

Helping Patients and Families Prepare for an Appointment

A Guide for Clinicians

How can you help patients and families prepare for appointments?

We are using two new tools to help patients and their families prepare for their appointments.

Patient Prep Cards are sent to patients to fill out before their appointment to help them think about what they want to talk about and what their goals for the visit are. If they don't fill out the card before they arrive, they can still fill out the card in the waiting room or even while they wait in the exam room.



The Patient Prep Card is titled "Be Prepared" and includes the instruction "Fill in this card and bring it to your visit." It has three main sections: "Today I want to talk about..." with a numbered list (1, 2, 3) and lines for writing; "My questions are..." with lines for writing; and "My health goals are..." with lines for writing.

Patient Note Sheets are kept in the exam rooms. The Note Sheets give patients a place to write things down during their appointment to help them remember important information after they leave.



The Patient Note Sheet is titled "Write it down - Join your team!" and is divided into four quadrants for notes: "What did the doctor tell me?", "What medicines do I need to take? How do I take my medicine?", "What tests do I need? What are my test results?", and "What do I need to do next?". It includes icons for a stethoscope, pills, a clipboard, and a person.

How do you use the new tools?

- Review the Patient Prep Card to ensure that you understand the patient's concerns and goals.
- Address the issues on the Patient Prep Card.
- Offer the Patient Note Sheet and a pen to patients or family members and tell them that you encourage them to write things down if they want.

Why is this important?

These tools help patients and their families:

- Prepare to be engaged in their health care appointment.
- Prioritize the concerns they want to talk about.
- Communicate their health goals.