

August 2023

**Office of Health & Safety
Network Supports**



The Annual Healthcare Visit Toolkit



Regular annual healthcare visits with a primary care provider (PCP) are an important, evidence-based, part of well-being and are focused on health, fitness, and preventive care, not just addressing illness or problems.

The **Annual Healthcare Visit Toolkit** is meant to bolster identified factors which improve the quality of healthcare individuals with developmental disabilities (DD) receive by using documents developed to streamline all steps of the process which include:

- **Pre-visit preparation and planning.**
 - W-1 Pre-Visit Checklist.
 - W-10 Annual Healthcare Visit.
 - W-11 Annual Healthcare Visit Preventive Screening Checklist.
- **Health literacy and learning.**
 - W-2 Common Healthcare Abbreviations.
 - W-3 Common Lab Tests.
 - W-4 Body Mass Index (BMI) Chart.
- **Advocacy and communication.**
 - W-5 DBHDS My Care Passport.
 - W-6 Consent Tip Sheet.
 - W-7 Medicaid Waiver Tip Sheet.
 - W-8 Discharge Tip Sheet.
- **And post-visit follow-up and maintenance.**
 - W-9 Post-Visit Checklist.

These tools can help caregivers navigate the healthcare system more effectively and efficiently resulting in better outcomes for individuals with DD (5) (1) (3) (4) (2).

The annual healthcare visit toolkit documents are available for download and use on the DBHDS Office of Integrated Health's website under Educational Resources at <https://dbhds.virginia.gov/office-of-integrated-health/>

Will each individual's toolkit contain the same documents?

No. The documents chosen will vary from one individual to the next, as no two individuals are exactly alike. The toolkit for each individual should be person-centered and its content tailored to meet their age and gender.

What additional toolkits are planned?

Dental Visit Toolkit

Behavioral Health Consult Toolkit

Durable Medical Equipment Toolkit

Physical Therapy/Occupational Therapy Consult Toolkit

Contents List

- The content list has a key at the top of the page of a printer and a pencil symbol with the instruction to print and complete prior to the appointment.
- These symbols appear next to the suggested basic documents which would apply to most individuals.
- The content list includes links to the Centers for Disease Control and Preventions (CDC) recommended immunization schedules on their website.
- New forms may be added to each section.

Toolkit Instructions

- The toolkit instructions review each form in detail.
- It walks the caregiver through step-by-step directions on how to complete each form and its use.
- The instructions help caregivers to decide whether or not a particular form will be useful during the annual healthcare visit.

The Forms

- **W-1** The Pre-Visit Checklist will help streamline the annual healthcare visit.
- **W-2** Common Healthcare Abbreviations are frequently used throughout the healthcare system.
- **W-3** Common Lab Tests are frequently ordered laboratory tests by a PCP.
- **W-4** The Body Mass Index (BMI) Chart is used to compare the ratio of someone's height to weight in order to estimate their body fat percentage.
- **W-5** The DBHDS My Care Passport is a document which assists caregivers to share important information about the individual with DD with the PCP and other healthcare professionals.
- **W-6** The Consent Tip Sheet is a document to assist healthcare professionals understand surrogate decision makers for persons who lack the ability to make decisions for themselves.
- **W-7** The Medicaid Waiver Tip Sheet briefly explains what a Medicaid Waiver is and gives descriptions of each type of waiver.
- **W-8** The Discharge Tip Sheet outlines the requirements for prescription/orders under the waiver system for medications, treatments, protocols, or durable medical equipment.
- **W-9** The Post-Visit Checklist is to streamline the follow-up after an annual healthcare visit.
- **W-10** The Annual Healthcare Visit - PCP Appointment Form is for caregivers to take with them to the visit to share information and organize instructions.
- **W-11** The Annual Healthcare Visit Preventive Screening Checklist is for tracking recommended healthcare screening tests for adult with DD.

References

1. Brolan, C. E., Boyle, F. M., Dean, J. H., Gomez, M. T., Ware, R. S., & Lennox, N. G. (2012, November). Health advocacy: a vital step in attaining human rights for adults with intellectual disability. *Journal of Intellectual Disability Research*, 56(11), 1087–1097. Doi: 10.1111/j.1365-2788.2012.01637.x
2. Durbin, J., Selick, A., Casson, I., Green, L., Perry, A., Abou Chacra, M., & Lunskey, Y. (2019). Improving the quality of primary care for adults with intellectual and developmental disabilities: Value of the periodic health examination. *Canadian Family Physician*, 65(Suppl 1), S66-S72.
3. Smith G, Ouellette-Kuntz H, Green M. (2018, April). Comprehensive preventive care assessments for adults with intellectual and developmental disabilities. Part 1: How do we know if it's happening? *Can Family Physician*, 64 (Suppl 2):S57–S62.
4. Romaniuk, H. C., & Ausderau, K. K. (2018). Understanding health disparities for individuals with intellectual disability using photovoice. *Scandinavian Journal of Occupational Therapy*, 25(5), 371-381.
5. Melville C., Finlayson J., Cooper S.-A., Allan L., Robinson N., Burns E., Martin G. & Morrison J. (2005) Enhancing primary health care services for adults with intellectual disabilities. *Journal of Intellectual Disability Research* 49, 190–198



ABA Snippets ...

Risk-Benefit

A risk-benefit analysis is an essential element of a behavior support plan that weighs the risks versus the benefits of an assessment or intervention (3). This may seem obvious if the plan calls for intensive or restrictive interventions. It is less obvious for more common or seemingly mild assessments and interventions.

However, according to Bailey and Burch (1), "All behavioral procedures, including those that are benign (such as positive reinforcement), have risk factors associated with them" (p.232). Bailey and Burch (2) add, "While we do not always discuss it, whenever consequences are used to change behavior there are always some risks involved" (p. 153).

Consider a scenario in which an intervention using positive reinforcement is not written correctly, followed correctly, and/or trained correctly. These scenarios could easily result in bribery, along with the unintended impact of bribery including prompt dependency (5).

The following resources will help with conducting a risk-benefit analysis.

Deochand et al. (4), recommend a functional analysis decision-making tool involving four domains: clinical experience, environment, support staff, and behavior intensity. The interactive tool is easy to use and included open-access with the article. Here is a link: [Toward the Development of a Functional Analysis Risk Assessment Decision Tool | SpringerLink](#)

Bailey and Burch (1) offer four-domains to assess risks and benefits of behavioral treatment and/or assessment: general risk factors for behavioral treatment, benefits of behavioral treatment, risk factors for each behavioral procedure, and reconciliation of the risks and benefits with key parties involved.

You may contact DBHDS about these efforts via the following: brian.phelps@dbhds.virginia.gov

References

1. Bailey, J. S., & Burch, M. R. (2016). Ethics for behavior analyst's 3rd edition. Routledge.
2. Bailey, J. S., & Burch, M. R. (2022). Ethics for behavior analyst's 4th edition. Routledge.
3. Cooper, J.O., Heron, T.E., & Heward, W.L. (2020). Applied behavior analysis: third edition. (pp.771-772). Pearson Education, Inc.
4. Deochand, N., Eldridge, R., & Peterson, S.M. (2020). Toward the development of a functional analysis risk assessment decision tool. Behavior Analysis in Practice, 13(4), 978-990.
5. Leaf, R., McEachin, J. (1999). A work in progress: Behavior management strategies and a curriculum for intensive behavioral treatment of autism. (pp. 23-24). DRL Books, LLC

Choking is an EMERGENCY situation!

Especially for individuals with developmental disabilities (DD). It is important for all provider agency staff and caregivers to be trained and prepared to immediately respond to a choking emergency.

It can mean life or death for the individual with DD depending on how a caregiver responds during a choking emergency.

Regular practice and review of the correct response to a choking emergency has been shown to save lives.

The following links to the American Red Cross YouTube videos are good reviews on how to respond in a choking emergency:

<https://www.youtube.com/watch?v=OISCCAMogfQ&pp=ygUxdW5jb25zY2lvdXMgb2JzdHJ1Y3RlZCBhaXJ3YXk7IGFtZXJpY2FulHJlZCBjcm9zcw%3D%3D>

<https://www.youtube.com/watch?v=83wY3uCNsrs&pp=ygUxdW5jb25zY2lvdXMgb2JzdHJ1Y3RlZCBhaXJ3YXk7IGFtZXJpY2FulHJlZCBjcm9zcw%3D%3D>

All individuals with DD, who have the ability, should be taught the universal sign for choking, which can help them communicate if they experience a choking emergency.



The
Universal
Choking
Sign

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Wednesday, October 18, 2023 between 8:30 am – 4:30 pm
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<https://www.eventbrite.com/e/4th-annual-statewide-nursing-conference-tickets-609747199287>

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