

This is an optional checklist for staff to use to assist them prepare for, support the person during, and complete required actions after a general health appointment with their GP, Allied Health Professional or Specialist.

For the Annual Health Assessment, use the [NDIS LWB 5511 Annual Health Assessment - Checklist](#).

Scheduling the Health Appointment			
✓	Action	Further Information	Notes
<input type="checkbox"/>	Discuss reason for appointment with the person we support	Use relevant communication style (as needed)	
<input type="checkbox"/>	Check who is the best person to accompany the person we support	The person we support / team to advise	
<input type="checkbox"/>	Confirm best time of day for appointment	Refer to the person's daily / weekly routine	
<input type="checkbox"/>	Confirm whether Authorised Decision Maker should attend	Identify the person's Authorised Decision Maker (if they have one)	
<input type="checkbox"/>	If yes, confirm availability of Authorised Decision Maker		
<input type="checkbox"/>	Assist the person to make appointment / make appointment on their behalf	Record in Diary, create reminders to relevant staff in Outlook Calendar	
<input type="checkbox"/>	Inform the person we support, all Staff and the Authorised Decision Maker (if relevant) of the appointment.		

Preparing for a General Health Appointment			
✓	Action (as relevant)	Further Information	Notes
<input type="checkbox"/>	Check the 5502 Health and Wellbeing Plan is up to date		
<input type="checkbox"/>	Check whether blood testing is needed prior	Refer to previous health appointment notes	
<input type="checkbox"/>	If yes, note whether fasting is required, and date test should be completed by – allowing for 2-3 days for results.	Advise staff via Communication book, create Outlook Calendar Alert	
<input type="checkbox"/>	Is a referral letter needed? If so, does the person we support have referral / is current referral still in date or need renewing?	Check referrals for relevant dates	
<input type="checkbox"/>	Confirm if Medicare Card or health Care Card is needed for appointment	If appointment is at new health facility / GP	
<input type="checkbox"/>	Confirm if the appointment will need to be paid for and take cash or ATM card.	Call GP office to confirm amount if required.	

Preparing for a General Health Appointment			
<input type="checkbox"/>	<p>Gather the following documents (as relevant):</p> <ul style="list-style-type: none"> <input type="checkbox"/> Completed Health Recording charts <input type="checkbox"/> 5503 Health Appointment Record printed or (via USB/email) <input type="checkbox"/> Compact Medication Chart <input type="checkbox"/> Medication Record <input type="checkbox"/> PRN Protocol template <input type="checkbox"/> Test results <input type="checkbox"/> Referral <input type="checkbox"/> LWB Health Support Plan(s) <input type="checkbox"/> LWB Health Support Plan templates (or via USB/email) 		

During the Health Appointment				
✓	Tasks for Health Professional	Further Information	Occurred	Comment (if No was selected)
<input type="checkbox"/>	Complete the Health Appointment Record or provides a written report with appointment outcome and actions	Ensure Health Professional has a copy of the 5503 Health Appointment Record (ideally electronically) to complete	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Complete reviews and update signatures and dates of any developed or reviewed health support plans	Ensure relevant plans are made available for review	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Review completed health recording charts	Ensure completed, relevant recording charts are made available for review	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Provide referrals as required		<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Update Compact Medication Chart and Medication Record if relevant	Ensure Compact Medication Chart and printed copy of Medication Record with previous entries is made available for updating.	<input type="checkbox"/> Yes <input type="checkbox"/> No	
<input type="checkbox"/>	Advise whether services of a Clinical Nurse are required		<input type="checkbox"/> Yes <input type="checkbox"/> No	

After the Health Appointment			
✓	Action (as relevant)	Further Information	Notes
<input type="checkbox"/>	Take new scripts to pharmacist	Ensures Medications are current	
<input type="checkbox"/>	Obtain new Webster Pak(s) / non-packed medication		
<input type="checkbox"/>	Obtain CMI sheet(s) for new medication(s)	Consumer Medicine Information	
<input type="checkbox"/>	Update the Health Action Plan within 5502 Health and Wellbeing Plan.		
<input type="checkbox"/>	Inform Authorised Decision Maker of appointment outcome	If they did not attend appointment	
<input type="checkbox"/>	Inform all staff of appointment outcome and list actions to be taken in Health Action Plan section of the Health and Wellbeing Plan.	Communication Book, Progress Notes	
<input type="checkbox"/>	Update NDIS LWB 5561 Hospital Support Plan and Hospital Folder		
<input type="checkbox"/>	Add agenda items to next Team Meeting	Discuss important details and actions if necessary	
<input type="checkbox"/>	Schedule appointments with any other Health Professionals or Clinical Nurse referred to		
<input type="checkbox"/>	Upload updated documents to CIRTS including completed Health Appointment Record; new / updated / reviewed Health Support Plans; updated Medication Record; and new Reports		