

Healthcare Conversation Preparation Tool

This tool is designed to help you prepare for healthcare appointments by clarifying your concerns, questions, and priorities in advance. Completing it can make your conversations with providers more effective and meaningful. Bring this with you to your appointment to help guide the discussion.

1. Purpose of Visit. Clearly state why you are seeking care today. This helps focus the appointment on your most important needs.

- ~ What is the main reason for this appointment?
- ~ What symptoms or concerns do I need to discuss?
- ~ When did the symptoms begin? Are they getting better, worse, or staying the same?
- ~ How are these issues affecting my daily life?

2. My Questions. Write down questions in advance so you don't forget during the appointment. Prioritize the most important ones.

- ~ What do I most want to know?
- ~ Are there tests, treatments, or diagnoses I don't understand?
- ~ What are the possible benefits and risks of treatment options?
- ~ Are there alternatives (including lifestyle approaches) I should consider?
- ~ What will happen if I choose not to pursue treatment right now?

3. My Goals and Preferences. Consider what matters most to you—not just medically, but in terms of your values and daily life.

- ~ What outcomes am I hoping for?
- ~ What activities or abilities are most important for me to maintain?
- ~ Are there treatments or procedures I want to avoid?
- ~ How do my cultural, spiritual, or personal values shape my healthcare choices?

4. Support and Advocacy. Having someone with you can help ensure your questions are answered and reduce stress.

- ~ Who can I bring with me to help listen and take notes?
- ~ Who can advocate for me if I am unable to?
- ~ Have I shared my healthcare wishes with a trusted person?
- ~ Do I have a healthcare proxy, advance directive, or power of attorney?

5. Next Steps. At the end of the visit, clarify what you need to do and how you will receive results or follow-up information.

- ~ What are the agreed-upon next steps for my care?
- ~ Do I need to schedule additional appointments or tests?
- ~ When and how will I receive test results?
- ~ Who can I contact if I have questions or new concerns?
- ~ How can I keep track of medications, instructions, or referrals?

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6. **Reflection After Appointment.** Take a few minutes after your visit to review and reflect. This helps you stay on track with your care plan.

- ~ Did I get the answers I needed?
- ~ Do I feel clear about my diagnosis or next steps?
- ~ Do I need additional support (emotional, financial, or social) to follow through?
- ~ What will I do before the next appointment to prepare?

