



## **Medical Note-taking for Members by LOWLINC Volunteers**

### **Helping Members Stay in Charge of Their Health Care**

#### Purpose for Requesting a Note-taker:

- To help members document the details of their medical appointments; e.g.:
  - New medications
  - Diagnostic tests
  - Diagnosis
  - Follow-up
- To have notes for reference and follow-up
- To have notes to share with family or another individual if designated by the member

#### Role of a Trained LOWLINC Volunteer Note-taker:

- Clarify the role of medical note-taker for the member
- Listen and write
- Serve as a resource for the member
- Ask for clarification when appropriate
- Help member to recall vital information
- Not in a role of advocate
- Maintain confidentiality as stated in Member and Volunteer agreements

#### Responsibility of the Member:

- Talk with assigned note-taker prior to medical appointment
  - Share concerns and pertinent questions with note-taker prior to the visit
  - Discuss mutual expectations
- Refer to Health Matters Toolkit to prepare for the visit
  - Note changes since last visit
  - Gather information to take with you
  - Share information with your healthcare provider
  - Ask questions
- Introduce the medical note-taker to the receptionist and healthcare provider
- Give permission to have note-taker in room with health care provider if requested
- Designate if a family member or another individual is to receive a copy of the notes

#### Follow-up to the Medical Appointment:

- Volunteer shares notes with the member
- Discussion between member and medical note-taker
  - Review major points
  - Clarify member's decision regarding sharing of the notes with a designated person
- Leave notes with the member and/or share as designated
- Volunteer destroys any copies of notes