Appointment Notes

Take organized notes and prepare for your next appointment.

Made by a Registered Behavior Technician who works with autistic kids and their parents every day.
thesupportshelf.org

How to use this

You wait six weeks for the appointment. It lasts fifteen minutes. Then you are in the parking lot trying to remember what she said about the dose. This sheet slows the fifteen minutes down.

It has three parts. **Before:** ten minutes the night before to decide what you need out of the visit. **During:** one page to write on while they talk. **After:** five minutes in the car to pin down who does what, by when.

The same three parts work for a pediatrician, a BCBA, a school meeting, a neurologist, a dentist. The provider changes. Your job in the room does not.

START HERE IF

The appointment is tomorrow and you have ten minutes tonight	Before, page 2
You are in the waiting room right now	During, page 3
You just got home and your head is full	After, page 4
You want one sheet to print a stack of and keep in the binder	Pages 5 and 6
You are not sure what to ask	Page 7

> **You have one job in the room.** It is not to remember everything. It is to get your three questions answered and leave knowing what happens next. Everything else goes in the big box on page 3, and you sort it later.

Before: decide what you need

Ten minutes, the night before. Most of the value of the visit is decided here, not in the room.

APPOINTMENT

Thurs Mar 12, 2:30, Dr. Okafor's office, 3rd floor

WHO I'M SEEING, AND WHAT THEY ARE

Dr. Okafor, developmental pediatrician

WHAT THIS VISIT IS FOR

Follow-up on the new medicine. Six-week check.

WHAT'S CHANGED SINCE LAST TIME

Sleeping worse since the new school started. Stopped eating yogurt. Two good weeks at therapy, then a hard one. New word: "more."

THE THREE QUESTIONS I MOST NEED ANSWERED, IN ORDER

1 *Is the new medicine why he is sleeping worse, or is it the school change?*

2 *Do we keep this dose, or is it changing?*

3 *Should the school know about any of this?*

In order matters. If the visit runs short, you asked the one that counted. Say question 1 before they start. If a question is about safety, such as running off or hurting themselves or someone else, it is question 1 every time.

WHAT I'M BRINGING

- [ ] Insurance card and photo ID
- [ ] List of current medicines and doses, including vitamins
- [ ] The last report or notes from this provider
- [ ] Anything new from other providers since last visit
- [ ] Any log I have kept (sleep, food, ABC sheet)
- [ ] A snack and a comfort item for my child
- [ ] This sheet and a pen
- [ ] _____

During: write it down, ask again

Words, arrows, numbers. Not sentences. You will sort it in the car. If your child is with you and it gets loud, write less and ask for a printed summary at the end.

WHAT THEY SAID

dose stays same 4 more wks → recheck · sleep: likely school, not med · "give it till spring break" · referral OT (handwriting) · wants weight check next time

WHAT THEY WANT ME TO DO

Keep sleep log 2 wks. Call OT once referral is in. Bring log next visit.

WORDS I DIDN'T UNDERSTAND, TO LOOK UP OR ASK ABOUT

"titrate"

"prior auth"

YOU CAN SAY THIS. OUT LOUD. MORE THAN ONCE.

"Can you say that again in plain words? I want to get it right."

Good providers are glad you asked. If they are rushing, "Can I read back what I heard?" works too, and it catches mistakes on both sides.

My three questions from page 2, asked and answered: ☐ 1 ☐ 2 ☐ 3

After: pin down who does what

Fill this in before you leave the parking lot. In ten minutes the details blur. By dinner they are gone.

WHAT I AGREED TO DO

THE THING	BY WHEN	DONE
Start the sleep log tonight	*Tonight*	☐
		☐
		☐
		☐

WHAT THEY WILL DO

THE THING	BY WHEN	HAPPENED
Send OT referral	*By Friday*	☐
		☐
		☐

WHAT I'M STILL UNSURE ABOUT

Whether the dose is "same for now" or "same for good." Call Monday and ask.

WHO I CALL IF IT DOESN'T HAPPEN

Marisol at the front desk, ask for the nurse line

NEXT APPOINTMENT

Apr 23, 10:00, same office. Weight check + sleep log.

Ask the "who I call" question before you leave the room: "If I haven't heard about the referral by Friday, who do I call?" Write down a name, not just the office. Then this sheet goes in the binder, and the next one goes on the fridge.

The one-sheet: front

Pages 2 and 3 on one side of one piece of paper. Print this and the next page back to back, five at a time, and keep the stack in the binder.

Before

THE NIGHT BEFORE

DATE, TIME, WHERE

WHO, AND WHAT THEY ARE

THIS VISIT IS FOR

WHAT'S CHANGED SINCE LAST TIME

MY THREE QUESTIONS, IN ORDER. QUESTION 1 FIRST, BEFORE THEY START.

1

2

3

Bringing: ☐ cards ☐ med list ☐ last notes ☐ my log ☐ snack ☐ pen

During

WORDS, NOT SENTENCES

WHAT THEY SAID

WHAT THEY WANT ME TO DO

WORDS TO LOOK UP OR ASK ABOUT

"Can you say that again in plain words?" is always allowed. Asked and answered: ☐ 1 ☐ 2 ☐ 3

The one-sheet: back

Page 4 on the back. Fill it in before you leave the parking lot.

After

IN THE CAR, FIVE MINUTES

WHAT I AGREED TO DO

THE THING	BY WHEN	DONE
		☐
		☐
		☐
		☐

WHAT THEY WILL DO

THE THING	BY WHEN	HAPPENED
		☐
		☐
		☐

WHAT I'M STILL UNSURE ABOUT

WHO I CALL IF IT DOESN'T HAPPEN (A NAME, NOT AN OFFICE)

NEXT APPOINTMENT: WHEN, WHERE, WHAT FOR

SORTED FROM THE FRONT: THINGS I WANT TO TELL SOMEONE ELSE (SCHOOL, BCBA, OTHER DOCTOR)

When it's filled in, it goes in the binder behind this provider's tab. The Care Binder has the tabs.

Questions worth asking any provider

Not all of them. Check the two or three that fit this visit and copy them onto page 2. These are the ones parents tell us they wish they had asked the first time.

- [ ] **What should I watch for at home?**
  Gets you the specific signs, good and bad, instead of "keep an eye on it."
- [ ] **What would make you want to see us sooner than the next appointment?**
  Draws the line between "wait and see" and "call today."
- [ ] **How do I reach you between visits, and how fast do you usually answer?**
  Portal, nurse line, email. Ask before you need it.
- [ ] **Who else should know about this?**
  School, BCBA, the other doctor. You are usually the only one who talks to all of them.
- [ ] **Can you say that in plain words?**
- [ ] **What are the other options, including waiting for now?**
  Every plan has alternatives. You are allowed to hear them.
- [ ] **How will we know if it is working, and about when?**
  Gives you something to write on page 4 under "what I'm watching for."
- [ ] **What is the next step, and who takes it?**
  You, them, or a third office. Half of all delays live in this answer.
- [ ] **Is there anything I should stop doing?**
- [ ] **Can I get a copy of that?**
  The report, the plan, today's notes. You are entitled to your child's records.
- [ ] **If I haven't heard back by then, who do I call?**
  A name. Write it on page 4.
- [ ] **Is there anything you'd want to know that I haven't told you?**
  Catches what you forgot. Providers like this one.

MY OWN, FOR THIS PROVIDER

Does the clinic have a parent group?

If your child has an ABA team, parent training is usually part of the plan. "What's in the parent-training part, and when do we do it?" is a fair question for any BCBA.

What now

One appointment, start to finish, with the sheet. That is the whole assignment.

THIS WEEK

- [ ] Print pages 5 and 6 back to back, five copies. Put the stack in the binder.
- [ ] Take one sheet out for whatever appointment is next, even the dentist. Fill in Before tonight.
- [ ] Pick your three questions. Page 7 if you are stuck. Question 1 is the one you would be most upset to leave without.
- [ ] Take the sheet in. Write in the box. Ask for plain words at least once.
- [ ] Fill in After in the parking lot, before you turn the key.

AFTER A FEW OF THESE

Read the "What they will do" tables across three or four sheets. Anything that was promised and never happened is your next phone call. That is what the sheets are for: not a record of the visit, a record of what is still owed.

NEXT ON THE SHELF

The Care Binder (Get Organized) is where these sheets live: a tab for every provider, a contact sheet, an authorization tracker, a phone-call log, and a one-page "About my child" you can hand to anyone new.

Important Documents (Get Organized) covers the papers that come up at these visits, such as the diagnosis report, evaluations, insurance letters and the treatment plan: what each one is for, and where to keep it.

If either one isn't out yet, the email box on its shelf at thesupportshelf.org/shelf will tell you when it is. One email, then nothing else.

The Support Shelf is made by a Registered Behavior Technician, not a doctor or a BCBA. These pages help you prepare for and record an appointment. They do not tell you what to ask for or what to do. The provider in the room does that, and if something you heard worried you, they are the person to ask.