



qualOT of life

# From Confusion to Confidence

MASTERING HEALTHCARE AS A CAREGIVER

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Founder of qualOT of life



# INTRODUCTION

- At qualOT of life, we empower caregivers, aging adults, and individuals with chronic conditions to navigate the healthcare system with confidence.
- Through personalized, client-centered care, we enhance quality of life and promote advocacy for those who need it most.
- Founded by Dr. Lyndi, a Doctor of Occupational Therapy, our mission is to make healthcare more accessible and empowering for all.



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# PRESENTATION OBJECTIVES

- Understand key patient rights that empower your advocacy
- Learn the “Do’s” & “Don’ts” of effective healthcare navigation
- Take home a practical tool you can use at your next appointment



**WHAT'S YOUR BIGGEST  
CHALLENGE WHEN ADVOCATING  
FOR YOUR LOVED ONE IN THE  
HEALTHCARE SYSTEM?**

# THE CAREGIVER REALITY

You're managing complex healthcare...

for someone else

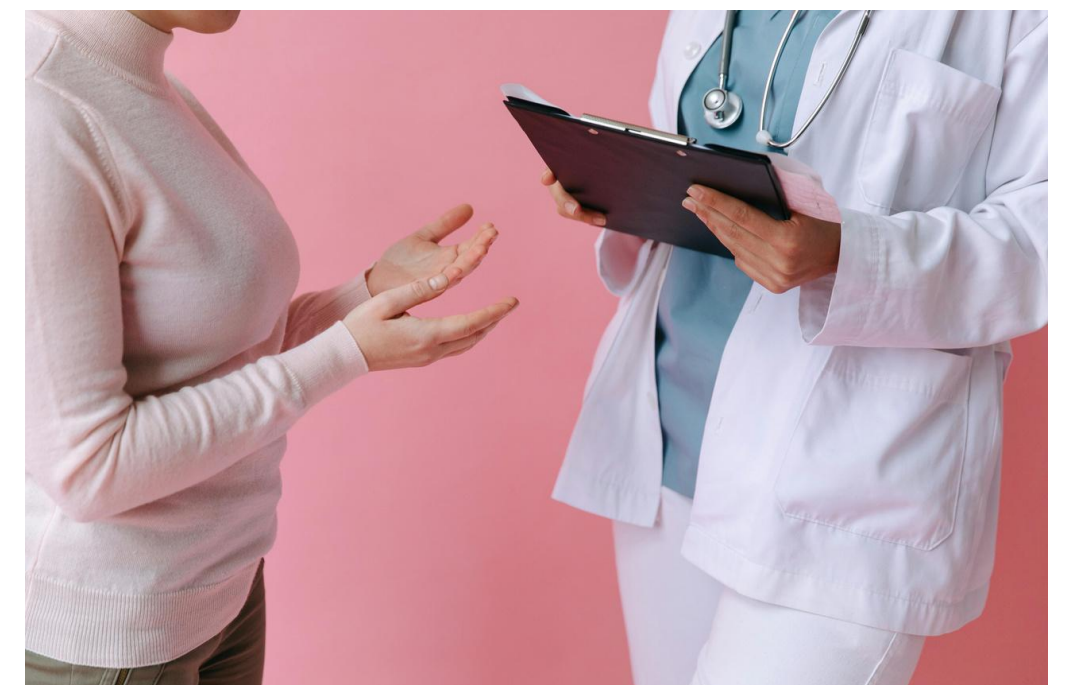
You're coordinating multiple providers...

while juggling your own life

You're making critical decisions...

often without enough information

You're advocating for quality care...



# WHY CAREGIVER ADVOCACY MATTERS

## BETTER HEALTH OUTCOMES

Your loved one receives more personalized, appropriate care.

## FEWER MEDICAL ERRORS

You catch mistakes and fill in gaps providers might miss.

## IMPROVED COMMUNICATION

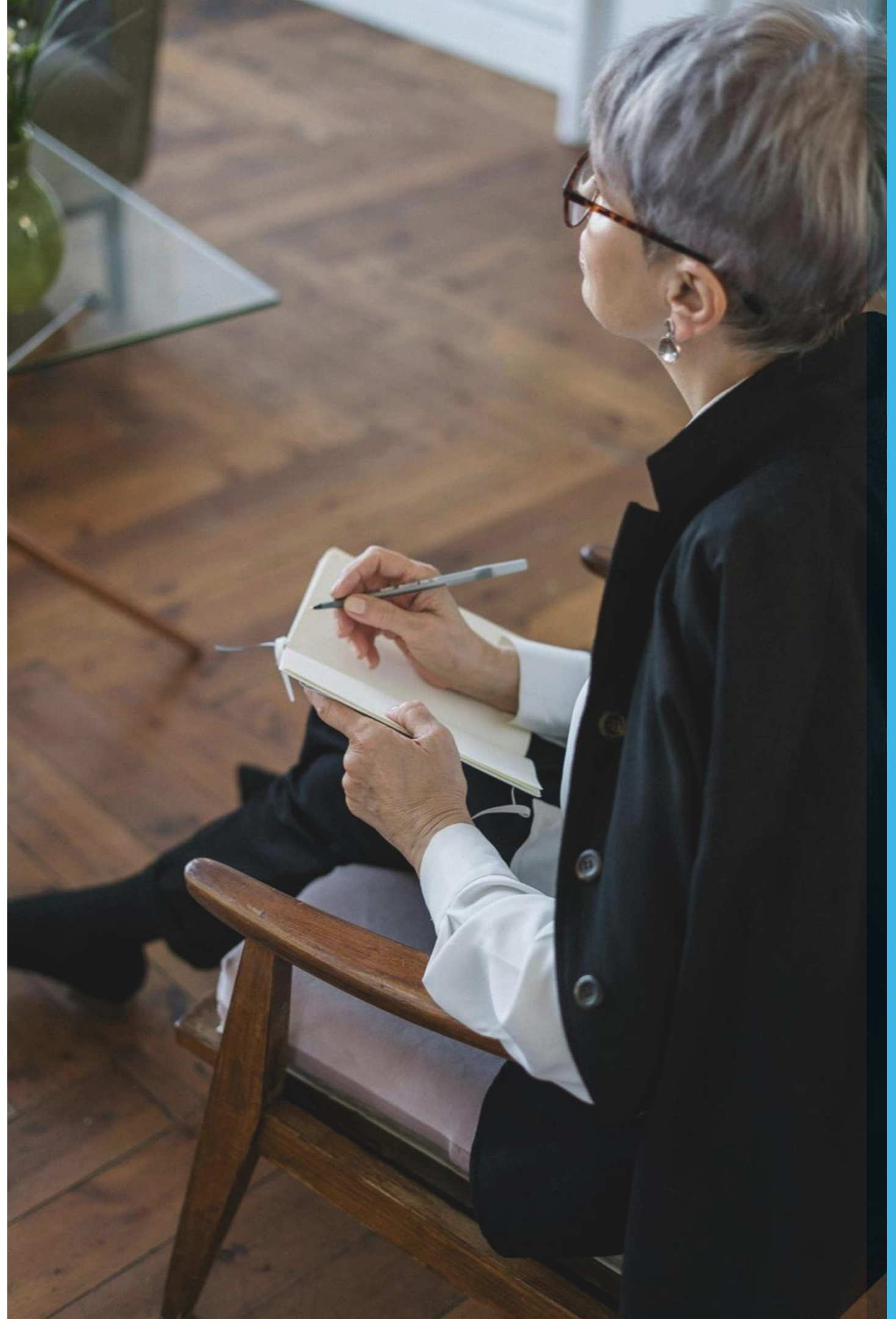
You bridge the gap between patient and healthcare team.

## PEACE OF MIND

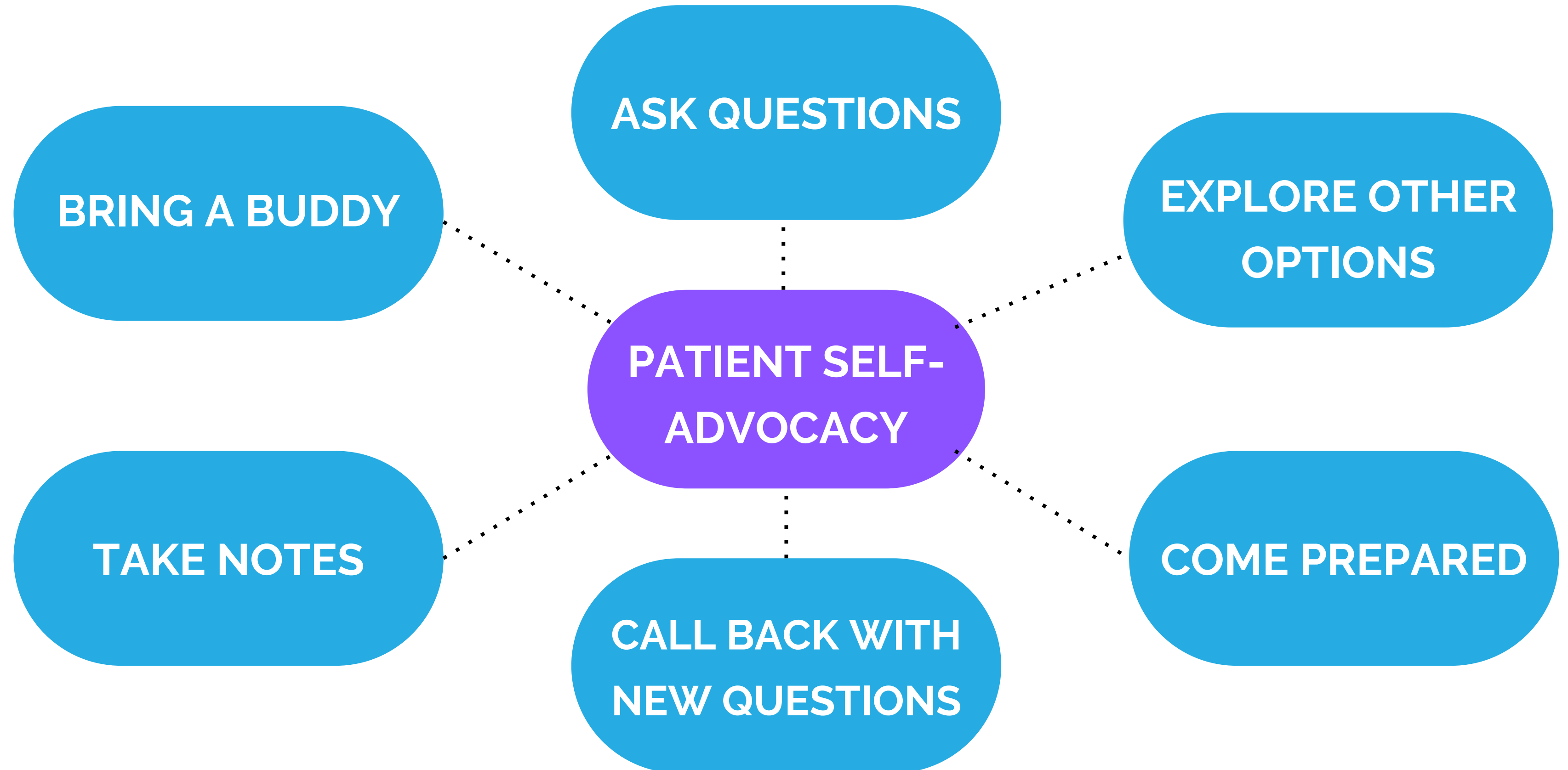
You know you're doing everything possible for their well-being.

# KEY PATIENT RIGHTS

- ✔ Right to Informed Consent
- ✔ Right to Access Medical Records
- ✔ Right to Privacy
- ✔ Right to Ask Questions & Get Clarification
- ✔ Right to Refuse Treatment



# THE “DO’S” OF EFFECTIVE SELF-ADVOCACY



# THE “DON'TS” OF HEALTHCARE NAVIGATION

## Don't Assume...

- ✘ Your healthcare providers know (or remember) everything about your loved one's past medical history, medications, or daily life.
- ✘ You can rely on memory alone during doctor's visits.
- ✘ There are no resources available to help you.
- ✘ Waiting for something bad to happen is the best course of action.

# Doctor's Visit Organizer

A simple tool that puts all these advocacy principles into action.



# Doctor's Visit Organizer

NAME:

DATE OF APPOINTMENT:

PROVIDER'S NAME & SPECIALTY:

REASON FOR VISIT/ CONCERNS:

QUESTIONS FOR DOCTOR:

APPOINTMENT NOTES:

FOLLOW UP/ ACTION ITEMS:

## Four Simple Sections:

1. Reason for Visit/ Concerns
2. Questions for Doctor
3. Appointment Notes
4. Follow Up/ Action Items

ORGANIZER  
CREATED BY



**qualOT of life**

PERSONALIZED HEALTH COORDINATION  
FOR EMPOWERED, CONFIDENT LIVING

816-533-5743

[www.qualOToflife.com](http://www.qualOToflife.com)

# SECTION 1: REASON FOR VISIT/ CONCERNS

REASON FOR VISIT/ CONCERNS:

-Discuss hyperthyroidism management plan

-Symptoms (last 4 weeks):

- neck pain & ear pressure
- low energy
- not sleeping
- tightness in jaw

-Getting a custom mouth

What to include BEFORE the appointment:

- Main reason for today's appointment
- Symptoms: when they started, how often you experience them, getting better/worse, treatments attempted
- Recent changes (health, mood, sleep, appetite, mobility)
- Concerns about new or ongoing symptoms
- Impact on daily life

# SECTION 2: QUESTIONS FOR DOCTOR

## QUESTIONS FOR DOCTOR:

- Is thyroid medication still doing what it is supposed to?
- Could thyroid problems be causing the neck pain/ ear pressure/ jaw tightness?
- Should an endocrinologist be someone I see regularly?

## What to include BEFORE the appointment:

- Questions about test results or diagnosis
- Medication concerns or side effects
- Treatment options and alternatives
- What to expect next
- How this impacts daily activities
- When to call with concerns

# SECTION 3: APPOINTMENT NOTES

## APPOINTMENT NOTES:

- Hyperthyroidism can turn into hypothyroidism
- Thyroid gland is enlarged
- Enlarged thyroid can cause neck tightness and potentially ear pressure, but not likely to cause jaw tightness
- Should see endocrinologist to manage thyroid annually

## What to include DURING the appointment:

- Doctor recommendations, instructions, and answers to your questions
- Tests ordered (labs, imaging, screenings)
- Medications to start, stop, or adjust
- Lifestyle changes (diet, exercise, routines)
- Referrals to other providers

# SECTION 4: FOLLOW UP/ ACTION ITEMS

## FOLLOW UP/ ACTION ITEMS:

1. Make next appointment 4 months from today- Dec. 22
2. Get labs for thyroid function & antibody markers
3. Doc will read labs & call
4. Re-check labs in 8 weeks
5. Will know at 4 month appointment if we need to do a biopsy

## What to include DURING or IMMEDIATELY FOLLOWING the appointment:

- Next appointment date/ time
- Forms, paperwork, or insurance tasks
- Prescriptions to fill
- Appointments to schedule
- Test results to follow up on
- Information to share with other family members or caregivers



# WHY THIS TOOL WORKS

## *Reduces Anxiety*

You walk in prepared, not scrambling.

## *Improves Communication*

Providers appreciate and respect organized caregivers.

## *Prevents Mistakes*

You catch errors and inconsistencies.

## *Creates a Personal Health Record*

When stored in a folder, it builds a timeline of visits, medications, and decisions you can reference anytime.

## *Empowers You*

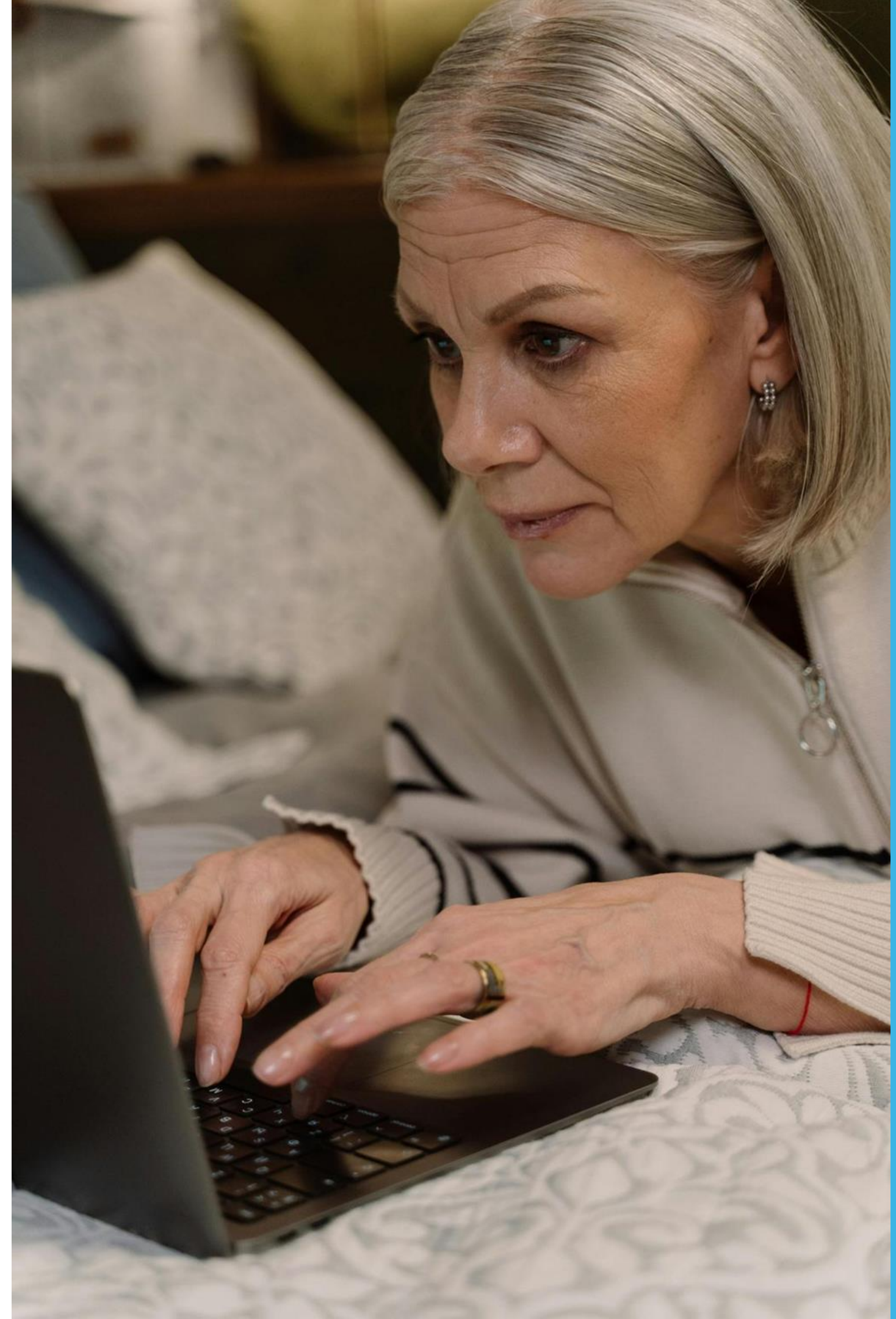
You become an effect advocate, not a powerless worry wart.

# WHEN TO SEEK ADDITIONAL SUPPORT

Consider professional care coordination when:

- managing multiple specialists & conditions
- navigating insurance denials or appeals
- coordinating transitions (hospital to home)
- feeling overwhelmed by medical decisions
- needing help with care planning
- wanting to access community resources but don't know how to find the right one

Resources like qualOT of life offer personalized





# KEY TAKEAWAYS

1. You have the RIGHT to advocate effectively for your loved one.
2. Come prepared, ask questions, take notes, follow up.
3. Use the Doctor's Visit Organizer to stay organized and confident.
4. Seek support when you need it - you don't have to do this alone.

# QUESTIONS?



# THANK YOU!



**Dr. Lyndi Hinkle, OTD, MOT, OTR/L**  
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