

## Taking Charge of Your Medical Care Teacher Guide

### Lesson Objectives:

Participants will:

- Learn to take an active role in their medical care.
- Recognize the benefits of maintaining records of their medical care.
- Review steps to maintain records and information regarding their medical care including family and personal history; and related billing and insurance records.
- Learn to improve their communication with their medical care providers so they can receive the best medical care possible.

### Materials needed:

- **For Teachers:**
  - Teacher Guide
  - Script for Skit – “A Visit With My Doctor.” (page 8)
- **For participants:**
  - Member handout, 1 copy for each member
    - 6 items included: Health Information Form, Exams and tests/ Medications, Medical Care Record sheet, My Health and Family History, Medical Expenses Record, My Appointment Planner
  - Evaluation and Consent letter, 1 copy for each member

### Before the lesson:

- Copy needed number of Skit script, Member handout, Participant Evaluation and Consent letter.
- Read Teacher’s Guide and Participant materials.
- Write text on flipchart paper (see next page for what to write).
- Plan your presentation. The following timing for activities and discussion is suggested for a one hour lesson:

Welcome and Introductions	20 minutes
Taking Charge of Your Medical Care	10 minutes
Creating Your Medical Record	5 minutes
Improving Communication	15 minutes
Evaluation and Closing	10 minutes

- As participants arrive, recruit 2 volunteers to assist with the skit, “A Visit With My Doctor.” Provide them with a copy of the script so they can read it over before they are asked to participate.

**Flipchart preparation: Write the text below on flipchart pages.**

<p>Flipchart #1</p> <p style="text-align: center;">My Medical Care</p> <p style="text-align: center;">ME</p>	<p>Flipchart #2</p> <p>My medical appointment</p> <ol style="list-style-type: none"> <li>1. Complete “My Appointment Planner”</li> <li>2.</li> <li>3.</li> <li>4.</li> </ol>
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<b>Information to share with your group:</b>	<i>Teaching instructions:</i>
<p><b><u>Welcome and Introductions</u></b></p> <p>“Taking charge of your medical care,” was prepared to help you learn to take an active role in your medical care, to improve your communication with your Doctor and to make sure you give and get the information you need to make wise decisions regarding your health.</p> <p>What’s at stake is something very important – your well being!</p> <p>Communication is a wonderful thing when all goes smoothly and both parties feel they have been heard. However, communicating with medical care providers can sometimes be challenging.</p> <p>Remember the doctor’s office visits shown on the old television series, <i>Hee Haw</i>:</p> <ul style="list-style-type: none"> <li>• Patient: “My arm hurts when I do this” (moving arm up and down)</li> </ul> <p style="padding-left: 40px;">Doctor: “Then don’t to that!”</p> <p>Can you think of other humorous or disastrous examples of miscommunication with medical care providers? These might be real or something you have seen or heard on tv or a movie.</p> <p>Miscommunication involving your medical care is no laughing matter. In this lesson you will learn to improve your communication with your medical care providers so you can receive the best medical care possible. Today we will review the benefits and steps to allow you to maintain records regarding your medical care including family and personal history, related billing and insurance records as well as a planning worksheet to take with you for your next doctor’s appointment.</p>	<p><i>Take a moment for everyone to introduce themselves. Ask them to share a humorous medical story or a situation when they feel they haven’t been heard correctly during a doctor visit or medical procedure.</i></p>

**Taking Charge of Your Medical Care**

Why is it important to maintain copies of your health records?

It is not safe to assume that your doctor will maintain a complete medical history file for you. Today, individuals see a myriad of doctors, including general practitioners, specialists, and surgeons, as well as dietitians and health care advisors, just to name a few. Your test results, case file notes and diagnostic exams may not be shared from one doctor to the next. In addition, your doctor may only maintain a year or two of records in your present file. Other records may be archived and not be readily available. It is in your best interest you to have your own set of records.

Those medical records can come in quite handy. You'll want to take them with you should you need to visit the emergency room or urgent care. You will likely want to take a more condensed version with you when you travel. Anyone who has broken their glasses, lost their luggage with their prescriptions, or had a medical emergency when traveling can tell you how convenient it is to have your information readily available.

Let's take a moment to review the current situation in our healthcare industry:

- The average general practitioner will conduct about 120,000 to 160,000 patient interviews during a typical 40 year career.
- A 2003 study of 2659 outpatients at two hospitals found that 42% did not understand home care instructions.

(\*\* Center for Advancement of Health, Facts of Life, March 2003, vol. 8 no. 3)

*Give members a few moments to think about this and offer answers.*

Now, let me ask you about your current situation. You don't need to answer these out loud.

If you answered "no" to any of those questions, this lesson is for you.

*Distribute Member Handout. Refer members to the 4 questions in the middle of the page.*

**Creating Your Medical Care Record**

One of the first steps in taking control of your own health care is to create your own record of your medical history and your medical care. This "Do You Know Your Medical History?" portion of the lesson has been adapted from materials prepared by the Purdue University Cooperative Extension Service.

These Medical Care Records are also available online so that you can enter your information on your computer, get additional copies, or save them on your computer. The website is listed on your Member Handout.

<p>Your information can easily be kept in an accordion file folder, box with hanging files or a 3-ringed notebook, whichever tool you find most useful.</p>	
<p>Create a storage system that works for you. The goal is to keep all your records, forms and lab results in one organized place.</p> <p>Gathering your healthcare information into one location will take some time and effort.</p> <p>You will want to list all your current doctors and past doctors and their contact information. If you have a difficult time remembering what doctors you've seen, you can refer to your old insurance forms and medical bills to help.</p> <p>Contact each medical care provider and request recent medical records and results from previous visits. Medical providers may require this request to be in writing and ask you to pay a processing or copy fee.</p> <p>Ask for copies of:</p> <ul style="list-style-type: none"> <li>- Routine or preventive physical, dental and vision exams.</li> <li>- Records of any abnormal exams or test results, for example mammogram, Pap smear or EKG.</li> <li>- Blood and other laboratory work such as cholesterol levels, blood glucose, etc.</li> <li>- Any diagnostic tests you've had such as biopsies, x-rays, EKGs, HIV and STD tests.</li> <li>- Records of flu shots, immunizations you may have received for travel and any boosters, such as tetanus-diphtheria.</li> <li>- Screening tests (mammogram, Pap smear, clinical breast exam, skin check, sigmoidoscopy, and colonoscopy).</li> <li>- All prescribed medications.</li> </ul> <p>Keeping your healthcare record up to date will help you to formulate questions you need to ask of your doctors and provides ready access to your previous history which may impact your care today.</p> <p>Develop a system for recording your updated information after doctor appointments and changes made in your medical care.</p>	
<p><b><u>Improve communication with your care providers.</u></b></p> <p>There are many people involved in your medical care. They have different needs for information and different points of view for providing input.</p>	

<p>Let's make a diagram of who is involved in your medical care. We will start with you in the middle. This should highlight that you should play the most significant role on this team. We will name this "My Medical Care," as a reminder that everyone needs to communicate and work together toward a common goal, your good health!</p> <p>Who is on your team? (List could include: primary care physician, nurses in medical offices, specialists, pharmacists, therapists, dietitian, instructors, and insurance provider.)</p> <p>Think about others who are involved as members of your medical care team because they provide information, discuss your medical care with you, provide advice or share experiences, help you access medical care, are involved in decision making, provide assistance with your medical care. (List could include: family members, friends, care providers, the media.)</p>	<p><i>Flipchart #1. "My Medical Care."</i></p> <p><i>List members of your medical care team by adding intersecting circles.</i></p>
<p>It's easy to see from this diagram how miscommunication and lack of communication can happen in regards to your medical care.</p> <p>Communication always takes effort. When there are more people providing input and expecting information, it takes more effort. You cannot assume any member of your medical care team has complete knowledge. Having up-to-date records is the first step in good communication. The next step is preparing for a medical appointment.</p>	
<p>Have you ever had an appointment with a medical care provider that went like this skit?</p>	<p><i>Perform skit, (Page 8) "A visit with my doctor."</i></p>
<p>How did Mrs. Madden feel after this appointment? Did she get her concerns addressed? Did she receive the care she needed? Why not?</p>	<p><i>Give participants a few moments to share their feelings.</i></p>
<p>Medical care providers often have limited time for each patient they see. In that time, they may not be able to sort through the symptoms and conditions a patient shares to determine which is the highest priority.</p> <p>You can help your medical care provider to help you by being informed and prepared for your medical appointment.</p> <p>Completing a "My Appointment Planner," before each appointment will help you prioritize what your medical needs are and think about the details that you need to share with your provider so they fully understand your condition and can focus on one item at a time.</p> <p>Consider involving additional members of your Medical Care Team in preparing this planner. They may have questions or information to include.</p>	<p><i>Refer to the "My Appointment Planner" in the Member handout.</i></p>

<p>There are additional things you can do to ensure that your appointment goes smoothly and you receive the best attention and care from your provider that is possible. What are other things you could do to help a medical appointment be successful?</p> <p>(Answers should include: Bring someone with you. Arrive in plenty of time to check-in and gather your thoughts before the appointment. Be positive and cheerful. Share your information with the doctor with short and direct answers. Start with the most important issue first. Be honest and complete. Stick to the topic. Listen carefully to the doctor and repeat what they tell you to make certain you understand. Ask for more information until you are certain you understand. Write down what you are told. Gather information about your condition. Tell the care provider thank you. )</p> <p>The responsibility for your health care is shared between you and your care providers. Everyone needs to do their share to communicate fully and effectively. Including some of these suggestions (listed on flip chart) will help improve the quality of care you receive.</p>	<p><i>Flipchart #2</i>  <i>“Your medical appointment.”</i>  <i>Give participants some time to think of suggestions for a successful medical appointment. List answers they give.</i></p>
<p>One final important reminder:  Keep your information safe. Protecting your medical history and records is just as important as protecting your personal information from identity theft.  Your medical records contain personal health, identification and financial information. Protect your health history storage system and think about who you share the contents with.</p>	
<p>Thank you for participating in the activities today. We would like to know how you felt about this lesson.  (Read Informed Consent Statement aloud to the group.)</p>	<p><i>Distribute the Informed Consent Statement and evaluation. Collect evaluations forms that are completed and return them to your county Extension office. Thank you!</i></p>

## **Taking Charge of Your Medical Care References and Resources**

American Health Information Management Association, Patient Information, 2006.

Center for Advancement of Health, Facts of Life, vol. 8 no. 3, March 2003.

Comprehensive Health Education Foundation, Appointment Planner, 2001.

Hibbard, Judith. Patient Activation Measure. University of Oregon, 2003.

Leinhart-Cross, Mary Ann and Jones, Annetta. Do You Know Your Medical History? Purdue University Cooperative Extension Service, 2004.

National Institute on Aging. National Institutes of Health. A Guide for Older People: Talking With Your Doctor. NIH Publication No. 05-3452, August 2005.

National Family Caregivers Association. Communicating Effectively with Health Care Professionals. Kensington, MD, 2003.

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## **Script for Skit “A Visit With My Doctor”**

**Teacher:** Read description of roles to group participants:

**Dr. Smith** is a physician in a busy clinic. He often runs behind schedule because of urgent, unscheduled cases that come in.

**Josephine Madden** is a 72 year old woman in moderately good health. She suffered a mild heart attack 3 years ago. Mrs. Madden feels slightly intimidated by Dr. Smith. Lately she’s been feeling rather anxious, and her heart feels like it’s “fluttering” in her chest. She really doesn’t want to “bother” the Doctor with her problems since he’s always so busy.

**Skit:**

**Dr. Smith:** “Hello. How are you today?”

**Mrs. Madden:** “I don’t know. I just don’t seem to be feeling ... I don’t know. I’m tired, which isn’t like me. Then I don’t sleep and I lie awake and worry. I worry about my heart. My son says I’m a worrier and I let things get to me.”

**Dr. Smith:** “Trouble sleeping. Do you keep a regular schedule? Maybe something to help you sleep? Let’s try that and see if it helps. Remember, no coffee late in the day. Try not to nap; that will help. Try to get some exercise during the day.”

**Mrs. Madden:** “Well, I’m not sure that’s it. Getting some sleep would probably help though.”

**Dr. Smith:** “Well, we’ll give this a try. If you can get some sleep you will get up and keep busy so you don’t worry about things. I’ll order the prescription and you can pick it up after the nurse gives you an after-visit summary with some tips for treating insomnia.”

**Mrs. Madden:** “Well, alright.”