



Helping Clients Prepare for Initial Medical Appointments

Guidance for service providers

Navigating the U.S. health care system can be challenging. This information guide provides tips for service providers working to help newcomers prepare for their initial medical appointments in the United States. This guide was created by Switchboard in collaboration with the Society of Refugee Healthcare Providers.

What do clients need to know prior to their initial medical appointments?

Prior to their initial medical appointments, service providers should review with clients how the U.S. health care system works and answer any questions. Clients may have received health orientations before traveling to the U.S. and/or shortly after arrival. However, a review is helpful for the following reasons:

- Clients can experience information overload from receiving lots of information at once
- Orientations cannot always cover specific details about the health care system
- The U.S. health care system is challenging and complex to navigate, even for native English speakers who were born in the United States



Helping clients prepare for their initial medical appointments helps the appointments be successful for both the clients and medical providers.

Need an introduction to or refresher about the U.S. health care system? Switchboard has an [archived webinar](#) and accompanying [downloadable guide](#) for service providers about how to coach clients on navigating the U.S. health care system.

What do clients need to do before their initial medical appointment?

To best prepare for their visit, clients may want to complete the following tasks before the day of the medical appointment. Some of these tasks may need to be finished many days in advance or at the time the appointment is scheduled (for example, requesting an interpreter).

Service providers often assist clients with these preparatory tasks for the initial appointment(s). The goal is to coach clients on how to complete these tasks on their own for future appointments. Clients with more complex health needs may require more intensive health case management, longer periods of coaching, and accompaniment to medical appointments.

Request an interpreter

Clients should request an interpreter in their preferred language for medical appointments. Even clients who speak English conversationally or fluently may prefer to have an interpreter. This can be helpful because medical terms in English may be unfamiliar to clients, or clients may feel more comfortable describing their health concerns in a language other than English.

When and how to request an interpreter depends on the type of health facility where the appointment will take place and on the client's insurance (or lack thereof). For example, many hospitals and federally qualified health centers have access to interpreters. Clients should therefore request an interpreter when scheduling the appointment.

For other appointments, the interpreter may have to be requested through the client's health insurance company. Often interpreters need to be booked far in advance of the appointment.

Arrange transportation and map the route

It is extremely important that clients arrive early to their medical appointments. Arriving more than 15 minutes late or missing appointments due to travel issues can result in expensive fees and delays in receiving necessary health care. Too many missed appointments

can result in clinics deciding to discontinue caring for the clients as patients.

Mapping out where the appointment is located and how clients will get there helps clients arrive on time. Service providers can assist clients in two ways:

- **Scheduling transportation:** For example, through a volunteer; voucher for a rideshare service; or through the health insurance, state Medicaid, or other local programs.
- **Mapping the route:** If clients are taking public transportation, identify the bus or train they will take and where it stops. Clients may even want to take a practice journey on public transportation to time how long it takes. (This makes for a good intern/volunteer activity.) If there is not time for a practice trip, talk clients through the journey and show them images online of key landmarks.

Remember to share with clients any details they need to know once they arrive at the health facility, such as a certain door to use or floor to go to. This is especially important for appointments at hospitals, which are large and potentially confusing to navigate.

Interpreters for medical appointments often must be scheduled far in advance, sometimes more than 10 days prior to the appointment.

Organize health-related documents

It can be overwhelming for both health care providers and clients to manage a large stack of medical documents. If possible, arrange and label documents into sections (for example, have a folder for each family member or health issue).

Help clients list any clinicians they are seeing in the U.S. with the provider's name and specialty. Have clients take pictures of all their current medicine bottle labels and any other supplements or traditional remedies to show at the appointment. For clients who cannot read documents, work with them to select visual cues that can help identify the most important papers or cards to show medical providers (for example, a sticker on the back of their insurance card).

Complete new patient forms

New patients at medical offices often have long forms to complete about their demographic information, medical history, emergency contacts, and current health concerns. They must also typically read and sign to indicate their consent on important documents about the clinic's treatment and cancellation fee policies, insurance billing, and privacy information.

Clinics will often ask clients to arrive early to their appointments to complete these forms or to complete them independently online. Newcomer clients may need additional time to fully complete the forms if they need an interpreter, if they have lots of health information to recall, and/or if they need additional explanation about certain questions or unfamiliar terms. It can be stressful to try to rush through the forms right before the appointment. Clients may also lack privacy if they are completing the forms with an interpreter in the waiting room.

If possible, assist clients with completing these documents before the day of the appointment, using an interpreter if needed. This saves clients and clinics valuable time and ensures that clients can ask questions while completing the forms.

New patient forms can often be found digitally through a clinic's electronic portal or can be printed from the clinic's website. Alternatively, service providers can ask the clinic for a copy of the forms to keep on file.

Review expectations, including rights and responsibilities

As a refugee service provider, you may need to inform clients of their health care rights and responsibilities. The American Medical Association lists [patients' rights](#).

Clients' health care responsibilities include:

- Knowing whether the provider they are going to see accepts their insurance
- Scheduling appointments in advance
- Arriving early or on time
- Canceling appointments at least 24 hours in advance
- Being open and honest with providers
- Speaking up if they feel uncomfortable
- Having realistic expectations about what can be covered at one appointment
- Keeping their own records of medical care, including a folder of referrals, prescriptions, receipts, and bills (particularly if they are going to have many appointments)

Health Care Rights

As a refugee service provider, you may need to inform clients of their health care rights. These include the following:

- **Partnering with their doctor:** In many places around the world, doctors are viewed as authorities who shouldn't be questioned. In the U.S., however, clients can ask questions and actively partner with their providers to create a treatment plan.
- **Consenting to receive treatment:** Clients can agree to or decline any medical treatment before it's given.
- **Access to/privacy of medical information:** Clients' medical information is confidential, belongs to them, and cannot be accessed by anyone else without written consent. Clients have the right to access their medical records.
- **Access to interpretation:** Interpretation must be available over the phone or in person at no cost to the patient. It is required by law for any organization that receives federal funding, including Medicaid. Clients do not have to bring their own interpreter. If a provider refuses patients because they don't offer in-house interpretation, advocate by reminding them of their legal responsibility and brainstorming possible solutions.
- **Choice of provider:** Clients may ask for another doctor if they are uncomfortable or feel they aren't being respected.
- **Input over scheduling:** If clients are offered an appointment that doesn't fit their schedule, they can ask for another day or time.

Service providers can help clients manage expectations and plan their health care journey in the U.S. by coaching them that appointment times are often short. Depending on how complex the client's

Checklist: What Clients Need to Bring to Medical Appointments

Clients should plan on bringing the following to their initial medical appointments. This applies for both primary care and specialist appointments:

- **Test results**, including any translated test results from overseas, results from their primary doctor or another specialist, and any test results from their initial health screening (also known as the domestic medical screening) if that screening took place at a different health clinic.
- **List of medications and supplements** clients are currently taking or need to continue taking. If possible, bring the medicine bottles so providers can see the dosages and other details. Clients can also take photos of the bottle labels with their phones and show them to the provider.
- **Insurance card(s) and photo ID.** An I-94 can work if clients do not yet have their photo ID.
- **Referrals** from their primary care provider if they are seeing a specialist for the first time. Health insurance often requires referrals.
- **List of questions and concerns clients have for the medical provider**, including the top one or two health concerns that they want to discuss during the visit.
- **List of current doctors** treating the client so that the medical provider knows who is on the client's care team.
- **Forms**, including any new patient forms or consent forms that the health facility requires.

For a fillable version of this checklist, [visit the Switchboard website!](#)

health concerns are, the medical provider may only have time to discuss one or two concerns per visit.

Explain to clients that prioritizing a few concerns ensures that the medical provider can gather as much information as possible to provide the best care possible in a short amount of time. Also, there is sometimes a disconnect between the health issues clients want to prioritize or find most concerning versus what the medical provider feels is more urgent based on their medical knowledge. Clients should partner with their medical providers to talk through clients' concerns and to understand medical providers' reasoning for prioritizing certain health issues.

If clients have complex health needs and know that they will want more time with the medical provider, service providers can work with the clinic to assess what should be done. Options may include the following:

- Scheduling multiple appointments with the medical provider over a shorter time period (for example, weekly appointments)
- Asking the clinic if they offer block scheduling, where they may be able to offer a longer appointment time and see multiple family members at once
- Scheduling a longer visit (this will depend on the clinic's policies, medical provider's schedule, and insurance requirements)
- Scheduling a visit with a supporting staff member who may be able to address some of the client's needs rather than the medical provider (for example, if the clinic has a patient navigator)

What can clients expect at their initial medical appointment?

Requirements for appointments will vary depending on the facility and type of medical appointment. Clients should expect, however, to take the following common steps at their initial appointment:

1. Arrive at least 20 minutes early on the day of their appointment (or earlier, if specified by the clinic).
2. Sign in at the front desk and wait in the lobby until the receptionist calls their name.
3. Prepare to show insurance card(s) and photo ID to the receptionist.
4. Complete any forms or provide the receptionist with the forms completed ahead of time.

Case Example: Assisting Anab,* a mother of a child with complex health needs

*Name and identifying details have been changed to protect clients' privacy

Anab is a single mother of several children. She and her family are newly resettled in the U.S. Her youngest child, a boy, has many health conditions that require visits to several different specialists. Anab is an English language learner who also does not read or write in her home language. Anab has many strengths, including that she was able to successfully navigate three other countries' health systems to find care for her son.

The service provider worked with Anab to leverage her strengths so she can continue to be actively involved in her son's care. Together they developed a way for Anab to build confidence. To start, Anab wanted to be able to identify which health papers were which. Anab selected different stickers that had meaning to her, which she put on the back of her and her children's health insurance cards. That way she could confidently hand the correct card to the clinic receptionist.

A volunteer then met Anab and her family at their apartment building to practice taking the bus to her son's primary care doctor. The volunteer showed Anab which bus number to take and where to disembark. Anab took photos with her phone to help her remember key landmarks. She also took a picture of the clinic building. The volunteer practiced walking into the clinic with Anab, showing her which floor to go to, and which door was the clinic's. They practiced signing in at the front desk. The volunteer also introduced Anab to the support staff.

Following this practice, Anab felt comfortable taking her son to his primary care appointments. She continued to work on building her skills and confidence in navigating other aspects of the U.S. health system with the assistance of the refugee service provider.

5. Once their name is called, they will meet the nurse or medical assistant. The nurse or medical assistant may check their pulse, blood pressure, weight, height, and ask some health questions such as, "What brings you here today?" (What health issues are they experiencing?)
6. Clients will be taken to an exam room for privacy.
7. After waiting, the clinician(s) will enter the room. They will ask more health questions and examine the client. They may want to order tests, prescribe medicine, refer clients to specialists, or see the client for follow-up appointments.
8. When the appointment is over, the client will check out at the front desk. This is a good time to schedule any follow-up appointments needed.

Conclusion

There are many steps service providers can take in partnership with clients to support their navigation of the U.S. health care system, beginning with helping to make clients' initial medical appointments a success. Successful initial appointments can set a foundation for a positive working relationship between the clinics and the clients and build clients' self-advocacy skills.

Clients with complex health needs may require more support, such as additional coaching and accompaniment. This time is well spent to help provide client-centered services that can ultimately remove barriers to clients thriving in their new home.

Resources

[Assisting Newcomers with Navigating the U.S. Health System](#): This archived webinar from Switchboard is accompanied by a downloadable guide.

[Healthcare in the U.S.](#): This page from Settle In is available in multiple languages.

[National Resource Center for Refugees, Immigrants and Migrants](#): This organization supports health departments and community organizations working with newcomer populations.

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