

## Appointment Checklist

### **Making the Most of Your Appointment(s): Tips and Strategies**

Keeping track of your own personal medical information is an important part of actively managing your health. These tips and strategies can help to manage your appointments with health care providers, keep track of important information that you are given, and ensure that you get the information you need for your own care.

The following checklists can be used as a guide to help you reflect on your wants and needs for appointments with health care providers (they might not all be relevant all of the time).

#### **How to make the most of my time with the health care provider:**

- If possible, keep your health card, records (vaccination records, important documents, medication information sheets, etc.) and have them on hand at your appointment or easily accessible to send after your appointment, if required.
- Write down questions that come up between appointments (in a place you will remember writing them). It is easy to forget what you meant to bring up once sitting with the health care provider.
- Keep track of scheduled appointments with a card in your wallet, on your phone, in an online calendar, in a day planner, etc.

#### **What is useful to share during my first visit?**

- Current health issues and whether you are being treated for them.
- Any allergies to medication or foods (some vaccines or medication can contain traces of allergens).
- Medications you are currently on (including contraception).
- Whether you have ever been hospitalized or had surgery (for what and when).
- Any family members who have/had major health issues.
- Tobacco, alcohol, and/or drug use.
- Any personal circumstances or preferences that are important to share.

#### **What should I prepare and bring to my appointment?**

- A pen and notepad or a piece of paper and/or your phone to write down important information.
- If you have one, your day planner/agenda and/or phone to mark down follow-up appointments.
- A list of questions you have prepared in advance. Remember that it is okay to keep asking questions until you fully understand. It is okay to ask for simpler answers in clearer language.

- A list of your expectations for the appointment and ways to communicate them.
- If it would make you feel safer, more comfortable, or more in control, you can bring a family member, friend, or other support person with you during your appointment. They can help take notes, ask questions to clarify information, and help you remember what your health care provider says.
- If applicable, bring a list of medication/supplements/herbal remedies/hormones you are using and your allergies (if you have any). In some cases, a health care provider can help you figure out how your medication or supplements interact with each other.

**What information should I ask for or keep track of during my appointment?**

During your appointment, you may feel rushed, overwhelmed, intimidated, or forgetful. Here is a list of things to think about, write down in advance, and/or have answered during the appointment to help you take an active role in your health care decisions and make the most of your limited appointment time.

**Questions to ask yourself before the appointment:**

- What questions or concerns do I want addressed during the appointment?
- Do I have any symptoms? If so, how long have I had them? Have I done anything to make them better? Has it worked?
- Can I think of any recent changes in my life or my routine?

**Questions to ask your provider during the appointment:**

- What is the diagnosis and next steps?
- I don't quite understand. Can you explain what the diagnosis means?
- Do I need to take medication? What is the name of the medication?
- What should I know about how to take the medication safely and effectively?
- What should I watch out for when taking the medication?
- What are the details I need to know about how to proceed for the treatment, follow-up, surgery, etc.?
- What are the risks and benefits of this medication, treatment, surgery, etc.?
- How soon will I start seeing results from the medication, treatment, surgery, etc.?
- What will my surgery recovery time look like?
- Are there alternatives to this medication, treatment, surgery, etc.?

- Do I need follow-up tests? What are they? Where can I get them done?
- Am I being referred somewhere else? Why?

**Questions to ask your provider when you are getting ready to leave:**

- Could you tell me what I need to do after I leave this appointment?
- What can I do at home to care for myself?
- Do you have any recommendations for pamphlets, websites, groups, or any sources of information and/or support about this diagnosis, test, medication, etc.?
- Did I get this right [list what you are asked to do to care for yourself]?
- I am not sure I understand this. Could you clarify? Could you write these instructions down for me?

**Questions to ask your provider if you have concerns about following up on a recommended treatment or test:**

- Do you have more information I could read up on?
- How soon do I need to make a decision about getting a test or starting a treatment?
- What might happen if I delay or avoid treatment?
- What symptoms should I watch out for?
- Can you recommend any types of support to help follow through with this treatment?
- When should I call to report any symptoms?

**Questions to ask yourself before a follow-up appointment:**

- Do I have any new symptoms or symptoms that persisted? What are they?
- What concerns do I want to address during my follow-up appointment?
- Have I had any trouble following up on treatment or taking my medication?

**Questions to ask your provider during a follow-up appointment:**

- What is your assessment of my condition and the treatment?
- Are there any other tests or treatments I need to take? What are they?
- What symptoms should I be on the lookout for? When should I call to report them?