

HEW Name \_\_\_\_\_

Client Name \_\_\_\_\_

## Client Care Checklist

Use a new checklist for each client you see. Check off each step as you complete it.

### 1. WELCOME

- |  |  |
|--|--|
| <input type="checkbox"/> Greet your client and make them comfortable | <ul style="list-style-type: none"><li>• Shut the door</li><li>• "How are you today?"</li><li>• "How is your family?"</li></ul> |
| <input type="checkbox"/> Find and review your client's health card   | <ul style="list-style-type: none"><li>• Date of last appointment</li></ul>   |
| <input type="checkbox"/> Ask questions to learn about your client    | <ul style="list-style-type: none"><li>• "How are you feeling today?"</li><li>• "What are you here for today?"</li></ul>        |

### 2. PROVIDE SERVICES

Services Provided (check all that apply):

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> Family Planning | <input type="checkbox"/> Vaccination |
| <input type="checkbox"/> Prenatal        | <input type="checkbox"/> Acute Care  |
| <input type="checkbox"/> Antenatal       | <input type="checkbox"/> Other...    |

### 3. SCHEDULE RETURN APPOINTMENT (if needed)

- |  |  |
|--|--|
| <input type="checkbox"/> Set the return appointment date   | <i>How to set a return appointment date:</i>   |
| <ul style="list-style-type: none"><li>• What is it? _____</li></ul>                              | <ol style="list-style-type: none"><li>1. Determine the timeframe when the client should return</li><li>2. Ask the client what days he/she prefers</li><li>3. Consult your planning calendar to find the week of the appointment</li><li>4. Schedule the appointment for your "appointment day" that week</li></ol> |
| <input type="checkbox"/> Provide instructions for care or follow-through in-between appointments |  |

### 4. UPDATE CLIENT RECORDS

- Update client card to record the services provided
- Record return appointment (if needed) on client card
- File the client card in the Tickler File
  - If return appointment – file in monthly slots
  - If no return appointment – file in general shelves

HEW Name \_\_\_\_\_

Client Name \_\_\_\_\_

Date \_\_\_\_\_

## Client Care Checklist

Use a new checklist for each client you see. Mark each step complete  after you finish it.

### BEFORE PROVIDING SERVICES

Welcome client and make them comfortable

- "How are you today?"
- "How is your family?"

Find and review client's health card

What is your client here for today?

- Family Planning (*use counseling guides*)
- Prenatal
- Antenatal
- Vaccination
- Acute Care
- Other \_\_\_\_\_

When was the date of their last appointment?

\_\_\_\_\_

### ~PROVIDE SERVICES~

### AFTER PROVIDING SERVICES

Does the client need a return appointment?

No       Yes - Date \_\_\_\_\_

Provide instructions for what to do between appointments

Record services provided on client card

Record return appointment on client card

File the client card in the Tickler File

- If return appointment – file in monthly slots in the Tickler File
- If no return appointment – file in general shelves

#### **How to set a return appointment date:**

1. Determine the timeframe when the client should return
2. Ask the client what days he/she prefers
3. Consult your planning calendar to find the week of the appointment
4. Schedule the appointment for your "appointment day" that week

# Client Care Checklist

## 1. WELCOME

- Greet your client and make them comfortable
- Find and review your client's health card
- Ask questions to learn about your client

- "How are you today?"
- "How is your family?"
- "What are you here for today?"
  
- Appointment date?
- Is client on-time?

## 2. PROVIDE SERVICES (refer to counseling guides for greater detail)

- Explore:** Ask about client needs and health goals
- Screen:** Review health history and check vitals
- Decide:** Discuss treatment options
- Provide:** Explain services and what to expect after provision

## 3. SCHEDULE RETURN APPOINTMENT (if needed)

**Come back to the Health Post on:**

\_\_\_\_\_

*(appointment date)*

\_\_\_\_\_

*(holiday close to this date)*

On the morning of your appointment, call or text to confirm you are coming:

\_\_\_\_\_

*(name) (cell)*

\_\_\_\_\_

*(name) (cell)*

### **How to set a return appointment date:**

1. Determine the timeframe when the client should return
2. Ask the client what days he/she prefers
3. Consult your planning calendar to find the week of the appointment
4. Schedule the appointment for your "appointment day" that week

- Provide instructions for care or follow-through between appointments

## 4. UPDATE CLIENT RECORDS

- Record services provided on client card
- Record return appointment (if any) on client card
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