



MEDICAL NOTETAKING: Advocating for Others or Yourself at Medical Appointments

By Phyllis Kimmel

Have you ever felt rushed at a doctor's office? Have you ever gotten home from an appointment and realized you still had questions for your doctor? If so, you are not alone.

Michele Kirby, LICSW and Malika Moore, LICSW, with *Aging & Amazing* (a care management group), have developed a training on **Medical Notetaking**, chock-full of useful pointers on how to navigate medical appointments. The Aging & Amazing team brought their training to DCV on February 6; some practical tips are summarized below. This advice can be used if you are a volunteer helping a Village member, a caregiver helping a loved one, or if you are your own advocate at medical appointments.

Before the Appointment: Be prepared for your appointment. Bring a list of your current medications (including vitamins and supplements), any recent symptoms, and a list of questions you want the doctor or nurse to answer. You may want to send questions to your provider through your medical portal ahead of time so they have time to think about them; if so, do so a few days in advance to make sure they see them in time.

If you are accompanying someone else to an appointment, find out how you can best support them—do they want you to just listen and take notes? Do they want you to pipe up and ask questions? Discuss ahead of time their goals for the appointment.

During the Appointment: This is the hard part, because doctors these days are often rushing to get to the next patient. And you may be hit with information overload. Particularly when dealing with a difficult diagnosis, it can be overwhelming to gather your thoughts, ask all your questions, let alone remember what the doctor's answers were.

Michele and Malika recommend active listening techniques while at the appointment. Some dos and don'ts:

- Make eye contact.
- Don't be shy about asking clarifying questions if you did not hear or understand something—-but ask kindly.
- Repeat back what you think you heard in your own words to make sure you understand.

- Pay full attention.
- Don't interrupt.
- Don't look down at your phone (unless you are using it to take notes, in which case, let the doctor know, so they don't think you're just checking Facebook!).

When taking notes, try to write down what the doctor says in their own words. Include vitals, symptoms discussed, and questions the doctor asked you. Depending on your personal preference, you may want to take notes the old fashioned-way, with pen and paper. If so, keep all of your notes in one dedicated notebook, rather than on individual scraps of paper. Or, you can use an iPad, your laptop or your phone; just make sure your device is fully charged before your appointment.

You may wish to record the appointment—**but with permission**. Although recording without permission may not be unlawful in DC, individual medical facilities may have their own rules about audio or video recording. And doing so without asking first can damage the trust of the patient-doctor relationship. There are pros and cons to recording. While recording ensures you don't miss anything, it could put your doctor on guard, who might speak less freely. Use your best judgement in these situations.

Before ending the appointment, confirm the next steps, such as any future appointments, lab tests that need to be scheduled, or prescriptions to pick up.

After the Appointment: If you accompanied someone to the appointment, don't underestimate the power of silence immediately after. The patient may need some time to decompress. As soon as possible, review and organize your notes, highlight time-sensitive next steps, and put any future appointments in your calendar. If helping someone else, be mindful of protecting the confidentiality of the notes.

If you have an upcoming appointment and want someone to accompany you for moral support or notetaking, don't be afraid to ask for help: that's what the Village is here for!