



Bellingham
At Home



MEDICAL NOTE TAKING: Manual for Note Takers

Aging well is a team sport

Acknowledgments

Volunteer Health Advocacy Committee

Bellingham At Home Leadership Council

Volunteer Health Advocacy Committee Members

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Copyright and Limitations of Use

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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 Bellingham At Home 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 the VHA Coordinator.

Confidentiality and HIPAA

Medical note takers are participating in medical appointments with the consent of the member. 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, 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 maintain the privacy of person information, usually as an ethical obligation. 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 BAH, require volunteers to maintain confidentiality. See BAH'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.

See attached form.

A summary of HIPAA guidelines is available in the Bellingham At Home office, located at 315 Halleck St, Bellingham, WA 98225.

Why Medical Note Takers?

BAH 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. We support:

- Recall, avoiding missed critical tests, appointments
- Communication to primary support system, for opportunities for family and other assistance
- Written documentation, leading to understanding for patient and second opinion medical professionals
- Positive decision making
- Awareness of medication and unwanted [WORD?]

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. 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 order 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 BAH members navigate today's complex health care system.

Volunteer Medical Note Taker Role 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 member 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.

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 advisor.

Volunteer Background Checks

Those interested in being a Volunteer Health Advocate must be a volunteer for Bellingham At Home prior to taking part in the Health Advocacy program. All Bellingham At Home volunteers are required to undergo a criminal background check before being approved.

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, but the volunteer's role is always supportive only.
- 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.

Preparing for an Appointment – The Pre-visit Conversation

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 and 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.

Medical Note Taking Pre-Visit Checklist

Member Information

Member name: _____

Member's address: _____

Phone number: _____ Pick Up Time: _____

Medical Provider Information

Medical Provider: _____

Medical Provider's address: _____

Phone number: _____ Appointment Time: _____

Recipient Information

Does member wish for others to be notified of appointment and note taking?

Yes No

Name: _____ Relationship: _____

Email address/Address: _____

Name: _____ Relationship: _____

Email address/Address: _____

Checklist

Members should bring the following to the appointment:

- Medical insurance card(s)
- Identification
- Money for co-pay
- Money for parking (if applicable)
- Medication list
- List of diagnoses

Preparing for a Medical Appointment

This is a tool which can act as a checklist for members to go through before, during, and after appointments. This can also be modified to meet the member's needs and/or preferences.

Questions to ask and steps to take for a successful appointment:

1. What is the reason for this appointment?
2. Gather supplies, contact Volunteer Health Advocate, and arrange transportation (in advance). Be sure to bring a medical notebook that contains medications, allergies, and any other pertinent information to the appointment.
3. List all medications and vitamins you are currently taking, along with dosages:

Medication	Dosage	Compliance

4. Report any problems you've had taking your medications as prescribed (dosage, timing, side effects, with or without food, etc.)
5. List any symptoms or changes you've noticed since your last visit. Be specific as possible.
6. What questions or concerns do you want to discuss with the doctor at this appointment?
7. Arrive on time, or early. Although the doctor may be running late, be sure the patient is not.
8. Give the doctor a copy of the list of concerns/issues/questions you have at the beginning of the appointment.
9. Make sure to have an accurate understanding of any follow-up needed after the appointment.

Preview Checklist for Medical Note Takers

Review appointment time, date, and place. Consider your own calendar. Do you have activities schedule 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 the physician patient conversation, AND keep the member's loved ones updated on patient health if the member requests.

Purpose of appointment: goal or reason for visit

- New problems vs. continuing problems?
- description of symptoms
- Tests/labs
- Medication review
- Other concerns or questions

After visit, the member will review the notes taken. It is up to the members to decide if they wish to have family members informed. Member may request that the note taker reviews the information AFTER the doctor's appointment.

During the appointment

- The member should inform the reception staff and the doctor that they have a medical note taker with them.
- The note taker should accompany the 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 hallway 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 intervention or advice.

After the appointment

Write up notes as quickly as possible and deliver to member immediately after the appointment.

Taking PART in appointments:

P=Prepare: Take the time to write an agenda for the appointment including the reason for the visit and any questions/concerns (**see: At the Doctor's Office: Questions to Ask**) Bring up the questions/concerns at the **beginning** of the appointment and, if possible, give a written copy to the medical professional. The professional may not be able to address everything, but you can at least go over the most important concerns.

A=Ask: Do not be afraid to ask for clarification if something the medical professional says does not make perfect sense at the moment. The member will not be able to properly follow the professional's recommendation if the instructions were not clear.

R=Repeat: At the end of the appointment, take the time to briefly paraphrase what was discussed and decided upon. This step allows the medical professional to correct any confusion before the member leaves the office.

T=Take Action: For this step to be successful, the member should be realistic and honest about what they are and are not willing/able to do. There may need to be a modification to a recommended treatment plan in order for the member to be successful.

Tips for Volunteer Health Advocacy:

- Go into the appointment with a clear idea about the reasons the member is there and their goals for this appointment.
- Bring a list of questions and the member's prescription medications.
- List any symptoms or problems the member wants to discuss.
- Be prepared to excuse yourself/step out of the room to preserve the member's dignity and physical privacy when/if a physical exam or some other maneuver is being done by the medical professional which might expose them. However, if a member requests that you stay in the room, you may do so if you are comfortable.
- Before leaving, confirm a summary of what happened with the doctor, including recommendations for next steps.
- Make sure your understanding is correct and write that down.
- Never rely on your memory.

At the Doctor's Office: Questions to Ask

Prior to a doctor's appointment, we encourage you to have a discussion with the member to determine any pertinent health issues the member may be having. Take note of these – members may forget to bring issues up during their appointment, so you will serve as a second set of eyes and ears in these situations. Following are example of questions you may want to ask your member:

- What is the purpose of this visit?
- Having any pain? Level and location of pain?
 - Level of pain: 0 (no pain) – 10 (severe pain)
- Difficulty walking?
- Difficulty sleeping? Nightmares?
- Hearing problems?
- Need vision exam?
- Issues with urination?
- Need annual exams such as mammogram?
- Colonoscopy?
- Eating problems or discomfort during eating?
- Normal bowel movements?
- Need to see a podiatrist?
- Driving issues or problems?

The Medical Note Taking Process in 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 to the member that you do not expect to be present during the exam.
- Ask member how they would like to proceed.

Member does not seem to understand information provided

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

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 the VHA Coordinator.

Member asks for additional support

- VHA Coordinator will review the concerns of the member.
- Member will be encouraged to contact the appropriate medical or social professional, assisted by the Volunteer Health Advocate.
- VHA Coordinator will follow up with the member to ensure the coordinating connections have been made or make offer to support further, if appropriate.
- If a member feels unwell en route to appointment, the Volunteer Health Advocate will take steps to assist their return home or to a medical facility, as appropriate.

Consent Form for Volunteer Health Advocacy

Member name: _____

Date & time: _____

Health advocate name: _____

I give my full consent to allow a Bellingham At Home Health Advocate to assist me by taking medical notes during my appointment with the physician's approval. I understand the Health Advocate gives no medical advice or treatment recommendations.

Member's signature

Health Advocate's signature

This form has been developed by the Health Advocacy Committee, Bellingham At Home (BAH), a senior support organization, to be used only for BAH members, their chosen health advocates, and their physicians and other medical personnel. Bellingham At Home serves under the Whatcom Council on Aging, who assume no responsibility for health outcomes. Our aim is to support the patient and doctor relationship. All member disclosures are held in the strictest confidence.

Medical Note Taking Form

Member's name: _____ **Date & time:** _____

Physician's name: _____

Health advocate's name: _____

Purpose of visit: _____

Consent Form signed & offered to physician: ____ Yes ____ No

The Health Advocate may step out of the room during physical examination

Summary of visit:

(Add to notes on back)

Medical changes: e.g., new medication, new diagnosis, new treatments, new recommendations

Clarifying questions for physician: e.g., Do you have any more questions for the doctor? Do you feel completely clear about the doctor's recommendations?

Follow-up appointments:

Treatment recommendations (if appropriate):

Read back to physician: ____ Physician's initials

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Bellingham At Home is compliant with The Health Insurance Portability and Accountability Act of 1996 (HIPAA), Public Law 104-191. We do not retain copies of this form or any other medical information on our members, and details of member's private health information will not be shared.

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