

Making an Appointment Worksheet

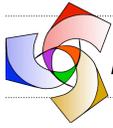
This worksheet walks through the steps of making a healthcare appointment. It has lines to write in information that you might want handy while making the appointment. It also has lines to write in information the office staff might tell you, like the day and time of the appointment. The parts in *italic* can be used as a script to be used in conversation, if desired. Some things on this worksheet may not apply to you. That's OK; just ignore those parts.

1. Making an appointment is usually done by telephone, in person, or, if available, through a secure electronic messaging system (example: MyChart). You may also have arranged a special way of contacting the office previously. Start by contacting the office.

The contact information for the provider's office is (use the option that applies to you):

- Telephone _____
- Web address and login information for secure messaging system

- Other contact information _____
- The provider's name is: _____



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Hello, my name is _____ and I'm calling to make an appointment with _____.

2. When you contact the provider's office, tell them what the appointment is for. You may need to give details to a nurse, medical assistant or scheduler—they are an important part of a team and will keep your information confidential.

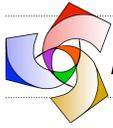
NOTE: If you are making your first appointment with a new provider, tell them you want to make a **new patient appointment**. See section below for additional information you may need.

The reason that I am making the appointment is:

3. Have your (or your supporters') contact information available in case the office needs to call you back. The office may not ask for this information, but it's good to have just in case.

If the office needs to contact me back, they should contact:

- Name _____
- Telephone _____
- Other _____



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4. Know your own schedule / availability; if applicable, know the availability of the person who will support you and make sure your schedules work together.

The days and times I am free for an appointment are:

5. Then there will probably be a conversation next about scheduling. By the end of the conversation, you should be able to confirm the date and time of the appointment, and have an estimate of about how long the appointment is likely to take.

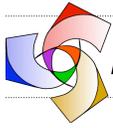
The date and time of my appointment is _____.

The appointment will take about _____ (hours or minutes). Is that correct?

6. Make sure you know the location of the appointment.

The location of my appointment is:

- Street Address: _____
- Building: _____
- Floor, suite number, or room number: _____
- City or Town: _____



Is that correct?

7. Make sure you know the name of the provider you will be seeing.

Just to confirm, the name of the provider I'll be seeing is

_____. *Is that correct?*

8. Make sure you know about anything special you need to bring or do.

Examples: 1) If the provider wants to do a cholesterol test at your appointment, you might need to fast before the appointment. 2) If it's a new patient visit, the provider might want you to bring any medical records you have.

Is there anything special I should do to prepare for this visit, or anything special I should bring with me to this visit?

if you are making a first appointment with a new healthcare provider

The office staff may ask you for additional information. It may be useful to have this information handy in case they do.



9. Who and to what number the reminder call should be directed:

- Name _____
- Telephone Number: _____
- Other (alternative to telephone) _____

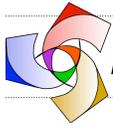
10. If you have health insurance, who your insurance provider is:

11. Mailing address for sending forms or other papers through the mail:

- Number and Street: _____
- City or Town: _____
- Zip Code: _____

You may also have some additional questions for the office staff, or things you want to learn about the clinic or provider.

12. If you have any questions about the new provider that haven't been answered, ask them now. Examples: Is the provider taking new patients? Do you accept my insurance? Are you open evening hours? See **Tips for Finding a Provider** for more examples.



13. If desired, ask if the office can send you the new patient forms to fill out in advance.

Could you please mail me the new patient forms so I can fill them out in advance?

14. Consider discussing accommodation needs related to facilities, if you have them. For example, exploring waiting room options, accommodating sensory needs, or finding out if it's OK to visit the office before the appointment or to take pictures of the office before the appointment.

I have a disability that can make it hard to manage the office. I'm wondering if it would be possible to:
