**Appointment Summary Form**

**Purpose:**

Many times, a lot of important information is shared during an appointment—new diagnoses, changes to medications, follow-appointments, etc. It can be a lot to understand and remember, which can understandably cause a lot of anxiety. The purpose of this form is to provide a written summary of the important information from your appointment as well as provide you with concrete steps to follow after the appointment. You can refer back to this form after the appointment to help you remember exactly what was discussed and exactly what you need to do next.

Please note: this form provides a great starting point, but, if desired, please adapt it to meet your specific needs.

**Directions:**

1. Print out several blank versions of the Appointment Summary Form and keep the copies in your Healthcare Notebook. Keep these forms in your Healthcare Notebook to
2. Try to fill it out while you are with your provider. However, if the provider is unable to assist, ask them to find someone who can assist you with completing this form.
3. Note that there are additional forms to fill out if your doctor gives you a referral to another provider, orders tests, and/or prescribes medicine.
4. Print the card. You will notice that the card has 2 sides:

Side 1: The front side provides a short list of reminders to do approximately 3 days before the appointment. If you scheduled an appointment and it is closer than 3 days, that is okay. You can still use the front side to help you prepare 1-2 days before the appointment.

Side 2: The back side provides a short list of what to do on the day of the appointment. Preparing for the appointment by gathering the items you need ahead of time and then taking some time to regulate right before leaving can be very helpful in managing anxiety.

Hang the front side on your visual schedule 1-3 days before the appointment. Read through the short list and complete the items listed This is …

Print out several copies of these forms in a tab in your folder so you have them ready for when you need them.

**Appointment Summary**

On \_\_\_\_\_\_at \_\_\_\_\_\_\_I had an appointment with\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_a\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Time (Name and Type of Provider)

**Did my provider…**

1. Answer all of my questions (If yes, what are the answers. If no, ask before you leave)

2. Give me a new diagnosis:

3. Order labs or X-rays for me to complete (if yes fill out other form):

4. Make changes in my medications (if yes fill out other form):

5. Want me to make appointments with a specialist (if yes fill out other form):

6. Give me any referrals to other services (if fill out other form):

**Next Steps**

When is my next appointment?

Is there anything I need to bring to my next appointment?

Who do I need to tell about the results of this visit?

Reason I may need to contact this Doctor before my next appointment:

Other:

**Referred to Another Provider/Specialist or to Other Services**

If you were referred to another provider, clinic, or service have your provider go over this information with you before you the office.

**About the person, clinic, or service**

What is the name and number of the person, clinic, or service I am to see?

What kind of provider, clinic, or service am I being referred to?

Why have I been referred to this other provider, clinic, or service?

How quickly do I need to be seen by this other provider?

**What I need to do**

Do I call them or do they call me to make an appointment?

If I call them, what do I need to say?

What should I do if they cannot see me in time?

Is there anything I need to bring with me when I see this other provider?

**Getting A Lab, X-Ray, Or Other Test**

If labs, X-rays, or other tests are ordered have your provider go over this information with you before you leave the office.

**About the labs, X-ray, test or procedure**

What is the name of the test or procedure?

Why am I having this test or procedure?

How soon do I need this test or procedure done?

Where do I go to have the test or procedure done?

Do I just show up for the test or procedure, or do I have to schedule an appointment?

When and how will I learn the results of the test?

Are there special instructions for the test?

**Scheduling**

Who do I schedule the appointment with, and how do I do it?

When scheduling are there any accommodations I need to ask for? If so, what?

**Things to keep in mind while scheduling & during the lab, x-ray, test, or procedure**

Do I need to do the test or procedure at a special time or day, if so when?

Do I need to bring someone else with me to the test or procedure?

What will the test or procedure be like? Example: will there be strange sounds or sensations?

**Taking A Medication**

If new medication was prescribed have your provider go over this information with you before you leave your appointment

**About the medication**

What is the name of the medication?

Has the prescription already been sent to the pharmacy or do I need a paper copy?

If it was already sent to the pharmacy which one?

**Things to be aware of**

Are there interactions with sunlight, medication, or foods?

What side effects should I look out for?

What do I do if there are side effects?

Should I avoid any particular activities?

Do I need to store the medication in a special way?

**Taking the medication**

How many pills or how much liquid do I take at a time?

How many times a day or week do I take it?

What time or times of day should I take it?

Do I take it before or after eating?

Do I take it just when I have a symptom or on a schedule?