Checklist to Prepare Patients for New Appointments

Once the team knows a patient has a new health care appointment, the checklist can be used to prompt team members to reinforce key steps that promote patient engagement and preparation. This checklist includes references to the Appointment Aide, a tool the patient and their care partner can use to document questions and health information in preparation for a new appointment. For additional background, evidence, and resources to support patient engagement in a transition to a new ambulatory care setting, see The Guide for Safe Transitions to New Appointments.

- [ ] **Recognize the patient and care partner (family or friend) as full members of the health care team by:**
  - Including the patient and care partner in key decisionmaking and care planning, according to their preferences.
  - Eliciting and honoring the patient's and care partner's goals and priorities.
  - Asking open-ended questions in order to not limit the patient's or care partner's concerns.
  - Using plain language, motivational interviewing, and teach-back to ensure understanding and confidence.
  - Providing information that builds on the patient's knowledge and skills.
  - Using follow-up phone calls to discover if the patient has any additional questions.
- [ ] **Review the after-visit summary (AVS) with the patient and their care partner.**
  - Include a list of any problems to watch for and how to respond to each problem.
  - Assess any gaps or opportunities for improvement in the current AVS that could affect patient engagement and preparation.
- [ ] **Review a reconciled medication list with the patient and their care partner.** Provide an easy-to-read, printed medication list for the patient to take home and carry to a new appointment.
- [ ] **Encourage the patient to prepare for their new appointment by:**
  - Thinking about, writing down, and stating any questions, concerns, or preferences. This includes asking the patient to describe their concerns. Patients may not share their most important concerns first. Continue asking, "Are you concerned about anything else?" until the answer is "no."
  - Carrying a list of current medications to the new appointment.
  - Including a care partner in the new appointment. The patient should be encouraged to discuss how the care partner can support their needs.
  - Reviewing the activities of daily living the patient may need help with and whether there is someone to provide this help.

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- **Review scheduled or pending appointments with the patient by:**
  - Confirming the date, time, and reason for the referral or appointment, and the name and location of the clinician.
  - Inquiring as to whether or not the patient has a plan to get to the new appointments.
  - Asking the patient if they need help making follow-up appointments, and providing support as needed. Let the patient know if your practice will conduct a follow-up call after the new appointment and verify the best contact number(s) to call.

- **Help the patient identify key members of their health care team.** Reiterate the patient's role as a member of his or her own health care team. Ensure the patient and their care partner know how to contact other members of their health care team and how to access their health care information (e.g., online patient information).

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