



MEDICAL ADVOCACY FOR VOLUNTEERS

The goal of TRAIL's Medical Advocacy Program is to provide medical advocacy, not medical care, to our Full members if they request it. Following is a list of assistance that TRAIL Medical Advocate volunteers can, and cannot, perform for Full members as part of our Medical Advocacy offerings. **NOTE: All TRAIL Medical Advocate volunteers must be fully vetted for transportation.**

TRAIL Medical Advocacy volunteers **can** perform the following duties:

- Provide transportation to and from medical appointments (door to door)
- Meet with the member to help prepare for physician visits
- Help the member formulate questions for the healthcare provider, fill out forms, and make lists of medications, supplements, vitamins, allergies, and other relevant information
- Attend physician visits and take notes during the appointment
- Cue the member to ask for clarification or a question at the visit (or, if agreed upon between member and volunteer, to speak on member's behalf)
- Assist the member with scheduling follow-up appointments
- Review and provide the member with a copy of the notes from the visit
- Accompany the member to same-day procedures that do not require more than local anesthesia nor home care/attendance after the procedure

TRAIL Medical Advocacy Volunteers **cannot** perform the following duties:

- No physical assistance or lifting can be provided before or after any medical procedures, though volunteers may offer an elbow for stability when walking or self-transferring
- Volunteers do not assist with organizing or administering medications in any capacity
- Volunteers cannot perform Activities of Daily Living (ADL) such as feeding, bathing, grooming, dressing, toileting, wound care, home care, etc.*
- Volunteers do not stay in a member's home after an outpatient surgery

*When requests are outside the scope of volunteer capability, TRAIL can assist members by recommending vetted professionals.

PREPARING FOR A MEDICAL APPOINTMENT

TRAIL asks each member working with a Medical Advocate to furnish a notebook or journal where medical information can be recorded. This notebook can be used to take notes prior and during the appointment and will stay with the member. The member is also asked to keep this notebook in a designated, accessible place in their home so that it can be used for additional appointments. TRAIL asks that a local emergency contact be listed on the inside of the notebook. The front of the notebook is also a good place to record allergies, medications, and any other pertinent information. TRAIL also has a medication form that can be used if the member needs it.

Helpful questions and tasks prior to the appointment and to *write down in the notebook*:

1. What is the chief complaint that needs to be addressed in this appointment?
2. What specific questions does the member wish to discuss with the healthcare provider about this complaint at the appointment? Again, list them in the order of importance.
3. Are there other concerns and/or symptoms that the member wishes to discuss with the healthcare provider at the appointment? If yes, list them in the order of importance and be as specific as possible. If applicable, have symptoms changed since the last visit?
4. Does the member have their prescription medications listed somewhere, or collected in a bag, and can it be brought with them to the appointment? Remember to include supplements and vitamins the member is currently taking, along with dosages. TRAIL has a medication form that can be used as a potential tool for this, and the TRAIL volunteer may help write the medications down, if needed.
5. Does the member have any problems taking medications as prescribed such as dosage, timing, side effects, with or without food, etc.? If yes, write those down.
6. Does the member want to be cued to ask for clarification or to ask questions OR does the member want the Medical Advocate to speak on his/her behalf if a question or concern has been forgotten or the member appears unsure of what has been said?
7. If a member receives unexpected news at the visit, does the member want the Medical Advocate to ask relevant questions?

Helpful tips for day of appointment:

8. Arrive on time, or early. Although the doctor may be running late, be sure the patient is not!
9. Give the nurse or nursing assistant the list of medications and allergies at the beginning of the appointment.
10. Give the doctor a copy of the list of concerns, issues, and questions in order of importance at the beginning of the appointment.
11. Make sure the member has an accurate understanding of any follow-up needed after the appointment.

TRAIL APPOINTMENT CHECKLIST FOR MEDICAL ADVOCACY VOLUNTEERS

PRE-APPOINTMENT		NOTES
Is the member aware that as a TRAIL volunteer, you have signed a privacy statement and have agreed to keep their information confidential?	Y/N	Privacy statement, if needed, is on file at the TRAIL office.
Does the member have a notebook ready to take to the appointment?	Y/N	
Have the answers from the questionnaire "Preparing for a medical appointment" been filled out and written in the notebook to the best of your ability, with the member?	Y/N	
Is there a local emergency contact name and number written in the notebook?	Y/N	
Have you reconfirmed the details of the appointment with the member (pick up time, appointment location etc.)?	Y/N	
DAY OF APPOINTMENT		
Does the member have their notebook with them?	Y/N	
Does the member have their current insurance card or information with them?	Y/N	
Does the member have a list and/or bag of prescription medication with them?	Y/N	
DURING THE APPOINTMENT		
Have you introduced yourself as a medical advocate volunteer with TRAIL of Johnson County to the nurses, doctor etc.?	Y/N	
If applicable, have you cued the member to ask additional questions during the appointment?	Y/N	
Have you asked the member if there is anything else that they have questions about regarding what the doctor has said?	Y/N	
Have you or the member asked for and received a written synopsis of the appointment?	Y/N	
Has a follow up appointment been made?	Y/N	
If applicable, has that synopsis been stapled into the member's notebook?	Y/N	
POST APPOINTMENT ITEMS		
Are the date of, and notes from, today's appointment written in the notebook?	Y/N	
If applicable, is the information about the next appointment (date, time, location, doctor name, requirements) written in the notebook?	Y/N	
Is the notebook back in its storage place in the member's home?	Y/N	
Does the member need to call the TRAIL office to schedule a ride to the follow up appointment? If yes, please remind them to, or if you have agreed to take them, please call and advise the TRAIL office.	Y/N	