Scheduling an Appointment

Moving from Pediatric to Adult Health Care

Lesson Plan

healthy transitions

healthytransitionsny.org

Learning Objectives:

- Gain ability to differentiate between a routine visit and a visit for a specific reason
- Be familiar with information that is needed when scheduling an appointment
- Organize information using a calendar, journal, or appointment log
- Utilize checklists and templates when making a phone call to schedule an appointment
- Practice listening & speaking while making a phone call to schedule an appointment
- Master skill of recording dates & times accurately

You Will Need:

- ❑ Cell phones
- ❑ Pen or Pencil
- ❑ Individual copies of insurance card, calendar and role play scripts (print the blank forms at the end of this unit)
- ❑ White board, blackboard, or poster for KWL chart & mind map
- ❑ Computer or DVD Player and Videos (download from www.HealthyTransitionsNY.org)

About the Healthy Transitions Lesson Plans

The Healthy Transitions lesson plans are designed for group sessions with an instructor and 5-15 young adults with developmental disabilities. Each module can be completed during an hour-long session that includes time for breaks and informal discussion. Units can be presented as a stand-alone activity, or as a 6-part curriculum. The goal is to foster self- determination and the active involvement of young adults with developmental disabilities in their own health care.

The lesson plans are organized around modeling and role-play for 6 key interactions relevant to successful navigation of the health care system:

Office Secretary	>	Scheduling an Appointment
Transportation Provider	>	Scheduling Transportation
Office Receptionist	>	Paperwork at the Sign in Desk
Physician or Nurse	>	Speaking up at the Doctor's Office
Pharmacist	>	Calling in a Prescription Refill
Service Coordinator	>	Setting Health Goals

The lesson plans focus on encounters with ***people*** in the health care system. This format was developed with input from young adults with developmental disabilities. Our focus groups revealed that young adults with developmental disabilities experience health care in terms of buildings (hospital, offices) and episodes (emergencies), rather than relationships and interactions. The Healthy Transitions lesson plans build skills that youths can use to partner more effectively with their health care team.

Modeling, role-play, and active participation are key components of each lesson plan. Lesson plans also include chant, rap and cheers to foster a positive learning environment. Each module begins with an informal assessment of the participants' strengths, knowledge, experiences, and learning styles. Skills can be developed across a wide range of individual ability levels by mixing and matching activities as appropriate for each group.

The Healthy Transitions lesson plans were developed by Patricia Slaski, MEd, a teacher with more than 33 years of experience in the field of special education. Pat is also the mother of an adult daughter, Darcy, who has multiple disabilities. The modules were designed with input from youths, parents, health care providers, service coordinators, and educators with funding support from the NYS Developmental Disabilities Planning Council, the NYS Department of Health, Burton Blatt Institute at Syracuse University, and the Golisano Children's Hospital at SUNY Upstate Medical University in Syracuse, New York. The Healthy Transitions project also features a ten-part series about health care transition for professionals and parents. Please visit us on the Internet at www.HealthyTransitionsNY.org for more information.

The suggested sequence of skill building activities is:

1. **KWL chart:** This chart is used at the beginning and at the end of each session. It summarizes current knowledge about a topic—what participants want to know—and, at the end of each session—what was learned.

2. **Video:** The group views several brief 2-3 minute video vignettes. These videos feature actors who are young adults with developmental disabilities demonstrating etiquette and skills relevant to various health related skills. The videos can be viewed and downloaded from www.HealthyTransitionsNY.org.

3. **Mind Map:** After viewing each video, a mind map is generated as a group activity to summarize concepts and ideas learned.

4. **Confidence meter:** This is an individual self-rating measure to create awareness about the participant's comfort, attitude, and familiarity with a specific health care interaction. The confidence meter is used before and after the role-play activity to track progress.

5. **Role-play:** Participants break into small groups for role-play practice. A sample form can be used as a script. Each participant can also customize a blank role-play template.

6. **Confidence meter:** The confidence meter is used after the role-play activity to track progress regarding comfort, attitude, and familiarity with a specific health care interaction.

7. **KWL chart:** This chart is used at the end of each session, to summarize what was learned. Items listed in the "What I Learned" column can be used on the certificate to document achievement at a wide range of individual ability levels.

8. **Rap, Chant, Group Energizer:** These activities are "group energizers" that can be used to engage participants at anytime during the lesson plan. These may be particularly relevant to auditory or tactile learners or participants who are unable to engage in structured role-play

9. **Certificate:** Items listed in the "What I Learned" column can be used on the certificate to document achievement at a wide range of individual ability levels. Self-score on the confidence meter is used to embellish the "seal" on the certificate of achievement for each module.

Note from Pat: *Please contact us at www.HealthyTransitionsNY.org if you have any questions or suggestions for improving the curriculum.*
We welcome feedback!

Sincerely,
Pat Slaski

Sample

KWL Chart

Topic: Scheduling an Appointment

What I Know	What I Want to Know	What I Learned
You call ahead	What do you say?	You can schedule an appointment for a regular check-up or if you are sick
Usually you schedule the next appointment at the end of the visit	How long does it take to get an appointment?	You need a calendar They ask you about insurance
		Always make sure you have a ride to the appointment
		Ask whether you can get into the office with a wheelchair
		You can say what time you want

How to use the KWL Chart: The first two columns are filled in at the beginning of a unit to find out what learners already know about a topic, and what they want to know. The last column is filled in at the end of a unit. It can be used to identify mastery of a topic at a wide range of individual skill and ability levels.

Video Guide: Scheduling an Appointment

This vignette provides information for individuals to schedule their own doctor's appointments. It provides a step by step set of instructions through role play by actors. It may be necessary to view the vignette several times and go over each point individually in order to promote independence with this task.

1."Have ready . . . "

Find out where the person keeps his/her important phone numbers, insurance cards etc., and if she/he cannot tell you where, help him/her to create a log. Important phone numbers should be kept in a place that is readily accessible to the person: in a wallet, handbag or in a special location set up specifically for this purpose. Having special places for important information is necessary for record keeping. Discuss where the person could keep this information.

2."Say who you are . . . Say why you need the appointment"

Explain the difference between a routine appointment and a visit that is scheduled for a specific reason. Go over some of the common reasons people need to see their physicians.

3."You might be asked . . . "

Most people cannot remember when they last saw their doctor, so they need to look this information up before making the call. People need to remember to have their insurance card available before they make the call. The moderator can encourage people to keep an appointment log or medical journal with a list of all appointment dates for a quick reference. Include all doctors' names, phone numbers, and insurance information in the front of the log, for easy access.

4."Repeat back . . . "

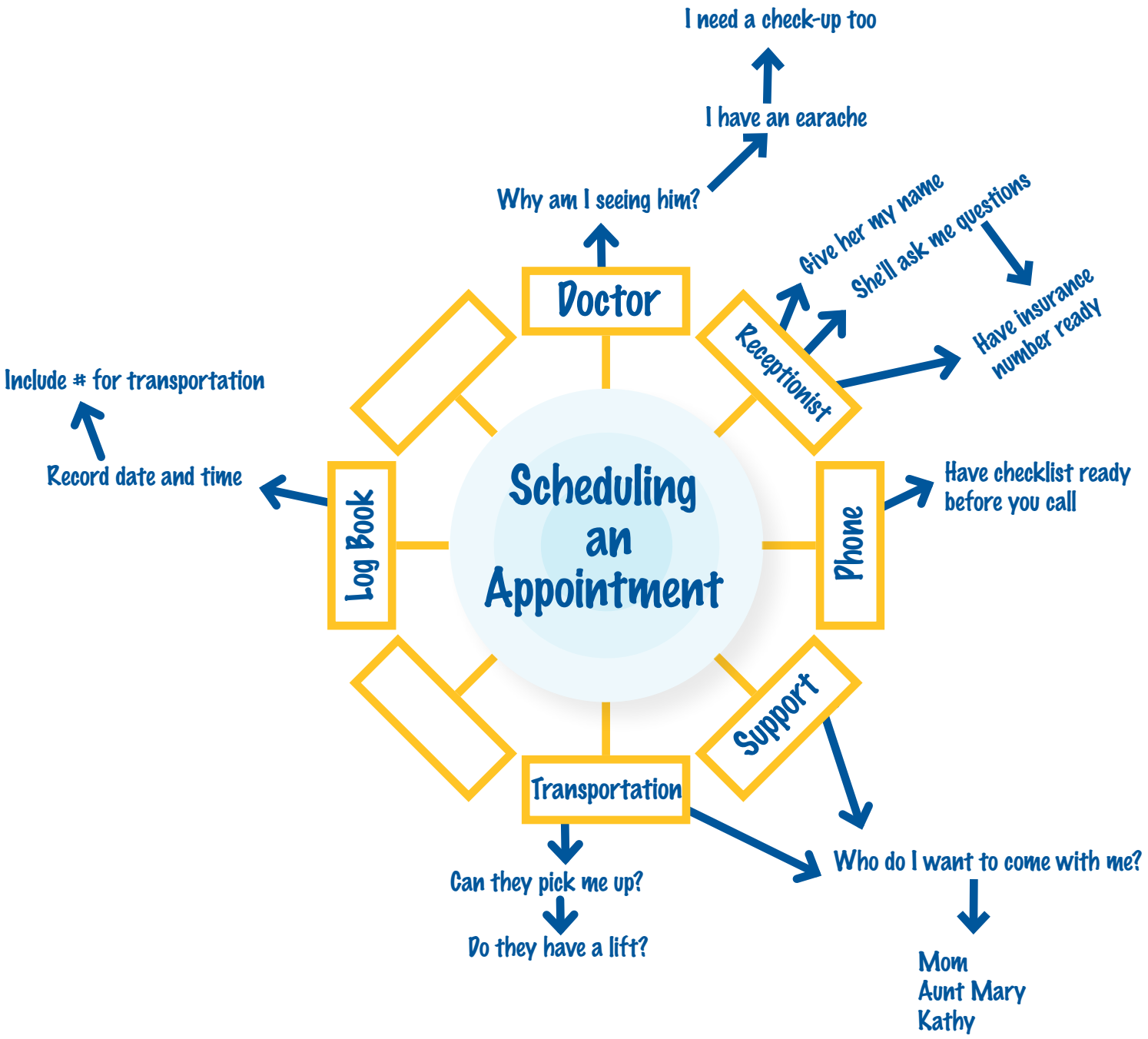
Recording the date and time accurately is not as easy as it seems. This is an area where many errors can occur. Practice listening and writing at the same time. The person with a disability might need to ask the person to whom they are speaking to talk slowly. It's important to repeat back the date and time, to assure accuracy.

Questions for Group Discussion

- **What do you need to have ready before calling to schedule a doctor's visit?**
- **Name two main reasons for scheduling a medical visit.**
- **Have you ever called a doctor's office to schedule your own medical appointment?**

Download this video by selecting the **"VIDEOS"** tab on our home page at www.HealthyTransitionsNY.org. To download a moderator guide for all of the videos, click the **"SKILLS"** tab.

Sample Mind Map



How to use the Mind Map

This chart can be used in individual or group settings to break down the information that was presented in the video vignette. Enter the video title in the center area and related topics in the surrounding boxes. Draw lines to make connections between related topics. Additional ideas may be added by drawing separate lines outward. Color and pictures may be used to enhance information. "Post-it" notes can also be used. These can be arranged by the group on a table or a white board.

Confidence Meter

How to use the Confidence Meter: Participants are asked to rate how confident they are about interacting with various health care professionals. The confidence meter focuses attention on their socials skills and language pragmatics. It can be used to generate discussion about the importance of active participation in one's own health care.

Role Play Example: Scheduling an Appointment

1. Gather the items you will need to make an appointment at your doctor's office:
2. Using the following script, practice making a phone call with a partner who acts the role of a doctor's office receptionist.
3. Write down the information you receive in your calendar. Reverse roles.

You Will Need:

- ❑ Cell phone
- ❑ Pen
- ❑ Calendar
- ❑ Your insurance card/number
- ❑ Your doctor's name and phone number.

YOU

Hello, my name is: (say your name)
I would like to schedule an appointment with Doctor _____

Office Receptionist

What is your date of birth?
What is your insurance number?

Monday March 2nd at 2:00 is available.

YOU

Check Your Calendar. If this day/time is not good for you say:
I can't make that. Do you have another date/time available?
If you need accommodations (like a lift or translator) say:
Can your office accommodate my need for a _____

Office Receptionist

The receptionist will answer your questions as you ask them.
Make sure to write the answers down in your calendar.

YOU

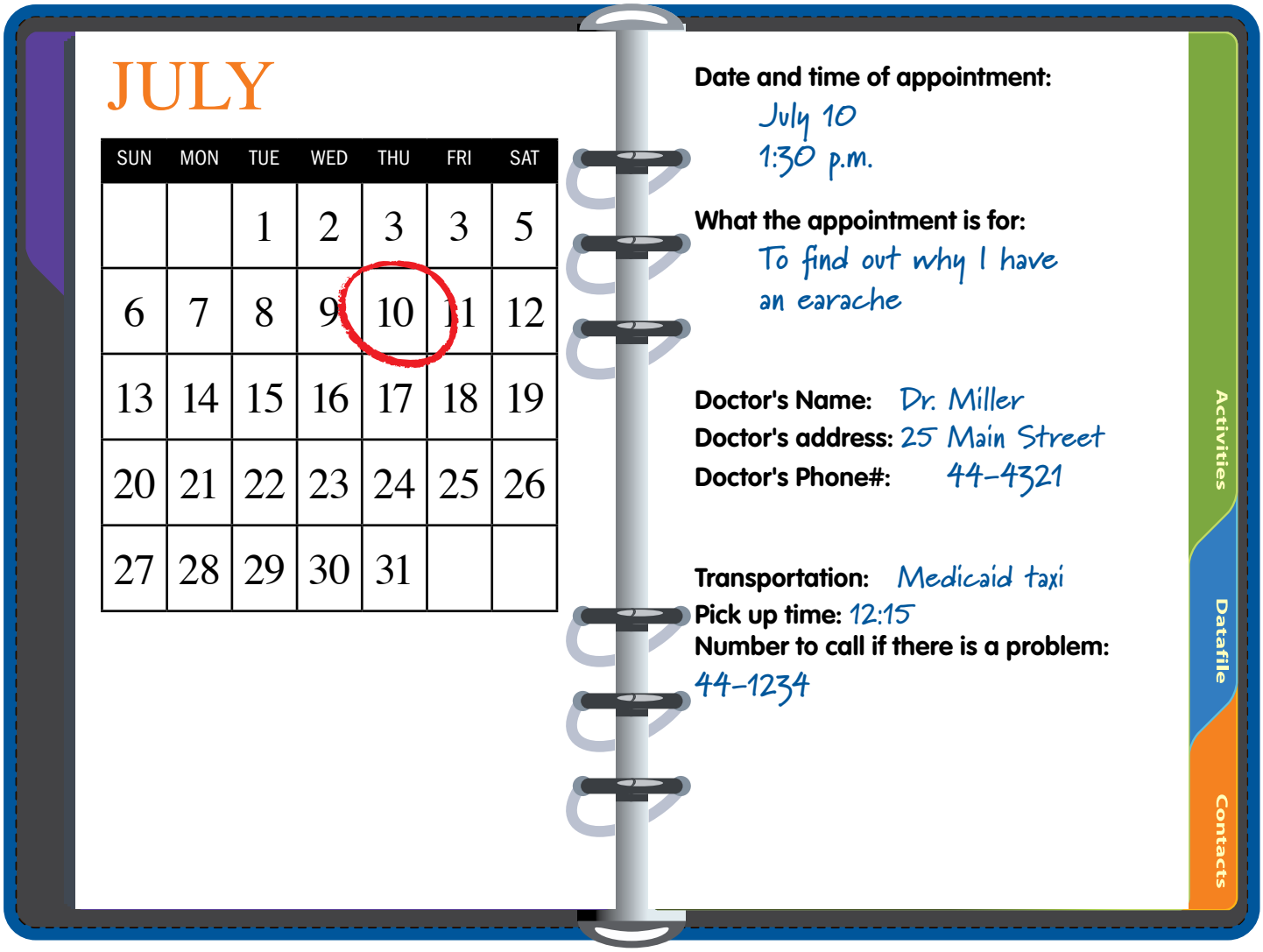
Before you hang up the phone:

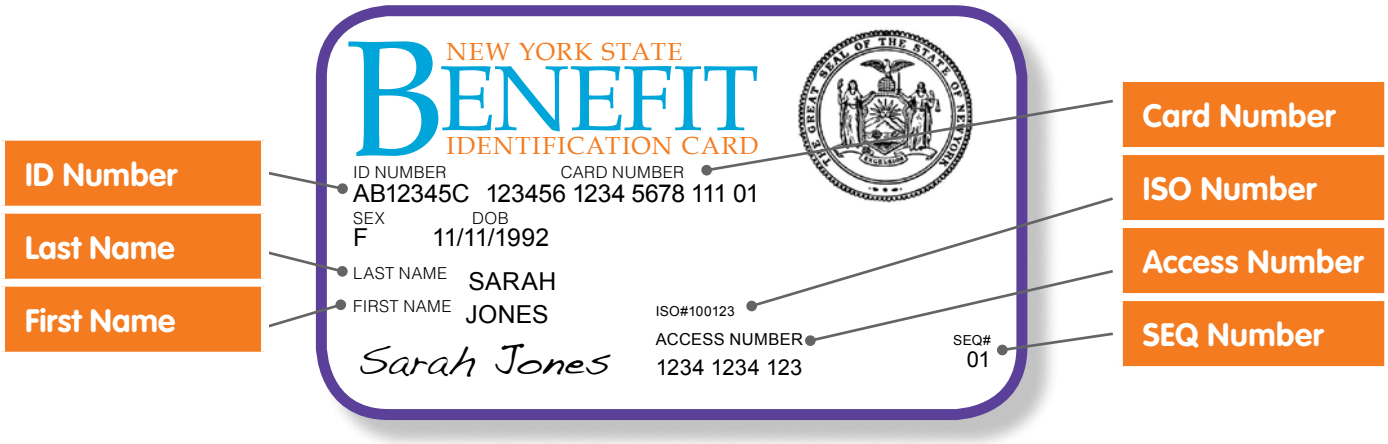
Repeat the information back to the receptionist:
My appointment is with _____on _____

Thank you for your help

How to use the Role-Play Template: Use this template as a script with 2 or more individuals. Cell phones and a calendar or appointment book can be used as props. Individuals may also use the blank template to customize scenarios. Have individuals practice listening and writing down information. Reverse roles and repeat. Use the "confidence meter" before and after each role-play session to track progress.

Calendar • Benefit Card





How to use the Calendar and Benefit Card Use this calendar and benefit card as a guide during role play to practice writing down the date and time of an appointment and to become familiar with your benefit card. There is a blank calendar and an unlabeled Medicaid card at the end of the chapter to practice with, or use your real ones.

RAP

Doctor's visit, time to go
Need to organize so it flows
Got my numbers, got my card
And with practice it's not so hard

Need to tell them how I'm feeling
Ask what day and time they're dealing

Can't forget what I must do
Write down the date and the time too
I'll make that call for a ride
And mark my calendar with what we decide

Now I'm the Master
Using my Skills as a Rapper!

How to Use Rap

Rapping helps auditory learners to become familiar with new vocabulary. Rapping is just a matter of matching the beat with the rhythm of the words. Each beat accents a different syllable. Participants may pick a favorite song or use the sample and create their own beat. After listening to the words, participants clap along to the beat, and start "rapping" with the song.

Chant

Hands up // (silent beats)
For Health // silent beats)
Gonna' name (clap, clap)
Some SCHEDULING SKILLS (clap, clap)
One apiece (clap, clap)
No repeats (clap, clap)
No hesitation (clap, clap)
No duplication (clap, clap)
Starting with (clap, clap)

Named participant responds with a word or idea about the topic.
It's okay for a participant to pass if they so choose.

How to Use the Chant

Participants are seated in a circle. The instructor names a skill topic and demonstrates singing and clapping of the chant. Participants are encouraged to join in with the singing and clapping. As their name is called participants state words or ideas that fit with the topic. Naming moves one-by-one around the circle. Participants may "pass" if they prefer. Process continues until everyone has had an opportunity.

Group Energizers

Standing Ovation
(make an O with arms)

Sitting Ovation

Clam Clap

2 Finger Clap – Opera Applause

Clap and a Half

Micro-wave

High Five

High Five & Ankle Shake

Raise the Roof

Drum Roll

Round of Applause

Pat on the Back

Give Yourself a Hug

Awesome Cheer

Seal of Approval

YES, YES, Y - E - S Cheer

Excellent – Air-Guitar

Two Thumbs Up

WOW (W - 3 fingers, O - open mouth, W - 3 fingers)

Knuckle Knock

Knuckle Knock with attitude

How to use the Group Energizers
For a job well done, participants select a cheer to celebrate hard work and success! Group energizers can be used at the end of a unit, when discussing the "What I Learned" list on the KWL chart, or at any time throughout the session to promote active participation.

COPY AND DISTRIBUTE

KWL Chart

Topic:

What I Know	What I Want to Know	What I Learned

COPY AND DISTRIBUTE

Role Play-Now You Try! Scheduling an Appointment

1. Gather the items you will need to make an appointment at your doctor's office:
2. Using the following script, practice making a phone call with a partner who acts the role of a doctor's office receptionist.
3. Write down the information you receive in your calendar. Reverse roles.

You Will Need:

- ❑ Cell phone
- ❑ Pen
- ❑ Calendar
- ❑ Your insurance card/number
- ❑ Your doctor's name and phone number.

YOU

Office Receptionist

YOU

Office Receptionist

YOU

Make sure you write down all the information

COPY AND DISTRIBUTE

Calendar and Benefit Card

JULY

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	3	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Notes:

Activities

Datafile

Contacts

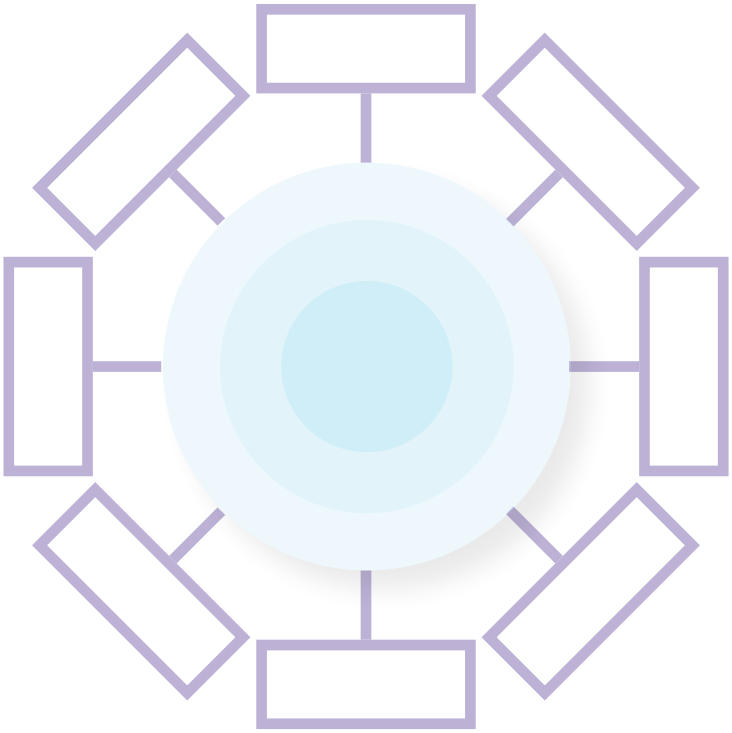
NEW YORK STATE
BENEFIT
IDENTIFICATION CARD

ID NUMBER AB12345C
CARD NUMBER 123456 1234 5678 111 01
SEX F
DOB 11/11/1992
LAST NAME SARAH
FIRST NAME JONES
Sarah Jones
ISO#100123
ACCESS NUMBER 1234 1234 123
SEQ# 01

How to use the Calendar and Benefit Card Use this calendar and benefit card to practice with, or use real ones.

COPY AND DISTRIBUTE

Mind Map - Now You Try



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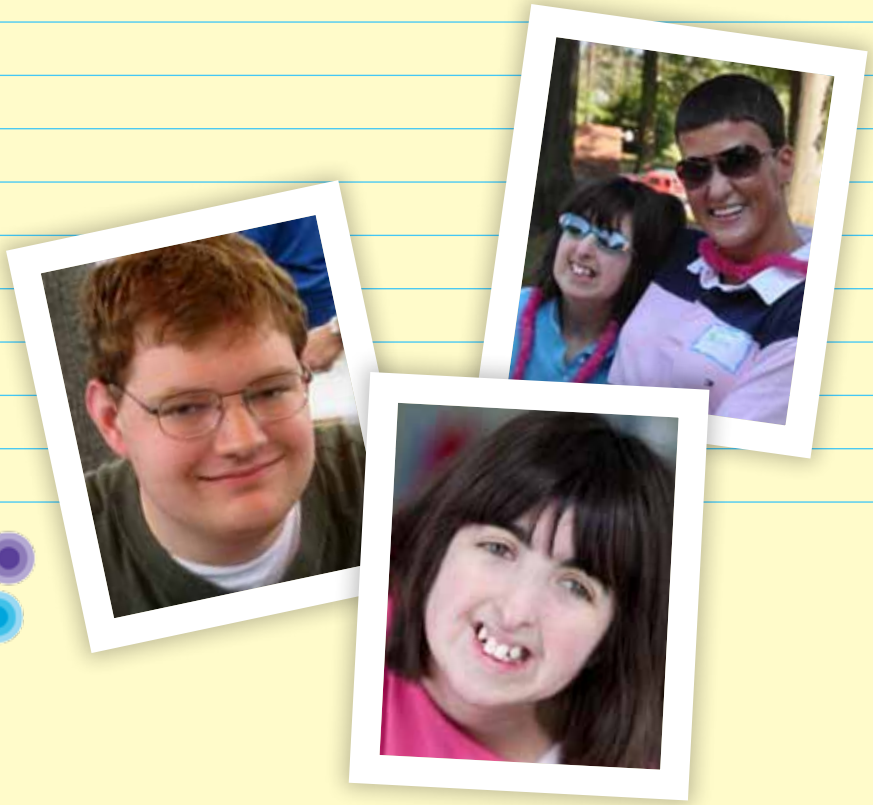
CONGRATULATIONS!

Has Successfully Learned Skills for Scheduling an Appointment



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Design by Holly Scherzi Design Syracuse, NY