

About This Pocket Tool

When accompanying your client to meet with their PCP in-person or via phone, ensure that they are doing as much as they can - only provide support when needed. Maintaining a clients' autonomy in treatment promotes wellness and recovery (SAMHSA, 2019).

This pocket tool provides guidance on how you can help your client prepare for, participate in and follow-up on an appointment or phone call with their PCP.



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This pocket tool provides guidance on how you can help your client prepare for, participate in and follow-up on an appointment or phone call with their PCP.



Support Your Client in Calling Their PCP

Before the Call

- Review reason for call (i.e. schedule appt, lab results, check in, solve a problem)
- Determine ONE question to ask
- Gather relevant information (i.e. client DOB, case numbers, insurance card, RX's)
- Write down/practice the ONE question
- Be prepared to take notes

During the Call

- Remain cordial, even when frustrated
- Thank the staff you talk to by name
- Identify yourself & relation to client
- Give call reason in two sentences or less
- Ask for your clinic contact (if applicable)
- Take notes including: who was talked to, information received and next steps

After the Call

- Briefly summarize notes in chart
- Develop next steps with client

Support Your Client in Calling Their PCP

Before the Call

- Review reason for PCP call (i.e. lab results, check in, solve a problem)
- With Client, determine 1 question to ask
- Gather relevant information (i.e. client DOB, case numbers, insurance card, RX's)
- Write down & practice the ONE question
- Be prepared to take notes during the call

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Support Your Client with a Primary Care Provider (PCP) Call or Visit

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Accompany Your Client to a PCP Visit

1 - Before the Appointment

- Call the client the day before and check-in about:
 - Travel plans, arrival and appt. times
 - Payment for transport, co-pays, & RXs
 - Purpose of appt.
 - Items to bring to appt.
 - How the client is doing

- Prepare with your client the following:
 - Diabetes: glucometer, food diary, glucose logs
 - Hypertension: blood pressure readings
 - Current medication list (or bring bottles)
 - Recent labs (esp. from psychiatric provider)
 - Recent hospital discharge summary
 - Upcoming or future specialty appointments
 - Written notes about how the client is doing

Accompany Your Client to a PCP Visit

- Write down how the client is doing:

- New or ongoing problems?
- How manageable is the care plan?
- Questions about diagnosis or treatment?
- Other relevant information?

2 - During the Appointment

- Comfort client if process is stressful or frightening
- Support check-in, as needed
 - Greet office staff & remind of your role
 - Offer items brought to appt.
- Sit with your client in the waiting area
 - Scan for possible triggers and avoid
- Offer to the join client in exam room
 - Explain that it is for advocacy & support
- If in exam room, refer to notes about how the client is doing only when needed to aid client

Accompany Your Client to a PCP Visit

3 - At the end of the Appointment

- Ensure visit summary/treatment plan is in writing & understandable to both your client and you
 - Review with client
 - Ask clarifying questions of PCP as needed
- Assist client with next steps per new plan
 - Schedule next appointment
 - Lab testing
 - Pick up new prescription
- Plan next contact with your client
 - Write down contact date/time for the client
 - Specify necessary details i.e. where, who
- Ensure client has transport for returning home

4 - After the Appointment

- Report update to team or supervisor
 - Update psychiatric provider if more urgent or if medication change planned

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