Patients, Caregivers, and Advocates: Preparing for a Doctor’s Visit  
A Reference Guide  
(Checklist Attached)

We all need to visit a doctor from time to time—some of us more than others. To make the best use of your doctor’s time (and your own), you can start by being an advocate (supporter) for yourself. Being an advocate allows you to take charge of your healthcare and partner with your provider. You may also wish to find a person or a loved one who can advocate on your behalf and act as a link between you and your doctor.

The best way for you to get started as your own advocate is to be prepared. This reference guide is to help you prepare for a doctor or hospital visit.

A patient’s mother had numerous tests done to find out why she was having severe stomach pains, but there were never any answers. Nine months from the beginning of her doctor visits, an x-ray report was uploaded into the electronic health record (EHR) that diagnosed the patient’s mother with pancreatic cancer. She was now, nine months later, in an advanced stage of pancreatic cancer. How could you prevent this from happening to you or a loved one?

To stay abreast of your and your loved ones’ healthcare, you should engage1 in these five areas:

- **Empower**—understand the importance and the responsibilities of being your own patient advocate or serving as an advocate for a loved one.
- **Inform**—understand and know your rights to access your health record.
- **Involve**—prepare for your doctor or hospital visit by considering the enclosed checklist.
- **Consult**—write down questions to ask your doctor or insurance company prior to the visit.
- **Collaborate**—Understand your financial responsibilities.

“Informed [and] smart patients are able to open up the conversation. This alone will nurture your relationship with your doctor and create a more dynamic and satisfying experience with the medical system. The responsibility of your health should be shared between you and your doctor. As you work to strengthen your connection, your physician will always do their best to meet you halfway.”  
Sharecare co-creator Dr. Oz, Vice-Chair and Professor of Surgery at Columbia University

**Empower**
Participating in your care is key to improving your overall health. Your goal should be to know as much as you can as a patient. Your visit starts before you actually step into the doctor’s office.

Start by setting a personal goal for what you would like to get out of your visit. Is it to solve a health issue? Is it to maintain a healthy lifestyle? Is it to follow up on an ongoing condition? This will help you participate in your healthcare decisions.

**What is a “patient advocate?”**
Even the best-informed patient can find the healthcare system to be overwhelming. That is why some patients turn to a patient advocate for help in meeting their healthcare goals. A patient advocate is a person or agency/company that acts on the his or her behalf to make appointments, help with billing questions, get pre-approval of tests or surgeries, take the patient to
appointments, ask questions during the visits, and talk with family about healthcare needs. They may also be called Medical Navigators.

Remember: As a consumer of healthcare, the most important person to advocate for you is you!

Finding a Patient Advocate
There are many agencies that can help you find a patient advocate. Some services are free of charge; others may charge a fee for their services. Some places to ask include:

- Your local senior center or hospital;
- A counselor or mental health organization;
- The local area Council on Aging;
- Local churches; or
- Public assistance offices.

These offices may have a list of agencies with available advocates. They may also have phone numbers you can call for more information.

If you are interested in researching more information on agencies that provide assistance to healthcare consumers online, you can start by looking at the following websites:

- ShareCare.com
- webMd.com
- patientadvocate.org
- healthwellfoundation.org
- Advoconnection.org

What makes a good advocate?
It isn’t about doing the work for someone else; it is about training the patient to be an advocate for their own health and wellness.

Here are a few helpful tips when considering becoming an advocate for a loved one:

- Identify someone who is in need
- Make sure you have time to dedicate
- Get access to online resources
- Establish the patient’s trust
- Check in often to make sure they have what is needed
- Help the patient advocate for themselves, and bridge the gaps where needed
- Don’t be afraid to ask questions
- Encourage the patient to ask you questions, establish an open line of communication
- Respect boundaries—Allow the patient to speak up for him- or herself

Inform

Accessing and Understanding your Health Records
You have the right to receive copies of your health records. When asking for copies of your record you need to make your request in writing and verify your identity. This is required by law to ensure only patients or their legal representative can access the health records. You can get copies by filling out and signing a “request for release of information form” at your doctor’s office.

Some healthcare facilities may charge a fee for copies. You can reduce this cost by only getting the information you need. Most patients find copies of their outpatient visit summaries or inpatient discharge summaries to be useful, as well as lab tests and x-ray results. The medical records staff should be able to help you in choosing the information you need. You may request to receive copies of your health records either on paper or electronically.

It may take some time for your request to be processed. It is a good idea to ask when you can expect to receive the information. When asking for a copy of your health records make sure you have your photo ID and the fee if your facility charges for records.

If you have any questions about your health record ask your doctor. If you wish to review your health record instead of getting copies, the medical records staff can help guide you to find the information you are interested in reading.

Tips for reviewing your health records:
- Request them during your doctor visit or during your hospital stay.
- Look over them to make sure they are correct. Ask to have any errors corrected before they are shared with another doctor or hospital.
- Ask for any old records that your doctor has on file.

InvolvE
When preparing for a doctor’s appointment, consider the following:

What—Symptom(s), questions, and any past medical information do you need to tell the doctor?
When—Have this information together before your office visit
Where—Have the information in a digital file (on your laptop, tablet, Smartphone, or flash drive); update your patient portal for the doctor; take photos of prescriptions/supplements, or bring copies in a paper format. Store your records in a safe location in your home where they can be found when needed.
Why—Sharing this information with your doctor helps your visit run faster and more smoothly
How—Make copies of test results and other important medical information such as medicines you take. You can also use a CD, DVD, or create a personal health record (PHR). (For more information on how to create a PHR visit myPHR.com.)

*The enclosed check list offers additional information on how to prepare for your appointment.*

Consult
Tips:
Patients, Caregivers, and Advocates: Preparing for a Doctor’s Visit

A Reference Guide

(Checklist Attached)

- Don’t be afraid to ask questions and speak up if you need more answers. Know your rights as a patient and exercise them.
- Ask for more time if you need it. Your doctor may seem to be in a hurry, but they really want to do the best they can for you.
- Let your doctor know how you learn best (reading, listening, or hands-on), so you can receive information that way.
- Schedule appointment times for first thing in the morning or right after lunch, as the waiting times are likely to be shorter.
- Arrive early in case you need to update forms.
- Ask for the doctor’s recommendation for websites to learn more about your condition and maintain the best health status for you and your family.
- Ask the doctor for a brochure about your medical condition.
- Know which symptoms you should be aware of that may indicate the condition is getting worse and when to give the office a call.
- Make sure any specialists you see updates the primary physician who oversees your overall health!
- If you think of any questions after your appointment, call the office and ask them.
- Keep a list of tests performed and match them with results you receive.

Collaborate

Financial Considerations

Ask your doctor and your insurance company these questions:

1. Is this operation or procedure an emergency? How much of it will be covered by my health insurance? If the entire operation or procedure is not covered, approximately how much money will I need to pay?
2. If this is not an emergency, how long can I go before I need this procedure? What will happen if I don’t have the procedure done right now?
3. If my insurance does not cover all the tests and procedures, what is my co-pay?
4. Is there another test, drug, or procedure that could be done that costs less money?

Summary

As a patient you need to be an active team member. The bottom line is that you, the patient, are the most familiar with your body and what you are feeling. Because the time you spend face to face with your doctor isn’t very long, you need to be prepared with a set of questions prior to your visit. The doctor is the expert on figuring out what is wrong with you, but you drive your own healthcare.

Remember, you and your healthcare team are partners. Be prepared and have the information you need to make informed decisions.

Other Helpful Resources

1. Canadian study by BMC Health Services Research. [http://www.biomedcentral.com/content/pdf/1472-6963-14-175.pdf](http://www.biomedcentral.com/content/pdf/1472-6963-14-175.pdf) The study authors
identified many methods of engagement, which they grouped under five categories: inform, consult, involve, collaborate, and empower.

2. “AHIMA, How to request your medical records,”
   http://journal.ahima.org/2012/03/01/how-to-request-your-medical-records/

3. HHS http://healthit.gov/patients-families/faqs/how-can-i-access-my-health-informationmedical-record

4. “Taking Charge of Your Healthcare: Your Path to Being an Empowered Patient” (Consumers Advancing Patient Safety [CAPS])

5. “Communicating with Patients and Families for Smooth, Safe Transitions” (Consumers Advancing Patient Safety [CAPS]) [PDF, 199KB]

6. “Patient Activation Measure® (PAM®)” (Insignia Health)

7. HHS http://healthit.gov/patients-families/faqs/how-can-i-access-my-health-informationmedical-record


9. Healthy Cells Magazine, “Know Your Rights for Self and Family Members.” by Leah A. Grebner, PhD, RHIA, CCS, FAHIMA. Available electronically at:
   http://www.healthycellsmagazine.com/articles/know-your-rights-for-self-and-family-members

Other agencies providing information on patient advocates are:
National Patient Safety Foundation. npsf.org
National Association of Healthcare Advocacy Clinics
Alliance of Professional Health Advocates
Professional Patient Advocate Institute
Patient Advocate-Veterans Health Administration
http://www.va.gov/health/patientadvocate/

References:


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Lucia Aschettino, HITPRO-CP
Leah A. Grebner, PhD, RHIA, CCS, FAHIMA
## Pre and Post-Care Checklist

<table>
<thead>
<tr>
<th>DONE</th>
<th>BEFORE YOUR CLINIC VISIT</th>
<th>DONE</th>
<th>AFTER YOUR CLINIC VISIT</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Picture ID (driver’s license or other)</td>
<td>Get list of medications</td>
<td></td>
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<tr>
<td></td>
<td>Updated family medical information and personal information (cell/e-mail)</td>
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<tr>
<td></td>
<td>Insurance card</td>
<td>Copy of visit summary</td>
<td></td>
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<tr>
<td></td>
<td>List of medications (name and daily dosage) and supplements (name, brand, and daily dosage)</td>
<td>Prescriptions received</td>
<td></td>
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<tr>
<td></td>
<td>List of allergies</td>
<td>Notes taken during visit</td>
<td></td>
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<tr>
<td></td>
<td>Immunization records (Include questions about possible new vaccinations, such as shingles, pneumonia, flu, etc.)</td>
<td>Follow-up appointments</td>
<td></td>
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<tr>
<td></td>
<td>Copies of past records (including eye, dental, and x-rays if needed)</td>
<td>List of tests with results pending</td>
<td></td>
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<tr>
<td></td>
<td>List of questions to ask (make sure the important ones are at the top of the list.)</td>
<td>Review all patient information (visit summary, patient portal, etc.) for accuracy</td>
<td></td>
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<tr>
<td></td>
<td>Advocate or note taker (Take a notebook, iPad, or smartphone to take notes. You can also make a guide for taking notes during your visit. This will prompt you to get all you need to know and ask questions if you need more information. Or bring along a friend or caretaker if you need an extra pair of eyes and ears with you.)</td>
<td>Obtain copy of test results if not on visit summary</td>
<td></td>
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<tr>
<td></td>
<td>Co-pay if required (credit card, checks, or cash for payment)</td>
<td>Talk with doctor’s office about any outstanding test results</td>
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<tr>
<td></td>
<td>Other Doctors’ Contact Information</td>
<td>Sign up for patient portal access (if available)</td>
<td></td>
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<tr>
<td></td>
<td>List and dates of all tests performed</td>
<td>List and dates of all tests performed</td>
<td></td>
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<tr>
<td></td>
<td>Results of recent tests performed from other health providers (Specialist, diagnostic test providers)</td>
<td>Results of recent tests performed</td>
<td></td>
</tr>
</tbody>
</table>
|      | Keep a symptom journal. Write when your symptoms started, how often you experience the symptoms, what makes it worse, and what you have been doing to deal with symptoms.  
- What hurts you?  
- Where does it hurt?  
- How does it hurt? For example, does it hurt all day long or only some of the day?  
- What makes it better, and what makes it worse? This includes medications, activities, and food. |  |  |
|      | Make sure you do all your blood work at least three to five days prior to your visit so your doctor has everything needed for the visit. |  |  |
|      | Medical power of attorney or “advanced directive” document |  |  |

*Visit [Sharecare.com](https://www.sharecare.com) for consumer or patient advocacy related questions. Care-related questions should be directed to your care provider(s).*
## Pre and Post-Care Checklist

<table>
<thead>
<tr>
<th>Done</th>
<th>Before Going to the Hospital</th>
<th>Done</th>
<th>Before Leaving the Hospital</th>
<th>Done</th>
<th>After Leaving the Hospital</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Picture ID (driver’s license or other)</td>
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<td>List of medications</td>
<td></td>
<td>Mark off as results received from outstanding test results</td>
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<td></td>
<td>Insurance card</td>
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<td>Discharge instructions</td>
<td></td>
<td>Obtain copies of results returned post-discharge</td>
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<tr>
<td></td>
<td>List of medications</td>
<td></td>
<td>Prescriptions received</td>
<td></td>
<td>Review all patient information (visit summary, patient portal, etc.) for accuracy—contact hospital to correct any errors</td>
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<tr>
<td></td>
<td>List of allergies</td>
<td></td>
<td>Follow-up appointments</td>
<td></td>
<td>Call your doctor if outstanding test results not received in one week</td>
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<tr>
<td></td>
<td>Immunization records</td>
<td></td>
<td>Doctors’ contact information</td>
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<td>Sign up for patient portal access (if available)</td>
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<td></td>
<td>Copies of past records</td>
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<td>List and dates of tests performed, still waiting for results</td>
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<td>Place discharge instructions in location where you can review them daily</td>
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<td></td>
<td>List of questions to ask</td>
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<td>Review records obtained for accuracy</td>
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<td></td>
<td>Advocate or note taker</td>
<td></td>
<td>Obtain information for signing up for patient portal (electronic access)</td>
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<td></td>
<td>Co-pay if required</td>
<td></td>
<td>Obtain copy of resulted test results if not on visit summary or in patient portal</td>
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<tr>
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<td>Doctors’ contact information</td>
<td></td>
<td>List and dates of all tests performed</td>
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<tr>
<td></td>
<td>Take copies of advance directive documents (living will, healthcare power of attorney)</td>
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<td>Results of recent tests performed</td>
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<tr>
<td></td>
<td>Contact information for individuals you may need to contact during your stay</td>
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