

# Getting ready to see a Medical Specialist



## Quick Reference Guide

Medical Services

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## Now that I've found a specialist, what do I do?

The directories and other resources you used should have their contact information listed. Using that information, reach out to their offices and request an initial appointment. This may also be called an initial consultation or intake evaluation. Make sure to say that you're a prospective, or new, patient!

**This process takes time - you may need to reach out to several specialists before you find one who meets your needs!**



**Remember, if your insurance company requires you to have a referral from your primary care provider (PCP), schedule an appointment with your PCP first before you make any appointment with a medical specialist!**

## What should I bring to this appointment?

**You should bring:**



**Your medical insurance card**



**A method of payment for any out-of-pocket costs (such as a co-pay) you need to pay.**

- Note that some offices only take credit or debit cards. Ask their office if you have questions!

**Any relevant health history or medical records. This may include:**



- Any current or older prescription medications
- A list of previous treatments or procedures
- The results of clinical exams or laboratory tests performed by other health care providers.
- To get these records, contact your former health care providers.



# I'm getting ready for the appointment. What should I ask the specialist?

Finding a specialist that meets your needs and supports you can be an extensive process. We've provided some questions to help guide this process. While this list is not exhaustive, these are some questions to get you started!

You might also consider looking at some webpages to find a doctor, including the [US National Institute of Health](#), [BlueCross BlueShield](#), [Health.gov](#) or find your own.

## Guiding questions to reflect on when choosing a provider



- › Do I prefer a provider that shares identities with me (race, ethnicity, gender, sexual orientation, language, or cultural background)?
- › How far am I willing to travel to find a provider? Do I want them to offer same day services or telehealth appointments?
- › When do I have time in my schedule to go to the provider for planned visits? Does this overlap with their hours? Weekends, evening hours, etc.
- › How do I want to be able to regularly communicate with the provider?



## Questions to ask **BEFORE** meeting with a provider



- › Do they accept my insurance? Are they accepting new patients?
- › How can we communicate outside of an in-person visit? Do they do telehealth? Do they have a messaging or email system to reach my provider between visits?
- › How much experience do they have in treating & supporting patients with my concerns or conditions?
- › Do they have experience with my specific condition? Does their focus within the specialty match my needs?
  - For example, if you want to see a neurologist for headaches, you want someone who focuses on headaches, not spinal conditions.

## Questions to ask **DURING** the initial visit



- › Can you explain how you support people with my condition?
- › What is your approach to the patient-provider relationship?
- › How can I access or review my medical records in your system? How are lab results communicated? How is this information relayed to my primary care provider or other providers?
- › What is the process if I need to come back for a follow-up visit?

## Questions to reflect on **AFTER** meeting the provider



- › Did they answer my questions? Did they seem to listen and acknowledge what I was saying?
- › If you had an in-person appointment, did you feel comfortable in their space? Was it easy to navigate?
- › Is their website or app easy to navigate? Can you easily find the information you need?
- › How much time did the provider spend with you? Did this feel like enough time to address your concerns?

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