

Getting ready for a primary care visit



Quick Reference Guide

Now that I've found the name of a provider that I like, what do I do?

What should I bring to this appointment?

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

- Guiding questions to reflect on when choosing a provider
- Questions to ask BEFORE meeting with a provider
- Questions to DURING the initial visit
- Questions to reflect on AFTER meeting the provider

 [Medical Services](#)

 [Health Promotion Appointment](#)

Now that I've found a PCP, 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 PCPs before you find one who meets your needs!

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 provider?

Finding a primary care provider 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 web pages to find a provider, 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, gender, sexual orientation, languages, ethnicity, or cultural background)?
- › Do I know of any friends/family/coworkers who may have a provider in the area and can provide a recommendation?
- › How far am I willing to travel to find a provider? Do I want same day services or telehealth appointments?
- › Are there health topics that I want more support or expertise in from the provider?

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



- > Do they accept my insurance? Are they accepting new patients?
- > With my insurance, what do I need to pay to see the provider (co-payments, co-insurance, etc.)? What about for common laboratory tests?
- > What are their hours? Do they split time between different locations? What is the wait time to get in to see the provider? Do they offer same-day appointments? Walk-ins?
- > Where is the provider located? Are they in a convenient location for me — along my commute, easy travel distance, etc.

Questions to ask **DURING** the initial visit



- > What is your approach to the patient-provider relationship?
- > How can we communicate outside of an in-person visit? Do you do telehealth? Do you have a messaging or email system for us to communicate between visits?
- > How do you schedule follow-up visits or discuss lab results? Are these scheduled visits or walk-ins? Are results in a secure email, phone-call, or in-person visit?
- > How can I access or review my medical records in your system?
- > How does your office manage referrals? Can referrals be facilitated through a telehealth appointment (where appropriate)?
 - If you have any chronic conditions, ask about the provider's experience in supporting patients with your same conditions.

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



- > Did they answer my questions? Did they seem to listen and acknowledge what I was saying?
- > Do they have experience treating & supporting patients with my diagnosis?
- > If you had an in-person appointment, did I feel comfortable in their space? Was it easy to navigate?
- > Is their website or app easy to navigate? Can I easily find different information that I need?
- > How long did the provider spend with me? Did this feel like enough time to address my concerns?
- > Did they demonstrate competency towards my identities? Did they make any assumptions or statements that made me feel uncomfortable?

