

## **Making the Most of Your Virtual Visit:**

### **Your Comprehensive Appointment Prep Checklist**

This checklist is meticulously crafted to empower you in preparing for your telehealth appointment, ensuring a seamless, highly effective conversation with your healthcare provider, and culminating in a clear, actionable plan for your health journey.

#### **Before the Call (Ideally 30 minutes prior to your scheduled appointment):**

- **Tech Check: The Foundation of a Smooth Connection:**
  - **Test Your Video and Audio:** A few minutes before your appointment, open your video conferencing application (e.g., Zoom, Google Meet, Doxy.me) and perform a quick test. Ensure your camera is working correctly and your microphone is picking up your voice clearly. You can often find a "test call" or "audio/video settings" option within the application. This proactive step helps prevent last-minute technical glitches that can delay or disrupt your visit.
  - **Ensure Your Device is Fully Charged or Plugged In:** Nothing is more frustrating than a device dying mid-conversation. Whether you're using a laptop, tablet, or smartphone, make sure it's fully charged. If your appointment is lengthy, or if your device tends to drain quickly, consider keeping it plugged into a power source throughout the call.
  - **Stable Internet Connection:** A strong, reliable internet connection is paramount for clear video and audio. If possible, use a wired connection, or sit close to your Wi-Fi router. Avoid public Wi-Fi networks for privacy and stability reasons.
- **Quiet Space: Cultivating a Private and Focused Environment:**
  - **Find a Private, Well-Lit, and Quiet Area:** Choose a location where you won't be interrupted and can speak freely about your health concerns without fear of being overheard. A bedroom, home office, or a quiet corner of your living room can work well.
  - **Minimize Distractions:** Inform family members or housemates about your appointment time to avoid interruptions. Turn off notifications on your phone and computer. If possible, choose a background that is uncluttered and neutral to maintain a professional atmosphere for your provider. Good lighting, ideally natural light facing you, will ensure your provider can see you clearly.
- **Prep Your Notes: Organizing Your Thoughts for Clarity:**
  - **Have a Pen and Paper Ready:** Even in our digital age, having a physical pen and paper nearby can be invaluable for jotting down crucial information quickly.
  - **Write Down Your Top Three Concerns:** Before the call, take a moment to reflect on why you are seeking this appointment. Prioritize your concerns. Having

them written down will help you articulate them concisely and ensure you address your most important issues first. This also helps your provider understand your primary needs efficiently.

- **Gather Information: A Comprehensive Health Overview:**
  - **List All Your Medications (Including Supplements and Dosages):** This is a critical piece of information for your provider. Create a comprehensive list that includes prescription medications, over-the-counter drugs, vitamins, herbal remedies, and any other supplements you are taking. For each item, note the name, dosage (e.g., 20mg), and frequency (e.g., once daily). Knowing this helps your provider avoid adverse drug interactions and understand your overall health regimen.
  - **Recent Test Results:** If you've had any recent blood work, imaging scans (X-rays, MRIs), or other diagnostic tests, have the results handy. Your provider may be able to access them electronically, but having your own copy ensures you can refer to them if needed.
  - **Medical History Highlights:** Briefly review your personal and family medical history. Be prepared to mention any significant past diagnoses, surgeries, or chronic conditions that might be relevant to your current concerns.
  - **Symptoms and Duration:** For your current concerns, be prepared to describe your symptoms in detail. When did they start? How often do they occur? What makes them better or worse? Be as specific as possible.
- **Visuals: Enhancing Communication When Applicable:**
  - **If You Have a Rash, Injury, or Other Visible Condition, Prepare to Show It Clearly:** Telehealth allows for visual examinations, but you need to facilitate it. Practice positioning your device so your provider can get a good view.
  - **Use a Good Light Source:** Ensure the area you are showing is well-lit. Natural light is often best, but a lamp positioned to illuminate the area can also be effective. Avoid backlighting, which can make it difficult to see details.
  - **Consider Taking Photos:** If your condition is difficult to show clearly on video, or if it fluctuates, consider taking high-quality photos beforehand. You might be able to share these with your provider during the call or upload them to your patient portal in advance, if allowed.

### **During the Call: Maximizing Your Interaction:**

- **Confirm Identity: A Crucial First Step:**
  - **Start by Confirming Your Name and Date of Birth:** This is a standard and essential security measure for telehealth appointments to ensure you are connected with your correct medical records. Your provider will likely initiate this, but be ready to provide the information promptly.
- **Start with Your Concerns: Direct and Efficient Communication:**
  - **Be Direct and Concise:** After the initial greetings, get straight to the point. A good opening might be: "I'm calling about X, Y, and Z. My main concern today is X because it's affecting me by..." This approach helps your provider understand your priorities immediately and guides the conversation effectively.

- **Explain the Impact:** Don't just list symptoms; explain how they are affecting your daily life. For example, instead of just saying "I have back pain," say "I have severe lower back pain that makes it difficult to sleep and stand for more than 10 minutes."
- **Ask Questions: Active Participation in Your Care:**
  - **Use Your Pre-Written List of Questions:** This is where your preparation pays off. Don't hesitate to refer to your notes. Asking specific questions ensures you get the information you need and feel fully informed about your condition and treatment plan.
  - **Don't Be Afraid to Ask for Clarification:** Medical terminology can be complex. If you don't understand something your provider says, politely ask them to explain it in simpler terms. Phrases like, "Could you explain what that means?" or "Can you rephrase that for me?" are perfectly acceptable.
- **Take Notes: Retaining Key Information:**
  - **Jot Down Key Takeaways:** As your provider discusses your condition, diagnosis, treatment options, and next steps, write down the most important points. This includes medication instructions (name, dosage, frequency, duration), any lifestyle changes recommended, and specific follow-up actions.
  - **Summary of Discussion:** At the end of the call, it can be helpful to briefly summarize your understanding of the plan to your provider, "So, if I understand correctly, I need to take [medication] twice a day, and schedule a blood test next week. Is that right?" This helps confirm accuracy and addresses any misunderstandings.

### **After the Call: Following Through for Optimal Health Outcomes:**

- **Review Follow-Up: Consolidating Information:**
  - **Check Your Patient Portal for a Summary of the Visit:** Most healthcare systems provide a summary of your telehealth visit, including diagnoses, treatment plans, and notes from your provider. Review this carefully to ensure accuracy and to reinforce your understanding. This is also where you might find lab orders or referral information.
  - **Read Any Shared Resources:** Your provider might send links to educational materials, articles, or videos relevant to your condition. Take the time to review these to deepen your understanding.
- **Schedule Tests: Prompt Action for Diagnosis and Monitoring:**
  - **If Blood Work, Imaging, or Other Tests Were Ordered, Schedule Them Promptly:** Delays in scheduling tests can postpone diagnoses and treatment. Make an effort to book these appointments as soon as possible after your virtual visit. Understand any preparation required for the tests (e.g., fasting for blood work).
- **Set a Reminder: Ensuring Continuity of Care:**
  - **Put a Reminder on Your Calendar for Any Future Appointments or Follow-Up Tasks:** Whether it's a follow-up telehealth call, an in-person visit, or a date to reassess your symptoms, mark it clearly on your calendar. Include any

specific actions you need to take before that date (e.g., start a new medication, monitor a symptom). This ensures you stay on track with your care plan and don't miss important milestones.

By diligently following this comprehensive checklist, you will transform your virtual visit from a simple consultation into a highly productive and empowering healthcare experience.