

Preparing for an Appointment

Before the Visit

- Prepare an "Essentials" notebook/binder for yourself or your family member.
- Determine which documents will be most important for this visit and flag them or move to the front of the notebook.
- Prepare a list of specific questions you have or topics you would like to discuss.
- Bring a notepad to take notes during the appointment.
- Consider asking a friend, family member or another advocate to accompany you to the visit to help take notes and provide a second set of eyes and ears.
- Prepare to be on time for the appointment. This reduces stress on you, your family member and the office.

During the Visit

- Make a personal connection with the professional so they see you and your family member as a whole person, not just as a patient or client.
- Take your time and go over your prepared list of questions.
- Remember, you are the expert on yourself and/or your family member - you are the best advocate. It takes strong teamwork between you and the professionals to truly be successful.
- Ask the professional to repeat anything that you did not get the first time.
- Take notes and ask for (and write down) the next step of action.
- Ask for the professional's written visit notes/plans.
- Ask about the best method of contact between visits.

After the Visit

- If you have further questions, follow up using phone call or email.
- Repeat request for visit notes if you do not receive them within 1 week.
- Keep a note sheet in your binder to jot notes on questions for future visits.
- Maintain your notebook/binder with up to date information.

Use this form to prepare for your next appointment:

Office/Clinic: _____ Address: _____

Appointment Date/Time: _____ Medication List Notepad Resource Binder

Reason/s for Visit: (in order of priority)

Topics I Want to Discuss Today:

Specific Questions I/We Have:

Action Plan:
