

Before & After the Appointment

PAGE 1 / BEFORE THE APPOINTMENT

Start with what the person wants to say, ask, or decide.

Appointment details

Date / time

Provider / meeting

Location / call details

Appointment type / reason

Who is helping (optional)

What I want the provider or team to know

Use the person's words when possible. They may write, speak, or use another way to communicate.

What my supporter has noticed

Facts, dates, or patterns - separate from the person's own priorities.

My top three questions

1.

2.

3.

What would help at this appointment?

Communication, mobility, sensory, access, or other preferences.

What should we bring or remember?

Records only when needed and authorized.

Optional: I want to speak for myself / with help / have someone share for me.

☐ Myself

☐ With help

☐ Supporter (with permission)

Before & After the Appointment

PAGE 2 / AFTER THE APPOINTMENT

Capture the plan while it is fresh - then share it appropriately.

Appointment date / provider

Next appointment (if known)

What was discussed or decided?

Include the person's understanding and anything they want clarified.

Instructions or changes to confirm

Only record what was actually stated or provided in writing.

Next steps - who will do what, and by when?

NEXT STEP	WHO	BY WHEN

Questions still open / follow-up needed

What are we waiting for? Who will check back?

Who needs an update? Only share with people authorized to receive it.

- ☐ The person
 ☐ Support team
 ☐ Case manager
 ☐ Family / other (as authorized)

Before & After the Appointment

PAGE 3 / REUSABLE QUICK REFERENCE

Use this guide for preparation; print pages 1-2 for each visit.

Different appointment types: a quick starting point

Medical / primary care

Bring relevant current records; note new symptoms, dates, and questions.

Mental health / psychiatry

Bring observations and medication questions; distinguish facts from assumptions.

Therapy / specialist

Ask about accommodations, goals, practice suggestions, and follow-up.

Case management / planning

Start with the person's priorities; review supports, next steps, and ownership.

Your role helps determine what to prepare

The individual	Choose what matters to you and how you want to participate.
DSP / direct supporter	Share objective day-to-day observations and support communication.
Owner / administrator	Check practical follow-through and who needs updated instructions.
Case manager	Connect decisions to goals, services, and coordinated next steps.
Family or trusted supporter	Help the person prepare, participate, and understand the agreed plan.

Privacy & choice

Confirm permission before sharing. Follow existing care records and organizational procedures.

Health & Medical Appointments

Use the questions that fit this visit; bring only information you are authorized to share.

Primary care / annual visit

- BEFORE** Recent changes, concerns, relevant health history, and preferred communication supports.
- ASK** Which screenings or prevention steps make sense? What should we monitor?
- BEFORE LEAVING** Confirm test results, instructions, referrals, and next checkup.

Psychiatry / medication review

- BEFORE** The person's goals, current medication list, observed changes, and relevant logs.
- ASK** What is each treatment intended to help? Which side effects require a call?
- BEFORE LEAVING** Confirm instructions in writing and when to check back.

Dental visit

- BEFORE** Pain, oral-care difficulties, accessibility needs, and comfort preferences.
- ASK** What was found? What daily care or accommodations would help?
- BEFORE LEAVING** Confirm treatment, at-home instructions, and return date.

Vision / hearing appointment

- BEFORE** Changes in seeing or hearing, communication preferences, and devices used.
- ASK** Would glasses, hearing supports, or other adaptations help?
- BEFORE LEAVING** Check device instructions, referrals, and follow-up.

Neurology / specialist

- BEFORE** Dates and patterns of symptoms, previous recommendations, and questions.
- ASK** What changes should be tracked? What requires urgent help?
- BEFORE LEAVING** Clarify tests, results process, and who receives the plan.

Nutrition / dietitian

- BEFORE** Food preferences, routines, access needs, and questions from the person.
- ASK** What realistic changes support their goals and preferences?
- BEFORE LEAVING** Confirm the agreed plan and who can help carry it out.

Therapy & Skill Development

Support the individual's goals, choices, communication, and privacy across therapy visits.

Counseling / behavioral health

- BEFORE** Ask what the individual wants discussed and whether they want support in the room.
- ASK** What goals matter to them? With permission, what support helps between visits?
- BEFORE LEAVING** Clarify any agreed next steps without requesting private session details.

Physical therapy (PT)

- BEFORE** Bring mobility concerns, what is working, and any recommended equipment.
- ASK** Which movements or exercises are appropriate? How can support be safe?
- BEFORE LEAVING** Ask for demonstrations, precautions, and follow-up frequency.

Occupational therapy (OT)

- BEFORE** Bring examples of daily activities the individual wants to make easier.
- ASK** Would adaptations, equipment, or practice routines help?
- BEFORE LEAVING** Confirm recommendations and who can help practice the skills.

Speech / communication therapy

- BEFORE** Bring the person's preferred communication methods and existing supports.
- ASK** How can supporters honor communication choices? Are AAC supports useful?
- BEFORE LEAVING** Confirm strategies and who should be shown how to use them.

Permission first: For counseling and other sensitive visits, the person decides what to share whenever they can. Verify authorization and respect confidentiality.

Planning & Coordination

Use the same before / ask / before-leaving rhythm for service and support meetings.

Case management / ISP review

- BEFORE** Person-defined goals, what works, what does not, and changes they want.
- ASK** Are supports still a good fit? What choices and goals need updating?
- BEFORE LEAVING** Record agreed actions, responsible people, and review dates.

Service coordination / referrals

- BEFORE** Current barriers, questions, pending requests, and the person's priorities.
- ASK** Who will contact whom? What forms, approvals, or options are needed?
- BEFORE LEAVING** Confirm contact details, deadlines, and how progress will be shared.

Team planning / care conference

- BEFORE** Invite the person's input; gather observations with dates and consent.
- ASK** What matters most to the person? Where are decisions or responsibilities unclear?
- BEFORE LEAVING** Summarize the plan in plain language and confirm who follows up.

Three questions worth asking at almost any appointment

- ☐ What does the person most want to understand or change?
- ☐ What is the next step, who is responsible, and by when?
- ☐ How will the person get the results, instructions, or updated plan?

Use with pages 1 and 2: write down the person's questions beforehand, then capture decisions and next steps afterward. Page 3 offers additional quick guidance.