



Helping Clients Prepare for Medical Appointments: Checklist

Helping clients prepare for primary care and specialist medical appointments beyond the [U.S. Domestic Medical Examination for Newly Arriving Refugees](#) (domestic medical screening) can help ensure the best use of time for both clients and health clinics. It also enables clients and clinics to address health needs. This checklist is not a compliance tool for any specific grant or program; always reference your grant agreement and terms for specific program requirements. This is a starting point, not a comprehensive list. Feel free to add any additional checklist items as determined necessary. Document any next steps resulting from the checklist in the Follow-up Notes section at the end.

Preparation	Yes, No, or N/A	Next Steps
Questions to ask prior to the medical appointment		
<i>Is an interpreter needed for the medical appointment?</i>		
<i>If yes, has the interpreter been requested through the appropriate method? This could be through the insurance company, health clinic, hospital, etc.</i>		
<i>Does the client have the clinic's and medical provider's names, contact information, and address, along with the appointment date and time?</i>		
<i>Has transportation to the appointment been discussed and arranged with the client? This could be through the insurance company, public transit, client's personal transportation, etc.</i>		
<i>If the client is taking public transportation, does the client know how to use it to get to the clinic? They could practice by visiting the clinic or by looking at maps/images online.</i>		
<i>Are there any details the client needs to know when arriving at the facility or to find the medical provider clinic upon arrival? If so, have those details been conveyed to the client?</i>		
<i>If applicable and needed, has child care been arranged so the client can attend their appointment?</i>		
<i>If the appointment is virtual, is the client familiar with how to use the online platform to attend their appointment?</i>		
<i>Does the client have an organized folder for their health information? Health information can include the following:</i> <ul style="list-style-type: none"> • Any overseas or domestic medical records that the client has available • Results of diagnostic tests or imaging • List of current health care providers 		

<ul style="list-style-type: none"> List of medications (including prescribed, over the counter, vitamins, and herbal remedies) 		
Has the client completed any new patient forms and signed consent forms?		
Has the service provider reviewed their patient rights and responsibilities with the client?		
Has the client thought about which health issues they would like to prioritize and any questions they want to ask during the medical appointment?		
What clients should bring to the medical appointment		
Folder with the following documents and information, if available:		
Overseas or domestic medical records		
Results of overseas or domestic tests or imaging. This includes results of domestic medical screening if that screening took place at a different health clinic.		
List of medicines (including prescribed, over the counter, vitamins, and herbal remedies) they are currently taking. Ideally, clients should bring their medicine bottles to the appointment or take photos of the medicine labels to show the medical provider.		
Referrals from client's primary care provider or specialists		
List of questions and concerns. Clients should list any questions they have for the medical provider and identify their top health concerns that they want to discuss during the visit.		
List of current health care providers caring for the client. Ideally, the list should contain each provider's name, specialty, phone number, and address.		
Any new patient forms or consent forms that the health facility requires		
Insurance card(s) for each person being seen. If patient is a child, also bring the caregiver's card.		
Photo ID for the patient. If the patient is a child, also bring photo ID for the caregiver. The I-94 is an acceptable form of photo ID if alternative IDs are unavailable.		

Follow-up Notes

If next steps are needed before the medical appointment, document here what needs to be done, who is responsible (e.g., service provider, clinic, or client), and the timeline for completion.

Signature of person conducting preparation meeting

Date

Print name

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