

Forms and Worksheets

- **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.
- **What to Bring to a Healthcare Visit Checklist** - This is a checklist you can use when putting together the things you need to bring to a healthcare visit. It has second page with extra things to bring to a first visit, or if you haven't seen your healthcare provider in a long time.
- **Symptoms Worksheet** - This worksheet covers the information healthcare providers usually want to know about symptoms. Not all questions apply to all symptoms. But thinking through some of these questions may help you better describe your symptoms or answer your provider's questions.
- **After the Visit Worksheet** - Your provider may ask you to do something after the appointment. This worksheet has a page for each of the main things your provider may ask you to do:
 - Make a follow-up appointment with your healthcare provider
 - See a specialist or make an appointment with a different healthcare provider
 - Get a lab, x-ray, or other test
 - Take a medication
 - Do something to manage your health condition at home



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: _____



AASPIRE MAKING AN APPOINTMENT

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 _____



AASPIRE MAKING AN APPOINTMENT

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:



Things to Bring to a Healthcare Visit

- Health insurance card (if you have one)
- Something fun to do in case you have to wait (examples: book, puzzle, fidgets, music player)
- Sensory items (examples: sunglasses, chewing gum, headphones)
- A list of questions or things you want to talk about with your healthcare provider
- If you plan to talk about a symptom or set of symptoms, a completed Symptom Worksheet (if you used it)
- Any logs or diaries you keep related to your health problems (examples: blood sugar measurements, blood pressure measurements, symptom trackers)
- Containers (bottles, tubes, etc.) of all of your current medications. The next best thing would be a list of all current medications, including any new or changed medications
- If you have been to the emergency room, have been hospitalized, or have seen a different healthcare provider since your last visit, any instructions or paperwork that you got
- Name, address, and any directions needed to get to the office.

Anything your healthcare provider has asked you to bring (if they have asked you to bring anything)



AASPIRE WHAT TO BRING TO A VISIT

If this is a visit with a new provider, if you have not seen this provider in a long time (for example, at least two years), or if any of this information has changed since the last time you saw this provider, also bring:

- A short summary of your medical history
- Your old medical records (if you have them)
- Names and addresses (or fax numbers) of your past healthcare providers or any other healthcare providers that you are still going to (your primary care provider and any specialists)
- Names and contact information of people who may be involved in your healthcare. Examples include the person they should contact in case of an emergency, your Healthcare Power of Attorney (the person who would make health-related decisions for you if you ever could not make them yourself), a guardian (if you have one), and anyone who helps you communicate between visits.
- Your intake form, if you filled one out at home.

If this is a first visit, or if you would like to talk with your healthcare provider about your accommodation needs or strategies that may help make visits go more smoothly, also bring:

- Copy of your Autism Healthcare Accommodations letter for your healthcare provider (if you made one)

Describing Your Symptoms

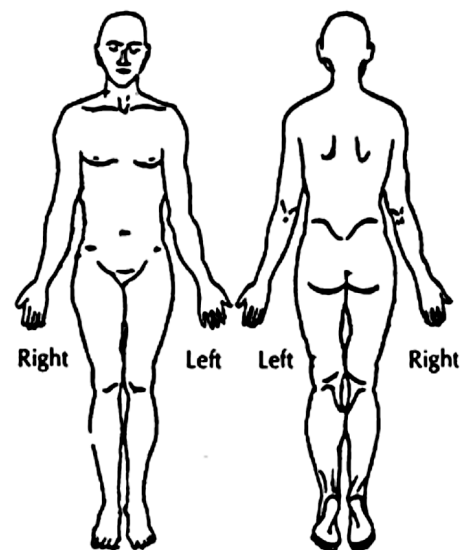
This worksheet covers the information healthcare providers (like physicians, physician assistants, and nurse practitioners) usually want to know about symptoms. Not all questions apply to all symptoms. **You do NOT have to answer every question.** But thinking through some of these questions may help you better describe your symptoms or answer your provider's questions.

Use this worksheet for your own reference. Healthcare providers may become overwhelmed if you ask them to read it. For more information and examples see [reference and link to toolkit]

What Is the Symptom (or set of symptoms)? Describe them:

Location – What areas of your body are affected?

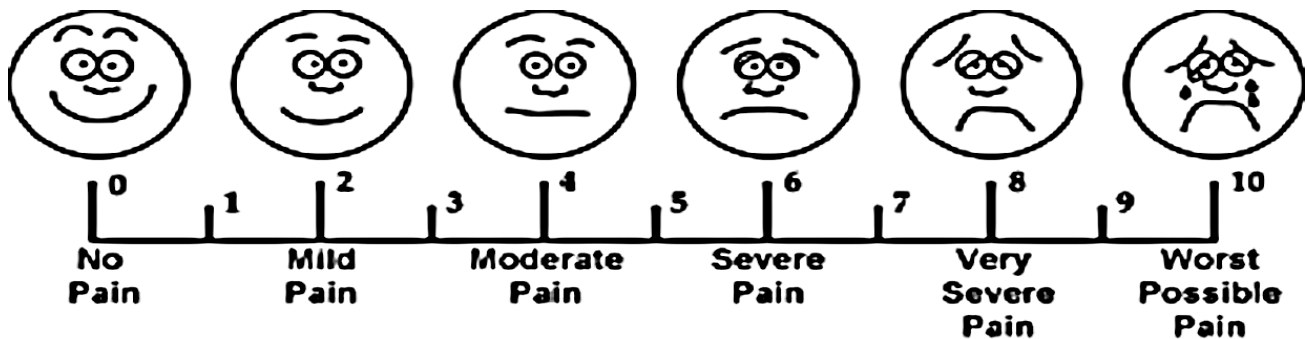
Optional: Put an X or shade in the areas of your body where the symptoms are.



Quality - If the symptom is pain, what is the pain like?

Severity - How bad is it? Does it bother you a little bit or a lot?

Optional: You may want to use a pain scale to describe how bad your pain is. Some people like these scales; others don't. If you are having pain, your provider may ask you to use a pain scale, so it may help to think about it in advance.



Duration – How long has it been going on? When did you first notice the symptom?



SYMPTOMS WORKSHEET

Onset - What were you doing when the symptom first started?

Frequency and Patterns – Does the symptom come and go or is it there all the time? Can you predict anything about it?

Change from Baseline - What is normal for you? How is this problem different from how you usually feel?

What Makes it Worse/Better - What makes the symptoms feel better? What makes them worse?



Related Symptoms – Do you get other symptoms at the same time?

Other People – Do other people around you, like family and friends, have the same symptoms?

Effect On Lifestyle or Activities - How have the symptoms affected your life? Do they keep you from doing things that you normally do?

Treatments – What have you tried doing to treat your symptoms so far? Has it helped? What happened when you tried the treatment?



Why now? If this problem has been going on for a long time, what made you come in to see your healthcare provider now? Has anything changed recently?

Your thoughts – What do you think is causing the problem? Are you worried about something in particular?

Other important details – Is there anything else that you think may help your provider understand what is going on?

Things to Know Before You Go Worksheet

Your provider may ask you to do something after the appointment. This worksheet has a page for each of the main things your provider may ask you to do.

Your provider may only ask you to do one or a few of these things, or your provider will not ask you to do any of these things at all. Just use the parts of this worksheet that apply to your situation and ignore the rest. You do not need to fill out every line on every page.

Getting Help After the Visit

Who do I contact if I have questions after I leave the office? _____

How should I contact them? _____

If you have a hard time using the healthcare system or advocating for yourself, tell your healthcare provider. Your healthcare provider or their staff might be able to help you. Examples of things they might be able to help you with are: arranging transportation, using the pharmacy, getting the accommodations you need in order to work with a specialist or have a lab test done, and filling out forms.



AFTER THE VISIT

Making A Follow-Up Appointment With Your Healthcare Provider

If you were told to make a follow-up appointment with your healthcare provider, make sure you know this information before you leave the office.

When should I follow up? _____

How do I make a follow-up appointment?

Is there anything special I should do before the follow-up appointment or bring to the follow-up appointment? _____

Making An Appointment With Another Healthcare Provider or Specialist (Referral)

If you were referred to another provider, clinic, or department, make sure you know this information before you leave the office.

What is the name of the person, clinic, or department I'm supposed to see? _____

Do I call them or do they call me? _____

Who do I contact to make the referral? If so, how? _____

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

When should I expect to hear back from this other provider? _____

What should I do if I don't hear back from this other provider, or if they cannot see me in time? _____

Why have I been referred to this other provider? _____

Should I bring anything special with me when I see this other provider? _____

Tip: Make sure the provider you have been referred to knows about any accommodation needs that you have.

Getting A Lab, X-Ray, Or Other Test

If your healthcare provider has ordered labs, X-rays, or other tests, make sure you know this information before you leave the office.

What is the name of the test or procedure? _____

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

Do I need to do the test or procedure at a special time or day? When? _____

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

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

Are there special instructions? Example: Fast for 12 hours before the test. _____

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

How will I learn the results of the test? _____

Tip: Make sure the people who will be doing the labs or tests know about any accommodation needs.

Tip: Ask your healthcare provider for help preparing for labs or tests.

Taking A Medication

If the provider prescribed medication, make sure you know this information before you leave the office.

What is the name of the medication? _____

Has the prescription been sent in to the pharmacy, or do I need a paper copy of the prescription? _____

Where is the pharmacy? _____

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? _____

When do I stop taking it? _____

How do I get refills, if I need them? _____

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? _____

