

MEDICAL INTAKE VOLUNTEER

Position Summary:

The Medical Intake Interviewer meets with patients to take vital signs and essential information regarding patients' visits. **This visit should take no more than 10 minutes.** **You do not need a "note" for this intake.**

RESPONSIBILITIES FOR MEDICAL INTAKE INTERVIEWER:

PART 1: UPON ARRIVAL

- ✓ Sign-in in the computer and get your name badge
- ✓ Check the posted clinic assignments near the sign in computer for the room assigned to you and then check in with the exam room coordinator for which patient to take first

PART 2: GETTING STARTED

- ✓ **Obtain the patient's chart** from racks on at nurse's station. Ask the **Exam Room Coordinator** for direction on which chart to take.
- ✓ **Review the cover sheet on the chart**, especially the "**Intake**" section, as the primary nurse may leave notes for the Intake Interviewer.
 - **NOTE:** The primary nurse may leave cards for future appointments, envelopes, or other information on the front of the chart for the patient. If so, please **give them to the patient.**
- ✓ Determine if **interpreter services** are necessary. Preference should be given to volunteer interpreters, if available, then to adult family members. AFC also has a **language line service**. If the patient does not understand you and has not brought an interpreter, talk to the Clinic Coordinator. She can show you how to use the language line. The patient cannot be seen if the staff cannot safely communicate with him or her.
- ✓ **Call the patient** from waiting room and **introduce** yourself.

PART 3: THE INTAKE SESSION: COMPLETE ALL OF THE FOLLOWING STEPS:

On **HealthState** under **Vital Signs**:

- 1) Check the patient's **weight**
- 2) Check the patient's **height** (if first visit).
- 3) Take the patient to the exam room.

ID & PATIENT INFORMATION

- 4) **Verify the identity of the patient:** Look up patient in HealthState. Obtain patient's ID card and crosscheck information against chart information and HealthState. If the patient forgot his or her ID, ask for photo ID. **The goal is to ensure that the patient being seen matches the HealthState file and chart.**

- 5) Make sure that the **patient's name** and **date of birth** are written correctly on chart. Many patients have hard-to-pronounce names or similar names; coupled with language barriers, this can sometimes be confusing. **Note any corrections on the cover sheet.**
- 6) Ask patient for **current telephone number and email address**. Note both on coversheet.
- 7) Check that **patient eligibility status** is current. If not current, refer to Clinic Administrator.
- 8) Ask the patient the **reason** for the visit and note it in the **Intake Section**. If the patient's reason is significantly different from the reason printed on the coversheet, talk to the Clinic Coordinator.

VITALS

- 9) Take vital signs including **blood pressure** and **pulse**. Notify Clinic Coordinator if blood pressure is above 150/90.
- 10) Take **temperature** if patient shows signs of fever or infection. The thermometer is located at the Exam Room Coordinator's station.
- 11) **Hospitalizations:** Make a note on the cover sheet if the patient has been to the Emergency Room or in the hospital since last appointment. Note the reason for the visit and the date of visit.
- 12) If there is a note on the cover sheet that says **NEED LABS**, check if the labs are on the chart or in the Import files. If not, notify the Clinic Coordinator.
- 13) **Review current medications** with the patient by comparing medication list in HealtheState to the prescription bottles that the patient confirms/denies taking or that the patient brings to the visit. **Note any discrepancies** on the cover sheet in the provider section.
- 14) Ask **Mental Health Screening questions**, if indicated (orange sheet attached by nurse to chart/intake notes). Note on Prevention Screen that screening was completed.
- 15) **Prevention Screen:** Obtain and document the following patient information on the Prevention Screen:
 - ✓ Allergies
 - ✓ Family history, if incomplete. **DO NOT CHECK** the "No Family History" box. Instead, to indicate that there is no family history, make a note in the box marked OTHER.
 - ✓ Alcohol, tobacco, caffeine and street drug use.

PART 4: AFTER THE INTAKE

- If the patient has **questions** that you are unable to answer, check with Clinic Coordinator or Exam Room Coordinator for assistance.
- Remind the patient to **remain in the waiting area after seeing the doctor** so that the discharge nurse can review the visit with the patient and give the patient prescription cards, referrals, appointment cards, and other information.
- Ask the patient to **return to the waiting area** and ask patient to **wait** until called.
- **Give the chart** to the Exam Room Coordinator and tell him the intake is complete

WHEN YOU LEAVE BE SURE TO CHECK OUT ON COMPUTER

Updated 2/13/17