

## Help Clients Navigate Primary Care: Case Manager Checklists

### Support a Client to Call Their PCP

*A client may need to call their PCP office to check labs, schedule or ask a question.*

#### 1. BEFORE THE CALL

- Review reason for call with client
- Help client determine ONE question to ask
- Gather relevant information, e.g., client DOB, insurance information, case numbers, RXs
- Write down the ONE question
- Encourage client to practice the question
- Prepare to take notes during the call

#### 2. DURING THE CALL

- Encourage client to:
  - Identify themselves
  - Ask the ONE question they practiced
  - Stay cordial even when stressed
  - Ask for their clinic contact (if applicable)
- Take notes on who was talked to, information received, and next steps

#### 3. AFTER THE CALL

- Briefly summarize notes in chart
- Develop next steps with client

### Accompany a Client to a PCP Visit

*Primary care or other medical offices can be confusing or overwhelming. A client may need your help to stay calm and organized if a visit becomes stressful or triggering.*

#### 1. BEFORE THE VISIT

- Call client the day before to check on:
  - Travel plans, arrival and visit times
  - Funds for transport, co-pays, RXs
  - Purpose of visit
  - Items to bring to visit
  - How client is doing
- Prepare with client:
  - Diabetes: glucometer, food diary, glucose logs
  - Hypertension: blood pressure readings
  - Current medication list or bottles
  - Recent lab test results, especially from psychiatric provider
  - Recent hospital discharge summary
  - Future specialty visits
- Write down how client is doing:
  - New or ongoing problems?
  - How manageable is the care plan?
  - Diagnosis or treatment questions?
  - Other relevant information?

#### 2. DURING THE VISIT

- Support client with check-in, as needed
  - Greet office staff, remind of your role
  - Offer items brought to visit
- Look for and avoid possible triggers in waiting area when sitting with client
- Offer to join client in exam room
- If in exam room, share notes on how client is doing (only if client needs help)
- Review printed summary/plan with client; ensure you *both* understand
- Assist client with next steps per plan e.g., schedule next visit, lab testing, pick up RXs
- Plan next contact with client and write details for them, e.g., when, where, who
- Ensure client has transport home

#### 3. AFTER THE VISIT

- Report updates to team or supervisor
- Update psychiatric provider if more urgent or if medication change planned