



Patient Advocate Checklist For:

Name of Patient _____

An advocate is not a Health Care Proxy and can not make decisions for the patient. The advocate should know who the Health Care Proxy is and who to call in case of emergency.

Complete the following information and be sure your health care provider, family and advocate have a copy. Remember to discuss this information with your advocate or immediately upon completion.

My Advocate(s)

Name _____ Name _____

My patient advocate duties will / can include (check all)



The following information is from the book

Family Centered Patient Advocacy, A Training Manual © Pulse CPSEA 2006 g 0 G [() TJ ET Q q 0.00000912 0 612 792 re

Helping the Patient Prepare for the Doctor

It is important to prepare for doctor visits as far in advance as possible. Such preparation includes keeping track of all medication the patient currently takes, getting any required forms in advance for the patient to fill out at home, ensuring the patient will have enough time with the doctor, helping the patient to see the doctor in a group practice or clinic with whom he or she is most comfortable, patient is and remains uncomfortable speaking with the doctor, encourage the patient to change doctors.

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Ask the patient whether he or she would like you to be in the exam room. If the patient does not want you there, it will be up to you and the patient to remind the doctor that you need to be present after the exam to help ask questions and note the answers. It is best for the patient and patient advocate to make the arrangements before the doctor visit.

If the patient is not physically able to dress or care for him or herself, you may need to discuss the patient's concerns with the nurse and be available to help. Why is this? How do you convey respect and sensitivity and get the relationship off to a good start?

Prepare the patient appropriately for the doctor visit, allowing plenty of time for waiting, the exam, any required testing, and filling prescriptions.

Tips for Choosing a Doctor

Research physician profiles by state. Some states maintain lists that include a few background information, but beware: the information is not always objective because it is reported by the doctors themselves. It also may not be current.

Ask doctors you respect whom they would see if they or a family member were the patient.

Ask friends and family members whom they have used and would recommend. Some prefer a good bedside manner and some prefer a doctor who has been around for years. What matters most? If you know someone who works in the hospital which doctor is associated, as his or her opinion.

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the patient has not done this in advance), be examined, listen to what the doctor says, ask questions, note the answers, and get information about any necessary follow-up care. It is best for the patient to decide before the appointment whether the advocate will accompany the patient into the exam room. The advice in the following sections will help to make the doctor visit as informative and relaxed as possible.

In the Waiting Room

The advocate should be patient while waiting for the doctor. Read, chat with the patient, or bring a crossword puzzle book to occupy your time. Do not discuss confidential information that may make the patient feel uncomfortable in the waiting room. This can be a stressful time for the patient. Do what you can to relax, and to help the patient relax, before going in to see the doctor.

Be sure the patient reads and understands all the forms before signing them. If the patient does not understand the information in the required forms, either read and explain it, or ask the doctor or nurse for clarification or more information. If you will be helping to fill out forms for the patient, ask for a room where you and the patient can talk privately and where the patient will feel comfortable answering questions. Consider how to handle this situation in advance. Are you capable of answering questions for the patient? Can you get the information the forms require while waiting in the exam room for the doctor? The lack of privacy may jeopardize honest answers.

This may be the time to suggest research on the symptoms or the subject and to ask the doctor for the PRVW UHOLDEOH VRXUFHV R t sbreliRr PadW with Q, the dEck of nAy a SktoR X J K see it to be sure it comes from a reliable source. This is an important concern because commercial Web

sites often have products they are trying to sell, making it difficult to know whether the information is objective, research-based, and can be trusted.

Write down the date and time for the next appointment and the telephone number to call for any test results. You or the patient should call for test results, even if the office says they will call you. Never assume that no news is good news.

To schedule a workshop of the Family Centered Patient Advocacy Training and receive a Manual call Pulse CPSEA (516) 579-4711.