

Making the Most of your Healthcare Appointment

Bring your health insurance and identification card.

The 10 most useful medical records and health information that you should bring to that first visit with primary care provider (PCP).

Note: If you or your loved one have been maintaining a personal health record, this is the type of information that should be a part of your personal health record.

1. List of chronic health conditions.

This would include any conditions that you currently see a healthcare provider for or are being monitored.

- The year the condition was first diagnosed, or any other major milestones related to the disease.
- Past conditions which are no longer being actively treated.
- A list based on what any previous PCP has been focused on.

2. Medication list.

Bring an updated list of all prescribed medications, along with any over-the-counter medications vitamins, herbal remedies, dietary supplements and medical devices.

Including: other products such as CBD/ THC/cannabis, nicotine patches/ gum/lozenges

Also helpful:

- Highlight any new or recently started medications;
- List any recently stopped medications (e.g. from the past 6 months);
- For each, include this information:
 - The name
 - Why you take it
 - How often, how much, and how you take it (like a pill or injection)
 - Who prescribed it (if it's a prescription medication)
- List any medications you believe have been problematic in the past.
 - Didn't work
 - Allergies or reactions

3. Laboratory results.

Most commonly these are results from blood tests and urine tests. Any lab results from the past 1-2 years will be helpful.

Specific tests that are likely to be useful include:

- Complete blood count (CBC)
- Electrolyte panel, which usually includes sodium, potassium, chloride, CO₂, glucose
- Renal panel, which usually includes creatinine and blood urea nitrogen (BUN)
- Thyroid function tests, such as thyroid-stimulating hormone (TSH) and/or free thyroxine (FT4)
- Liver Functions (LFT's) or hepatic functions. This includes ALP, ALT, AST and GGT
- lipid/cholesterol panel
- Urine analysis

Do bring any lab results you have. It is useful to see what other healthcare providers have ordered and checked.

- Also bring results from different dates if at all possible. Lab results are much more useful when a trend or context can be evaluated. In many cases, comparing the latest results to previous results is extremely useful.

4. Radiology and imaging results.

This includes x-ray reports, ultrasound reports, CT scans, MRIs, etc. Radiology medical records from the last 1-5 years are especially useful.

5. Other medical diagnostic reports.

These might include pulmonary function tests, EKGs, cardiac catheterization reports, biopsy results, neuropsychology evaluations, and so forth. It's especially useful to have medical reports that are related to the diagnosis or management of a current chronic condition.

6. Hospital and emergency department reports.

Try to get a copy of the narrative reports that clinicians create when a person comes to the emergency room or is hospitalized. These medical records are the reports that are written by healthcare providers, for other healthcare providers. **Note: these are not same reports as the patient discharge instructions that are always handed out.**

You may have to file a medical records request to obtain the medical records that are most useful. You do have a right to obtain your own records upon written request, or your power of attorney for healthcare can do so. Some agreeable clinicians will just print them out in the office for you, if they have online access to them.

Specific examples of useful reports include:

- **Emergency room clinical note.** This is the note dictated (or typed) by the emergency room healthcare provider who managed your loved one's visit.
- **Hospital Admission History & Physical.** This is the note dictated by the admitting healthcare provider, when a person is initially admitted to the hospital.
- **Hospital Discharge Summary.** This is the note dictated by a discharging clinician, when a person is discharged to home or rehabilitation. It usually summarizes the patient's hospital course.

7. List of involved clinicians.

List the healthcare providers who were previously involved in your care

For each specialist, it's helpful to know when you established care, and how often you'd been seeing each provider. Your list might include:

- Primary care provider
- Medical specialists, such as cardiologists, pulmonologists, urologists, neurologists, etc.
- Behavioral medicine clinicians, such as psychologists, counselors, and therapists
- Skilled nursing facility providers, if relevant (for instance, if your aging parent is currently at the facility, or recently was discharged)
- Other skilled medical therapists, such as for physical, occupational, or speech therapy
- Any other health professional who is significantly involved in you or your parent's care

8. Clinical visit notes.

Visit notes written by the primary care provider, and the medical specialists, can be useful. At a minimum, try to get a copy of the last note.

Start by requesting notes from the last 3 visits, or the last year. If it's easy to get more notes from each provider, you can do so as well.

If your previous healthcare providers had a patient portal, check to see if the complete visit notes are available there, as some major health systems have begun making clinical visit notes available in this way.

9. List of other providers of supportive services.

Have you or your loved one been getting help from a care manager? In-home aides? A patient navigator? A good primary care provider should be interested in knowing who has been involved, and what kind of help they've been providing.

10. Advance care planning documents.

These include any durable power of attorney documents, advance directives, living wills, pre-hospital DNRs, and/or [POLST \(Physician Orders for Life-Sustaining Treatment\)](#) forms.

How a Personal Health Record Can Help

This is the medical information that healthcare providers should know, in order to provide you with good care.

The ideal process, of course, is to collect medical information into some kind of personal health record system as you go along, so that you have all the information handy if you ever need to switch healthcare providers. If you currently have a patient portal, it usually only holds information from one particular practice, and you might lose access if you leave the practice. For this reason, it's good to keep your own copy of your medical records, separate from the online patient portals.

So for instance, every time you or your loved one has a lab test done, you would ask to get a copy of the results (or download them from your patient portal), and then you would file these results in your paper or digital personal health record.

But if you haven't been maintaining a personal health record, a switch to a new primary care provider is the perfect time to start one.

So if you have the time, energy, and interest in being proactive, gather up these medical records and bring them to that new patient visit. Your new provider will thank you, and you should be able to get better healthcare.

