

PREPARING TO MEET YOUR New Health Care Provider

This checklist is an essential first step toward taking charge of your health journey, creating meaningful connections, and achieving outcomes that matter to you. The better prepared you are for your first appointment with your new doctor, the better they will be able to help you.

 Confirm your appointment details

One week prior, call the clinic to verify the date, time, provider/department and location of your appointment.

 Gather and bring important documents

Bring your ID, insurance information, payment method, and referral if needed. Bring past test results and handover notes from other clinicians. You can also bring useful information such as a symptom diary, recordings or data from your wearable device.

 Medical history and medications

Be prepared to describe past and current medical diagnoses and treatments, past surgeries, and medications you are currently taking. Discussing family history is also important.

 List your goals and questions

Tell your doctor about your specific goals for the visit. What are your questions and concerns, and what do you need answered during the first visit? Ask for practical and actionable advice.

 Plan transportation and support

Make sure you plan enough time to allow for travel, parking, and finding your doctor's office without stress. Consider bringing someone with you for support.

 Other essentials

It can be helpful to bring a notebook or phone for writing down questions and information during the visit. Bringing drinks, snacks, and reading materials can help you feel more comfortable during waiting times or delays.