

COMMUNITY HEALTH WORKER PRE-APPOINTMENT PREPARATION CHECKLIST

PURPOSE:

PREPARE FOR INTAKE, EDUCATION, AND IBCCP APPLICATION SUPPORT

1. OUTREACH & INITIAL PREPARATION

Advertise the Breast Cancer (BC) Navigation Program offered at your Local Health Department (LHD)

Bring/prepare “What to bring to your appointment” info sheets

Schedule appointment with community member/patient to:

Review needs

Complete packet together

2. DOCUMENTS & FORMS TO HAVE READY

Whether it's at your desk, at an outreach table, or in a mobile field folder. Have these documents ready before your appointment:

New client form

Appointment checklist form

Blank Illinois Breast and Cervical Cancer Program (IBCCP) application

PDF version (for typing on the computer)

Printed version (for handwriting)

Blank Cornerstone consent form

Blank HIPAA consent form

Checklist of items required for IBCCP application
(ID, residency docs, insurance info, income proof, etc.)

3. DIGITAL TOOLS & QUICK ACCESS RESOURCES

Have key online systems, websites, and digital portals ready to access during your appointment.

Medicaid enrollment website bookmarked/favorited in browser

IBCCP website bookmarked/favorited in browser

Verify access to online application portals (if used)

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4. EQUIPMENT & SUPPLIES NEEDED FOR THE VISIT

Ensure essential equipment and materials are available—or confirm where the patient can access them. Have available OR know where the patient can access them (partner agencies, libraries, etc.):

- Scanner
- Printer
- Copier (if separate)
- Envelopes
- Fax machine or digital fax solution
- Post office or mail drop location
- Secure digital storage for scanned documents (per LHD policy)

5. REVIEW PATIENT HISTORY OR DOCUMENTATION ON FILE IF APPLICABLE

6. INTRODUCE SCREENING SERVICES

Explain the breast cancer navigation program offered at the local health department (LHD).

7. PROVIDE THE “WHAT TO BRING TO YOUR CHW VISIT” DOCUMENT