See the IDD Health Check full form for practice tips available at [ddprimarycare.surreyplace.ca](https://ddprimarycare.surreyplace.ca/)

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| **Steps** | **Details, practice tips and resources** | **Done?** |
| 1. **Initial encounter**
 | Ask for the patient’s current concerns (e.g., physical, mental health, social, financial) and address urgent issues. | ☐ |
| Explain the Health Check to the patient.  | ☐ |
| Together with the patient, identify someone who knows the patient well who will attend health care appointments, help to coordinate care, and monitor ongoing health and social needs. | ☐ |
| Introduce questionnaire(s) for patients/caregivers that will help communication for the subsequent visits: e.g., [About My Health](https://ddprimarycare.surreyplace.ca/tools-2/general-health/about-my-health/) and [My Health Care Visit](https://ddprimarycare.surreyplace.ca/tools-2/general-health/todays-visit/). Practice staff or caregivers at home may be able to help patients complete these forms. | ☐ |
| 1. **IDD-specific Cumulative Patient Profile (CPP)**
 | Update the CPP with information important to know for adults with IDD. See the notes attached to the full Health Check form for details of what to consider in these categories. Review information provided by patient or caregiver in [About My Health](https://ddprimarycare.surreyplace.ca/tools-2/general-health/about-my-health/), if available. **Key information:**  | ☐ |
| * abilities in communication and daily living
 | ☐ |
| * cause/associated condition for intellectual disability
 | ☐ |
| * community and social supports
 | ☐ |
| * accommodations needed in office to help encounters go well (ask advice from patient/caregiver)
 | ☐ |
| * health decision-making capacity and supports for decision-making
 | ☐ |
| * other health workers involved in care
 | ☐ |
| 1. **Chronic disease management**
 | Update the regular CPP/problem list.  | ☐ |
| 1. **Systems review / risk assessment**

At a minimum, review: | Assess risks that are common or important for adults with IDD. If available, review “Preparing for My Health Care Visit”, the first part of [My Health Care Visit](http://ddprimarycare.surreyplace.ca/wp-content/uploads/2019/08/5.2-My-Healthcare-Visit.pdf), and do a medical review of systems or functional enquiry. | ☐ |
| * usual daytime activities, physical activity, screen time, sleep
 | ☐ |
| * nutrition, vitamine D, calcium, diet excesses/aversions
 | ☐ |
| * mental health; environments, life events/trauma, and triggers for mental distress
 | ☐ |
| * substance use
 | ☐ |
| * sexual health, sexuality, intimacy and relationships
 | ☐ |
| * safety, including abuse, self-abuse, bullying and exploitation
 | ☐ |
| * caregiver stress
 | ☐ |
| * preparation for life stage transitions
 | ☐ |
| * immunizations
 | ☐ |
| * cancer screening
 | ☐ |
| * medication review; ;if possible, contact the patient’s pharmacist for a medication reconciliation
 | ☐ |
| 1. **Physical exam**

At a minimum, examine: | * vital signs
 | ☐ |
| * BMI/abdominal circumference
 | ☐ |
| * hearing/wax and vision screening
 | ☐ |
| * dentition
 | ☐ |
| * heart sounds
 | ☐ |
| * neuromuscular limitations and mobility
 | ☐ |
| * for cancer screening
 | ☐ |
| 1. **Assessment and plan**
 | * List the identified health issues and make a health action plan.
 | ☐ |
| * Identify who is responsible for the actions and a timeline for follow-up.
 | ☐ |
| * Copy the plan for the patient or complete the second and third parts of the [My Health Care Visit](https://ddprimarycare.surreyplace.ca/tools-2/general-health/todays-visit/) form (“During My Health Care Visit” and “After My Health Care Visit”) for the patient to keep.
 | ☐ |
| * For suggestions about what elements should be included in a plan and referrals, see the notes to the full Health Check form.
 | ☐ |