their own homes, remaining in the community they love. NNV is part of the Senior Services Network, supported by the DC Office on Aging.

Iona is a 35-year-old nonprofit whose mission is to support people in the Washington, D.C. metropolitan area as they experience the challenges and opportunities of aging. We educate, advocate, and provide community-based programs and services to help people age well and live well. Iona is also part of the D.C. Office on Aging Senior Services Network.



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Special acknowledgement to Avenidas in Palo Alto, California (www.avenidas.org) for sharing materials used in their Medpals program.

Thanks to Emily Ennis, MSW, LGSW for her assistance in editing this manual.

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This handbook is not intended to, nor does it replace professional health or social services. The expertise of a professional service provider should be obtained for any medical or psychosocial assistance that might be needed. This handbook is made available to *volunteer* note-takers at NNV with the understanding that the Medical Note-taking Program is not engaged in rendering medical or other professional services or advice. Members requiring such assistance are encouraged to consult with NNV staff.



Why Medical Note-takers?

NNV members have requested assistance from medical note-takers to document the information given to them during medical appointments. Often the medical information is overwhelming and next steps are lost in the communication. Members have expressed a need for someone to accompany them to appointments and take notes for later reference and dissemination to family or other individuals designated by the member. Inaccurate information can lead to:

- Poor recall, leading to missed critical tests, appointments
- Lack of communication to primary support system, leading to missed opportunities for family and other assistance
- No written documentation, leading to misunderstandings for patient and second opinion medical professionals
- Poor decision making
- Drug contraindications

Trained, interested and available volunteers with medical note-taking skills will provide critical support and information to members who need extra support at medical appointments. Note-taker involvement will help prevent missed doctors' appointments and medical tests, ensure there is communication among the member's support network, and help members stay in charge of their health care.

Why Medical Appointment Notes Matter: Medical Care Today

The average life span today is almost 10 years longer than it was fifty years ago. This is due in large part to advances in medical science, such as control of infectious diseases and advances in cardiac care. Thanks to Medicare, most older adults in the U.S. have access to health care. There are many resources available to help older adults stay healthy and live longer.

But aging in today's health care landscape also presents challenges. While medical science has advanced, the ability to cure serious chronic diseases such as Alzheimer's disease or arthritis still eludes the medical profession. These chronic diseases have a major impact on independence and quality of life.

The delivery of health care has also changed. According to the National Center for Health Statistics, the average medical appointment lasts 19 minutes. That's not a lot of time to get questions answered, much less to write down the doctor's diagnosis and suggestions for next steps. In addition, many older adults are referred to numerous specialists. Each of these doctors may order tests, and prescribe medications and procedures. The primary physician may not have the time to sort through all the test results and orders and then coordinate care.

With all these challenges, it helps to have another set of ears at a medical appointment. Writing down what the doctor has to say, including feedback about symptoms of concern, tests and procedures ordered, and when the patient should check back in with the doctor, is a major contribution to a successful visit. As accurate recorders of what happens in a medical appointment, note-takers play a very important role in helping NNV members navigate today's complex health care system.

Volunteer Medical Note-taker Job Description

Summary of Qualifications

The Volunteer Medical Note-taker should have an interest in serving older adults in a medical setting. Participants should be willing to provide exceptional customer service, including employing the use of active listening skills, diplomacy, tact, and patience.

Note-taking requires organizational skills, attention to detail, familiarity and some understanding of the medical appointment environment. Volunteer medical note-takers should have normal hearing and eyesight, and should be able to walk unattended.

The Role of a Note-taker

Note-takers are *recorders* of the communication transactions that occur between the medical provider and the member.

In their role, note-takers accompany members to various appointments and act as another pair of ears. Note-takers meet with the member prior to accompanying them to an appointment, and help to prepare them for the medical visit. The preparation is called a *pre-visit conversation* and helps to empower the member to act on their own behalf while in the medical appointment. The note-taker responsibility focuses on the communication transactions between the medical practitioner and the member.

Medical note-takers record what they hear. Note-takers use their listening skills and ask for clarification when appropriate. The challenge for note-takers is to stay in the listening and recording role and not crossover to the role of a medical advocate.

Medical advocates play a more time-consuming, comprehensive role with the member and spend a great deal of time getting to know the member's medical situation and needs. Advocates research and gather information and help the member to make the best decision possible. As a result of gathering information, advocates advise the member and act on their behalf with doctors, hospitals, insurance companies, medical supply vendors, etc. The advocacy role may include going to medical appointments and recording notes, similar to the role of the note-taker, however, the advocate's role and relationship is a deeper one and is often used when the member needs an intervention to support their interests.

Volunteer Medical Note-taker Job Description, cont'd

Volunteer Background Checks

As is customary, all volunteer medical note-takers must undergo a criminal background check by IntelliCorp, a company used by Iona Senior Services and Northwest Neighbors Village to vet their volunteers. Medical note-takers who drive must have a valid driver's license, appropriate automobile insurance, and a background check of their driving records.

The Volunteer Note-taker's relationship with the Member

Do...

- ▷ Listen carefully and patiently to the member; give feedback that lets them know you heard what they said;
- ▷ Empathize with the member. Empathy embodies the ability to sense the emotions of others; it builds rapport and trust, and is particularly helpful in the realm of supporting those who are learning how to advocate for themselves;
- ▷ Arrive on time when meeting with the member; build in a little extra time for conversations and listening.

Don't...

- ▷ Offer medical advice to the member; this is tempting at times; refer to the training notes regarding how to answer questions such as "What would you do in my situation?"
- ▷ Judge the decisions made by the member as a result of the appointment;
- ▷ Share any information about the member or the member's medical condition with anyone except those designated by the member.

The Medical Note-taking Process

Part I

Preparing for an Appointment --- The Pre-visit Conversation

Purpose

Preparation for the pre-appointment visit supports the relationship/ conversation between the note-taker and the member, and ultimately empowers the member. This conversation may take place in person, or by phone when a face to face meeting is not possible. During the pre-visit conversation, the preview checklist will help guide the note-taker anticipate what may take place during the appointment. Additionally, the member has the option and may be encouraged to use an informational health/medication record sheet (*see Patient Guide for NNV Members).



The Medical Note-taking Process

Part II

Preview Checklist

Review appointment time, date and place. Consider your own calendar. Do you have activities scheduled before or after this appointment that might cause you to be rushed? If so, can you reschedule them or should you ask that another note-taker be assigned?

Review importance of the member introducing the note-taker to the physician and explaining that the note-taker's role is to keep a record of physician patient conversation AND keep the member's loved ones updated on patient's health

Purpose of Appointment: goal or reason for visit

- ▷ New problem vs. continuing problem?
- ▷ Description of symptoms
- ▷ Tests/labs
- ▷ Medication review
- ▷ Other concerns or questions

After visit how does member want notes handled? *

- ▷ Prepared notes delivered to member
- ▷ Prepared notes delivered electronically to member
- ▷ Time frame for delivery

* See Appendix A for Medical Appointment Record form.

The Medical Note-taking Process

Part III

During the appointment

- The member should inform the reception staff and the doctor that he or she has a medical note-taker with them.
- The note-taker should accompany member to the exam room for initial discussion, excuse oneself for the examination and return for the post-exam discussion. This may involve waiting in the hall-way outside the examination room.
- Have note taking materials (notebook and pen, tablet, ipad, etc.) ready to go.

If possible, ask any questions necessary for a clear record and repeat key information back to the doctor before the appointment ends.

However, do not participate in the communication between the doctor and member as a family member might; rather, focus on documenting the communication between the doctor and the member.

If the member appears to be having difficulty understanding the information presented or asking key questions, note this. Remember that your role is not one of medical advocacy.

After the appointment

Write up notes as quickly as possible (no more than two days after the appointment) and deliver to member and/or family members through the method agreed on during the pre-visit conversation.

Use the medical appointment record form as a template (Appendix A)

Report any concerns about the member to NNV Medical Note-taker Program Coordinator at (202) 777-3435.

The Medical Note-taking Process

Challenging Situations

Physician does not want a medical note taker to participate

- Explain that your role is to take notes to help the member remember what the doctor said and/or to record the information for the member's family.
- Clarify that you do not expect to be present during the exam
- Ask member how he or she would like to proceed

Member does not seem to understand information provided

- Ask the doctor any clarifying questions you may have.
- Make a note of any issues or concerns about the member.
- After the appointment, ask the member what they understand or do not understand about the information provided.
- Report any concerns to NNV Executive Director.

Member receives news of a life-limiting or otherwise serious diagnosis

- Provide support and reassurance as appropriate during and after the appointment
- Try not to lose track of your note-taking role – the information you record will be very important for next steps
- After the appointment ask the member how you can be of assistance.
- Report any concerns to NNV Executive Director.

Member asks for additional support

- NNV Executive Director or designated professional working with NNV will review the concerns of the member.
- Member will be supported by the appropriate professional, arranged for by NNV staff.
- NNV staff will follow-up with member to ensure the coordinating connections have been made and make offer to support further, if appropriate.
- Member feels unwell en route to appointment.

Confidentiality and HIPAA

Medical note-takers are participating in medical appointments with the consent of the member/patient. Nevertheless, a relationship with a health care provider is normally a private matter, and there are legal and ethical considerations to protecting that privacy.

HIPAA (Health Insurance Portability and Accountability Act) requires health care providers to maintain the confidentiality of health information except under specific circumstances. Note-takers are not health care providers, and therefore HIPAA does not place any requirements on the note-taker. Doctor's offices typically ask patients to sign a form designating individuals to whom the doctor's office can release information. Because note-takers are present during the appointment and should not be asking for or receiving information once the appointment is over, it should not be necessary for the member to complete any paperwork for you to be present during the appointment. However, the medical provider's staff may ask the member to sign a HIPAA release.

Confidentiality: Confidentiality refers to maintaining the privacy of personal information, usually as an ethical obligations. For example, medical professionals, social workers, counselors, clergy and attorneys, among other professions, have codes of ethics that require them to maintain confidentiality under most circumstances.

In addition to professional codes of ethics, many volunteer programs, including NNV, require volunteers to maintain confidentiality. See NNV's privacy policy. Note-takers should be careful about transporting their notes, storing papers (and destroying them when no longer needed), how they keep any files on their computers, and emailing notes, even if the member has requested this.

Appendix A—This template is a guide for writing up notes after an appointment. All of the categories may not apply to every visit.

Medical Appointment Record

Member:

Medical Provider:

Phone Number:

Facility:

Appointment Date:

Note taker:

Goal of Visit:

Problems addressed:

Recommendations:

Plan of Care: Instructions

Tests, procedures

Updated Medication List/Instructions

Prescriptions:

Changes:

Other Comments: