

Medical Note-Taking

Note-Taking Strategies

Presented by the Aging & Amazing Team



Malika Moore, LICSW
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About the Village

Palisades Village is a caring organization that focuses on helping older adults live independently, comfortably, and safely in their own homes. We offer inter-generational opportunities to socialize, learn, exercise, volunteer, and enjoy life while building a strong community in the Berkley, Foxhall, Kent, Palisades, Spring Valley, and Wesley Heights neighborhoods of Washington.

**PALISADES
VILLAGE**



Meet the Presenters

the Aging & Amazing Team



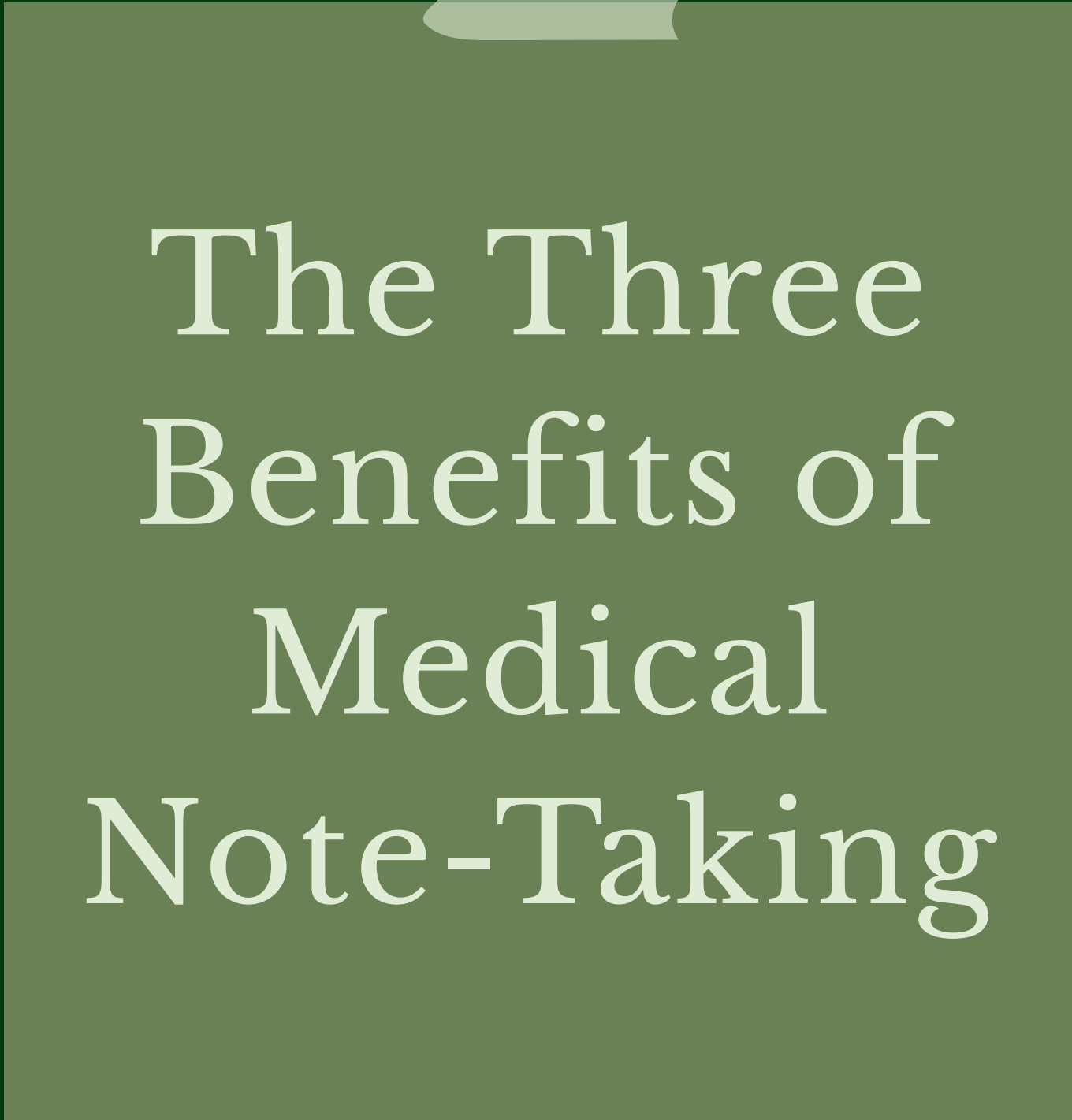
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LGSW*



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The Purpose of Notetaking

Accurate medical note-taking enables caregivers to document health changes, communicate effectively with healthcare providers, and ensure continuity and quality of care for the individual they support.



The Three Benefits of Medical Note-Taking



Peace of mind



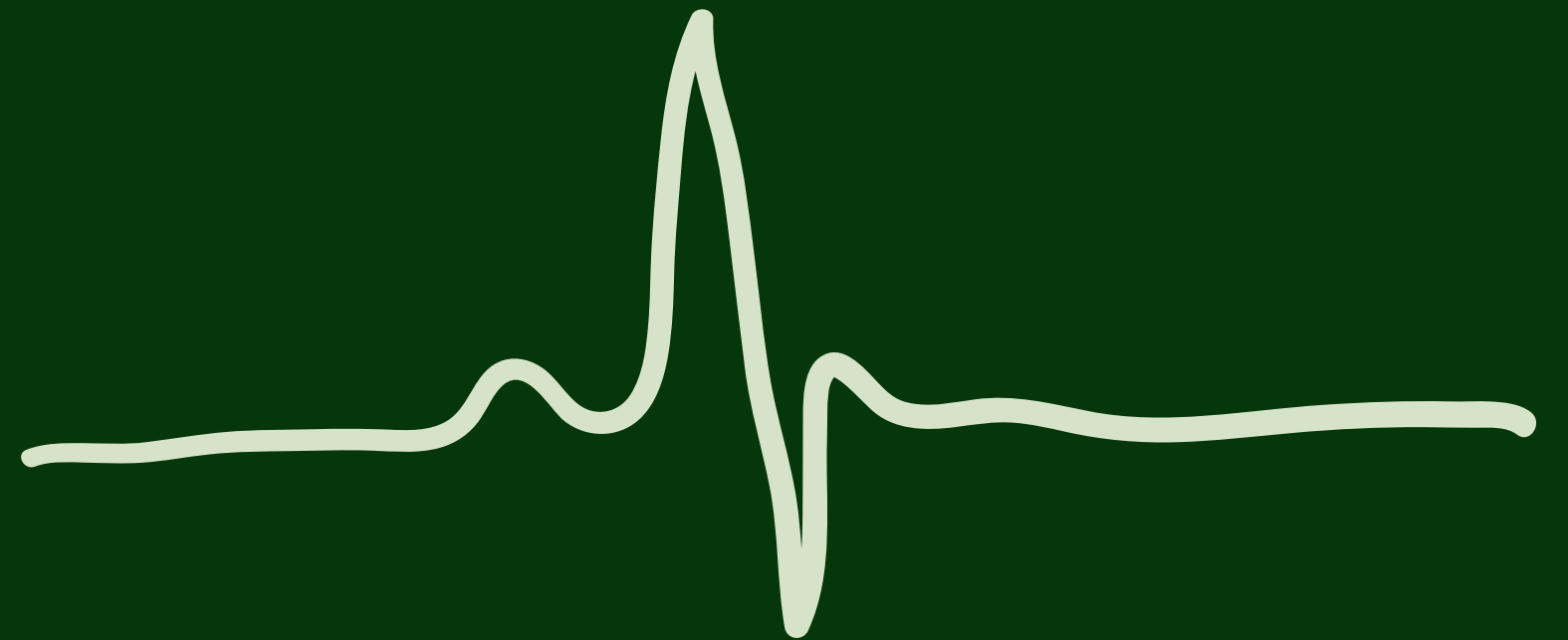
Clarity



Continuity

Medical Note Taking: At it's Core

- Active Listening
- Give full attention (eye contact, nodding)
- Don't interrupt — let them finish
- Repeat back in your own words
- Ask gentle clarifying questions
- Show care and understanding



Active Listening: Do's

- Look at the Village member when they speak
- Nod or use short phrases (“I see,” “Okay”) to show you’re listening
- Write down what’s important in their own words
- Ask gentle questions if something isn’t clear
- Confirm you understood: “So you want me to remind you about your new pill in the morning?”

Active Listening – Don't's

- Interrupt while they're talking
- Look at your phone or get distracted
(Inform, if taking notes.)
- Jump in with your own story or opinion
- Ignore their feelings or concerns
- Assume you understood without
checking back

Relationships Matter

Notice Patterns

- Changes in health, mood, or memory
- Concerns repeated from visit to visit

Support Quietly

- Keep a running list for the next appointment
- If needed, discreetly hand a note to:
 - Doctor (health concerns)
 - Receptionist/nurse (logistics)

Remember, you're supporting, not speaking for the Village member



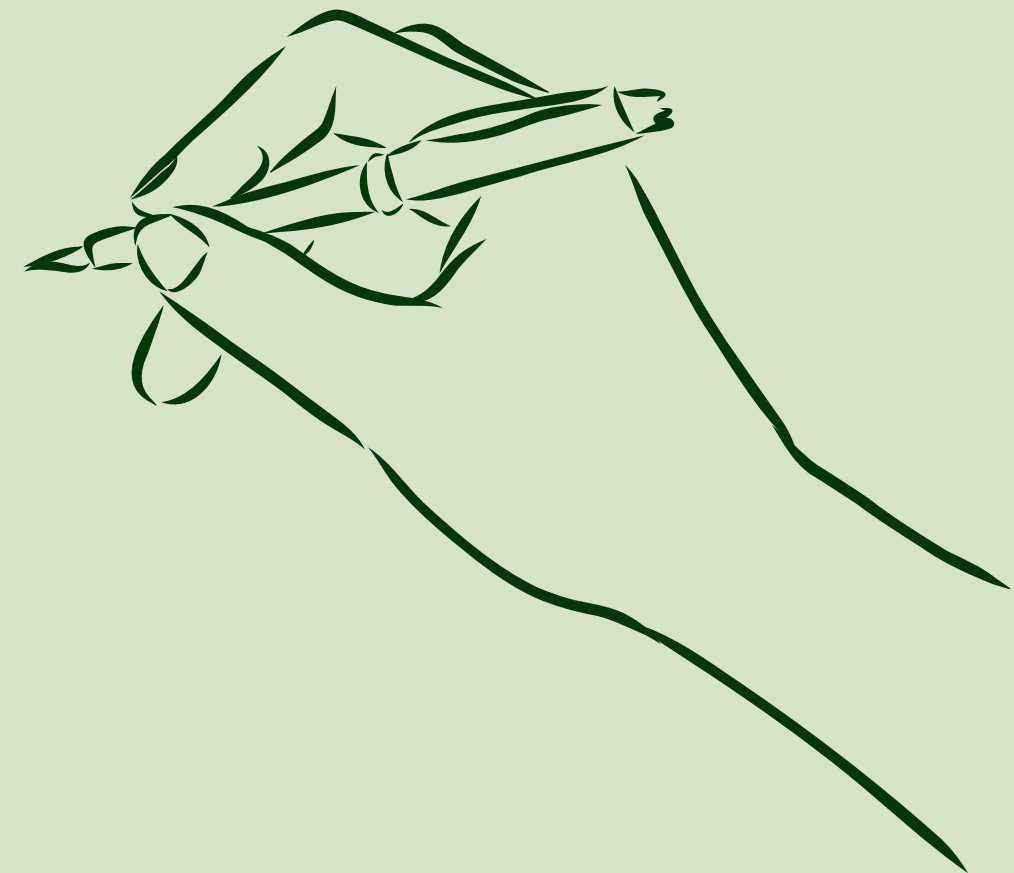
Before the Appointment

Note-Taking Methods

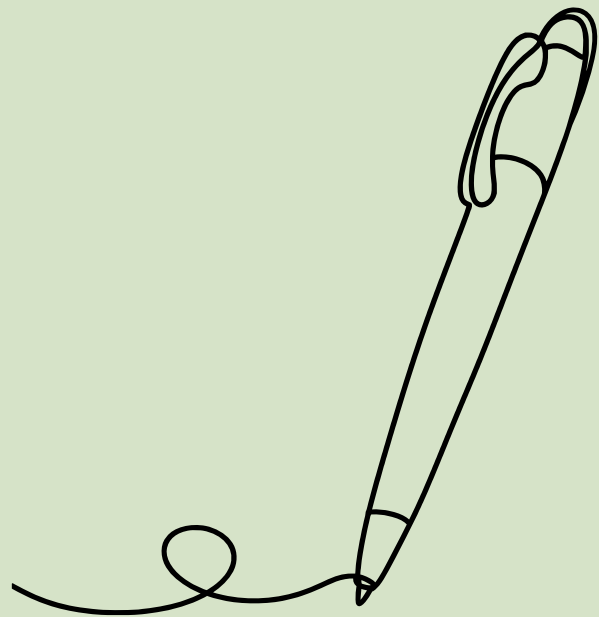
Use what works best:

- Village form
- Notebook
- Tablet/computer

Make sure to honor confidentiality with any method you use



Before the Appointment



- ✓ Bring updated medication list
- ✓ Collect emergency contact info
- ✓ Have a folder or binder for visit notes
- ✓ Identify priorities and review past concerns

Prepare for the Unexpected

- Have emergency contact info ready
- Know what to do if the client becomes ill during the visit
- Stay calm, supportive, and focused
- When in doubt → contact the Village contact

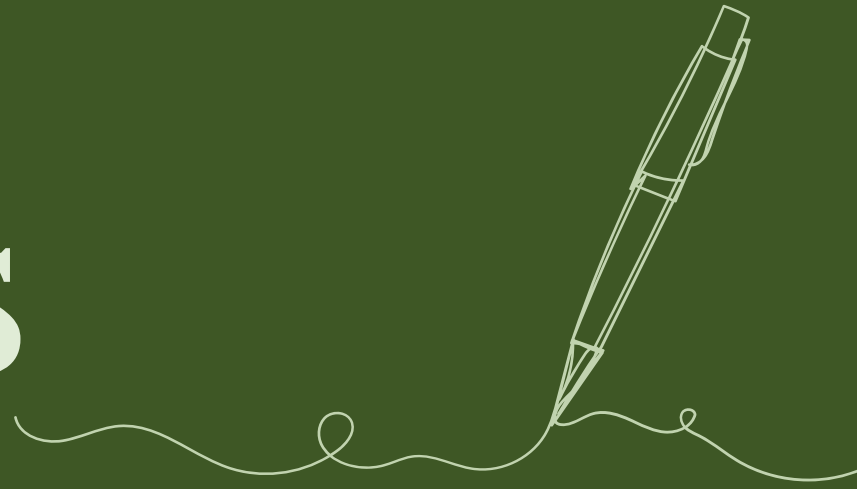
Active Listening

Before the Appointment

- Ask the Village member how involved they want you to be
- Review their medication list and priorities so you know what matters to them
- Listen carefully to their concerns ahead of time (ex: “I’ve been feeling dizzy”)
- Write down their goals to bring into the visit

Key Questions

to ask pre-appointment



- ① “what is your goal for this appointment?”
- ① “what are your questions for the provider?”
- ① “How can I best support you during this appointment?”
- ① “What do you need to update your provider on?”

During the Appointment

Respect the Client



Ask: “How involved
would you like me to
be?”



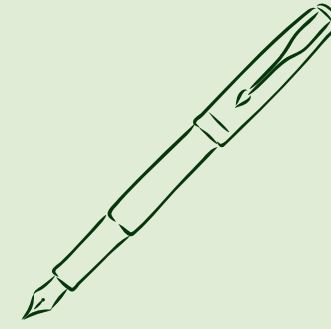
Protect dignity &
privacy



Honor personal
choice in
participation

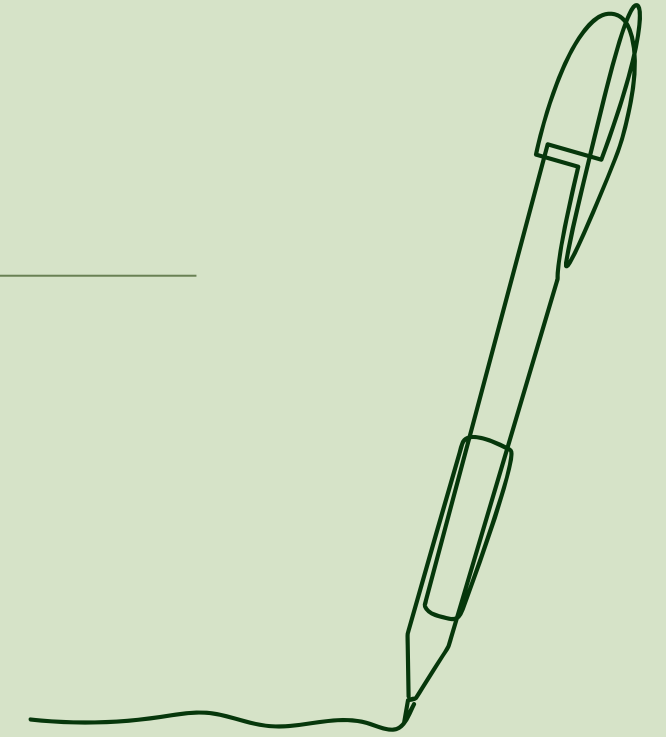
Active Listening

During the Appointment



- Give full attention (eye contact, nodding, open body language)
- Do not interrupt – let the Village member and doctor speak fully
- Reflect back what you hear (“So you’re saying the new pill should be taken in the morning?”)
- Clarify instructions or questions when needed
- Note both the doctor’s directions and the Village member’s concerns

The Practicals of Note-Taking



- note the vitals listed by medical staff
- write down any symptoms listed by the patient
- note the questions asked by the doctor
- note the questions asked by the patient

don't be afraid to ask questions!

Capture Key Information

- Doctor's notes & questions (beyond after-visit summary)

- Action steps assigned by provider
- Progress notes reflecting the client's voice

Ethical & Practical Considerations

- Maintain confidentiality
- Protect sensitive information
- Support autonomy and decision-making of client



A close-up, warm-toned photograph of a person's hands on a car's steering wheel. The person is wearing a dark watch on their left wrist. The background is blurred, showing green foliage and bright sunlight. A semi-transparent green rectangular box is overlaid on the right side of the image, containing the text "After the Appointment" in a white serif font.

After the Appointment

Active Listening

After the Appointment



Repeat: back key points to confirm accuracy with the Village member

Ask: “Did I capture what felt most important to you today?”

Listen: for emotional reactions or unspoken worries (“I’m nervous about starting this medication”)

Organize: notes clearly for follow-up with the Village contact or family

Encourage: the Village member’s voice in next steps

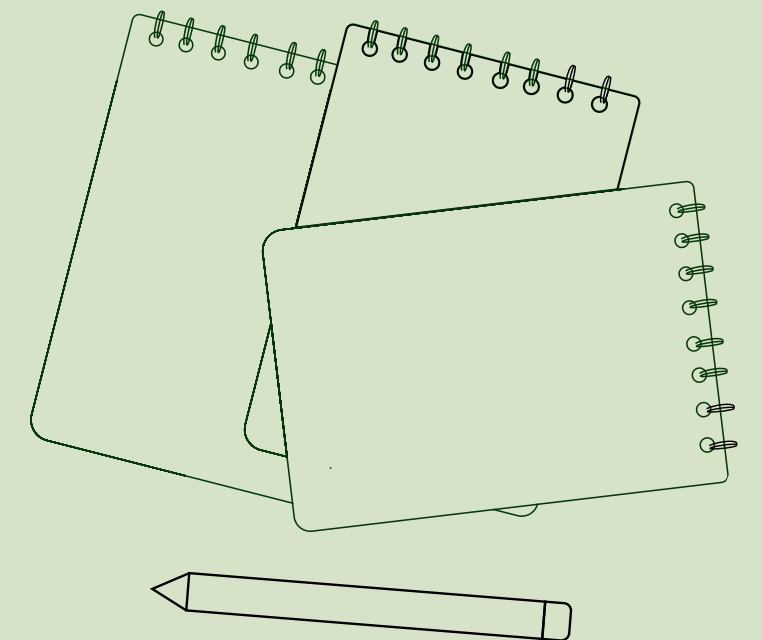
S i l e n c e

After the Appointment

- Note time-sensitive action steps.
- Organize notes in visit folder.
- Confirm next steps with client.
- Share notes with village contact or family (if appropriate).

Writing a Care Summary

- Appointment Summaries can help clients maintain consistency and continuity of care
- write the summary in third person
- utilize bullet points and avoid large chunks of text
- highlight specific points and include action steps
- include upcoming appointments



Care Summary

Village Member: _____

Date: _____

Doctor/Specialty: _____

Before the Appointment

Top concerns/questions: _____

During the Appointment

Doctor's instructions: _____

Follow-up/tests: _____

Village member concerns: _____

After the Appointment

Key action steps: _____

Notes to share: _____

Next appointment: _____



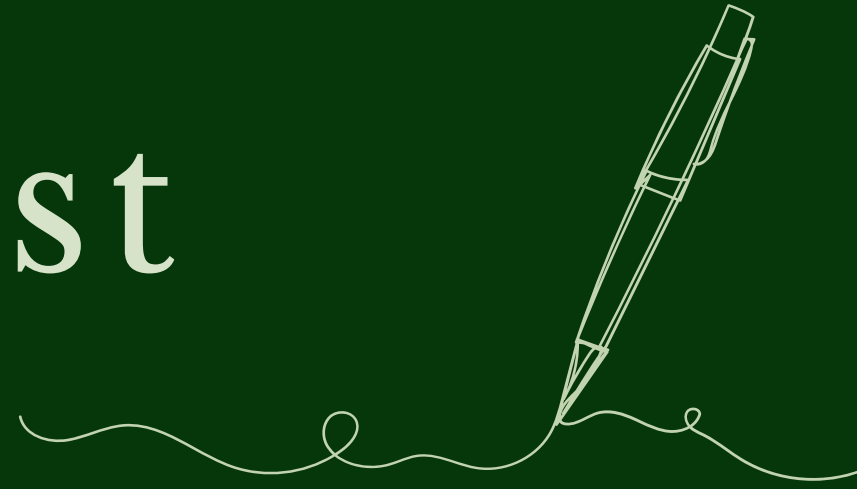
Real Life Application

Q & A



A Quick Checklist

for Village Volunteers



- ☐ Ask senior about involvement
- ☐ Bring meds list & contact info
- ☐ Listen actively & take notes
- ☐ Capture action steps & progress
- ☐ Be prepared for unexpected situations
- ☐ Organize & follow up with village contact

Key Takeaways

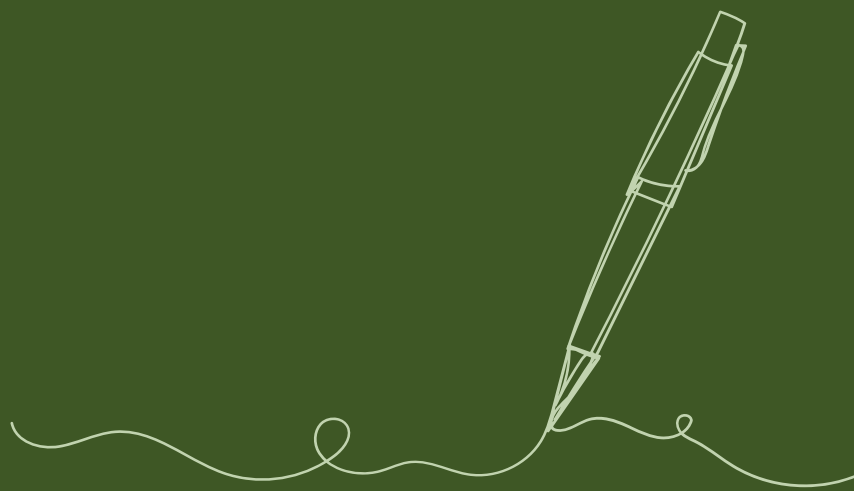
- ☒ Medical notetaking ensures communication between patient and provider
- ☒ Respect the senior and utilize active listening skills
- ☒ bring medication list, a folder for notes, and emergency contact information to all appointments
- ☒ capture key information, including questions and action steps from the provider

Resources

- AI
- Zaggo Care | www.ZaggoCare.org
- Recording with Permission



*The goal of a notetaker is always
dignity, clarity, and support.*



Guiding Care, Cultivating Peace of Mind



Stay in Touch!

With Aging & Amazing - Care Management Group



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