

APPOINTMENT PREPARATION CHECKLIST

PatientLead Health | Trauma-Informed Care Tools

BEFORE SCHEDULING

- Verified provider accepts my insurance
- Asked about trauma-informed care approaches when calling
- Confirmed appointment length allows adequate time for my concerns
- Arranged transportation/support person if needed

PRIORITY LIST (Limit to 2-3 main items)

- Priority 1: _____ Details: _____
- Priority 2: _____ Details: _____
- Priority 3: _____ Details: _____

QUESTIONS TO ASK

- _____
- _____
- _____
- _____

ITEMS TO BRING

- Insurance cards and ID
- Current medication list (with dosages)
- Care statement or preference summary
- Previous test results/medical records (if relevant)
- Priority list and questions
- Comfort items (water, snacks, phone charger)
- Notebook or phone for taking notes
- Support person (if planned)

PRE-APPOINTMENT SELF-CARE

- Planned something nurturing for after the appointment
- Practiced grounding techniques in case needed
- Reviewed boundary-setting phrases
- Contacted support system about the appointment
- Given myself permission to reschedule if too overwhelmed

PORTAL MESSAGE SENT (if applicable)

- Outlined main concerns
- Mentioned trauma-informed care preferences
- Requested specific accommodations needed

POST-APPOINTMENT NOTES SPACE

- What went well: _____
- What was challenging: _____
- Follow-up needed: _____
- Provider rating (1-5): _____ Would I see them again? _____