

Medical Appointments



Making Appointments

If scheduling calls are difficult for you, you are not the only one.

Keep track of all your providers in one place. **Try our template on Page 9 to help**

Before you call



Know what you need from the call

- Which doctor or provider do you want to see?
- What location you normally go to?
- What reason are you making this appointment?
- If there are options: do you want the appointment in-person or virtual?



Prepare information they might need

- When you are available for the appointment
- Insurance (group + member ID)
- Your phone number

During the Call

Be ready to take notes before you call

If you struggle to word things, you can use a script.

We have examples on page 4.

Be prepared to wait

- Silence is normal, but be prepared for odd music or recorded messages
- You can switch to speakerphone in a safe place, or use earbuds
- It's okay to do another quiet activity while waiting.

Refer to your notes when answering questions

Make sure you ask your own questions

(e.g., Do I need to fast? What do I need to bring?)

Confirm you understand next steps before ending the call

After the Call

Write down appointment details

Write down instructions

Before your Appointment

Bringing Support



Consider if you want to take someone into the appointment with you for support

They can:

- Help you to communicate, back you up, and support you
- Help if you become overloaded
- Help you process the information later.



Healthcare advocates may be available and can offer help

Example: valleyhealth.com/services/joey-friends-disability-navigation-support



Contacting Your Provider Ahead of Time



If you can, try to send your questions ahead of time online or by email so you feel less pressure during the appointment.

Prepare What You Want to Discuss



What is the main goal of this visit? Are there other things you'd like to address today?

Symptoms and/or concerns:

- Make a list of questions or symptoms beforehand to use during the appointment
You can use our template on page 5.
- Consider writing these down in everyday life or when you think of them, so it is easier to remember when preparing for your appointment later.
Health tracker apps can help with this.

What questions do you want to make sure you ask?

You can write down exactly how you want to say things.

We have examples on page 4.

Practical Planning



Make a transportation plan

Prepare information they may need. **Medical summary cheat sheet on page 6.**

- ID and insurance cards
- Medication list (prescription, over-the-counter, and supplements)
- Medical history



Remember to bring sensory items, like ear plugs or ear buds

During Appointment

Before your appointment begins



You may be asked for your ID and insurance cards

You may be asked to fill out forms before your appointment.

See our medical overview cheat sheet on page 6.



Be prepared to wait:

- Bring something to pass the time in waiting room
- If needed, use sensory items (like ear buds or plugs)

When you see the doctor or medical professional

Bring your prepared notes to the appointment. **See our template form on page 7.**



If you came in with multiple goals: which one is the most important to address?

It's okay to ask questions, you should understand:

- Risks and benefits
- Treatment goals
- Details about any procedures

Ask how to contact them to ask questions that come up after the appointment.



It's okay to take notes during your appointment.

See if your doctor offers handouts with information about what was discussed during the appointment

Ask if there are follow-up steps (e.g., scheduling an appointment, getting a new medication)

Write down next steps before leaving



If needed, make a reminder to schedule the next appointment, or schedule it before leaving the office

After your appointment

Write down your notes for next time right after your appointment.

Review the outcome and your understanding with a trusted person.



Script Suggestions

Scheduling

Getting Started:

- Hi, my name is [Name], and I am calling to [schedule/reschedule/cancel] an appointment with [doctor name]

If You Don't Understand / Need Time:

- *Can you repeat that more slowly?*
- *I need a moment to write that down.*
- *Can you spell that?*

If They Ask Something Unexpected:

- *I'm not sure. Can you explain what you need?*

Finishing the call:

- *Can you confirm the date and time?*
- *Is there anything I need to bring?*
- *Is there anything I need to do before the appointment?*

During your Appointment

Setting priorities:

- *"I want to make sure I cover this during the appointment."*

If things go off track:

- *"Can we go back to my main concern?"*

Asking for more information:

- **"Can you explain that more simply?"**
- **"Can you write that down?"**

If overwhelmed:

- *"I need a moment."*

Follow-up questions:

- *"What do I need to do after this appointment?"*
- *"Do I need to change medications?"*
- *"How often should I come back?"*

Making an Appointment

Provider Information

Provider Name:

Office Name:

Phone #:

Address:

My Information

DOB:

Phone #:

Address:

Insurance

Insurance Company:

Insurance Owner:

Member ID:

Group ID:

Reason for Visit:

My availability

- Morning
- Afternoon
- Evening

About this Call

Who did I talk to?

What did they tell me to do next?

Phone numbers they gave me:

Phone Tree Notes (press 1 → 4 , etc.)

Appointment Information

Date:

Time:

Location:

Doctor:

Instructions:

Primary Care Provider

Provider Name:

Office Name:

Phone #:

Other Providers that might be relevant

Provider Name:

Specialty:

Phone #:

Provider Name:

Specialty:

Phone #:

Medications

Name	Dose	Times per day	Why I take this

Relevant history

Diagnoses:

Surgeries:

Allergies:

Family history (optional):

My Information

DOB:

Phone #:

Address:

Insurance

Insurance Company:

Insurance Owner:

Member ID:

Group ID:

Pharmacy

Name:

Phone #:

Address:

My contact person

Name:

Relationship:

Phone #:

Today's Priority

Other Concerns

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Symptom Breakdown

Symptoms:

Severity (0-10):

When it started:

How often:

Notes

What makes it worse? What makes it better? What does it affect (sleep/work)?

Questions

What You've Already Tried

Medications:

Lifestyle:

Tests:

Results:

Specific Asks

- Test
- Referral:
- Med change:
- Documentation (note, form, etc.):

Important Context

Diagnoses? Family History? Recent Changes?

Before you leave:

- I stated my main issue clearly
- I covered all my concerns
- I asked for what I need
- I got next steps

Notes:

What did the doctor say?

Blank area for notes regarding the doctor's instructions.

Diagnosis / impression:

Blank area for notes regarding the diagnosis or impression.

What do I need to do next?

Blank area for notes regarding the next steps.

Tests ordered:

Blank area for notes regarding tests ordered.

Medication changes:

Blank area for notes regarding medication changes.

When do I follow up?

Blank area for notes regarding follow-up timing.

Questions I still have

Blank area for notes regarding questions still remaining.

Provider Name: Phone #:

Type of Provider: Phone Tree Info:

Office/Clinic Name:

Address: Portal or Email Contact?:

Portal or Email Schedule?:

On-call nurse for emergencies?:

Why did I see them?

Notes

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