

# Prepare for a Visit or Conversation

Use this worksheet for a health visit, a child care meeting or a discussion with a support organization. It helps organize a conversation; it is not an assessment or medical record.

Start with your main question and any observations before the visit. Use the later sections to record the explanation and agreed actions during the conversation. You do not need to complete the whole sheet in advance.

Keep completed notes private. The online page and saved text file do not send your answers to NPF.

## Before the conversation

**The person or organization I will speak with:**

\_\_\_\_\_

**Date, time and time zone:**

\_\_\_\_\_

**How the conversation will take place:**

\_\_\_\_\_

**My main question:**

\_\_\_\_\_

\_\_\_\_\_

## What have I noticed?

Describe events in your own words. Include when something happens or changes, without trying to decide on a diagnosis.

**Observation:**

\_\_\_\_\_

\_\_\_\_\_

**When it began or when I noticed it:**

\_\_\_\_\_

\_\_\_\_\_

**How it affects daily life:**

\_\_\_\_\_

\_\_\_\_\_

**What has already been tried or discussed:**

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**What do I need in order to take part?**

Consider interpretation, disability access, transportation, a support person, a private conversation or a written explanation.

**Access or practical needs to arrange:**

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**Questions to consider**

- What does the recommendation mean in my situation?
- What is it intended to address?
- What options apply, and what are their limits?
- Can you show or explain that again?
- How will I know whether the plan is working?
- Who should I contact with a concern before the next appointment?

**Other questions I want to ask:**

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**During the conversation**

**The explanation I received:**

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**What I still do not understand:**

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**Information or an official source to read:**

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You can say: “I want to check that I understood. Here is what I think we agreed.” Ask the other person to correct anything you have misunderstood.

## Before the conversation ends

| Next action | Who will do it? | When? | How will we confirm it? |
|-------------|-----------------|-------|-------------------------|
|             |                 |       |                         |
|             |                 |       |                         |
|             |                 |       |                         |

**How results or updates will be communicated:**

**When to check back if I have not heard:**

**When to seek help sooner:**

## Afterward

Keep instructions from a qualified professional in their original form. If your notes conflict with those instructions, ask for clarification rather than changing a care plan yourself. Do not wait for a routine appointment when an urgent problem needs attention.

## Three examples of a focused opening

These are fictional conversation prompts, not medical findings or completed care plans.

**For a postpartum visit:** “I want to discuss how recovery is affecting my day and understand which concerns I should contact you about between visits.” Ask the clinician to provide the care instructions and appropriate contact route.

**For a child's health visit:** “I have noticed a change in how my child joins familiar activities. Could we discuss what I am seeing and whether further assessment is needed?” Bring concrete observations rather than a proposed diagnosis.

**For a child care meeting:** “Arrival has been difficult this week. I would like to compare what happens before we leave home with what happens after I leave the setting.” Ask for observations and agree on a manageable adjustment.

## Completed example: a child care conversation

**Main question:** How can arrival be clearer for the child?

**Observation:** The child becomes upset at the door. The parent does not know what happens next.

**What has been tried:** Different goodbyes on different mornings, without an agreed plan.

**Information to obtain:** Who receives the child and what staff notice after the parent leaves.

**Agreed action:** The parent and caregiver choose the same short goodbye for the next few mornings. The caregiver gives an update at the agreed check-in.

**Review:** They discuss whether the handoff is clearer and what remains difficult. They do not promise the child will never feel upset.

## Example: arranging a postpartum conversation

**Main question:** How can I discuss a recovery concern if I cannot get to the office easily?

**Practical need:** Help with transport and arranging care for another child.

**Before contact:** Put the concern first, then explain the practical barrier. Do not decide that the appointment can wait because transport is difficult.

**Record for this fictional exercise:** The caregiver has contacted the practice about the concern and asked how the practical barrier can be addressed. The practice is responsible for explaining the appropriate care and contact route. Transport has not yet been arranged; the caregiver is also asking a trusted person about a ride.

**Follow-up:** The caregiver confirms the care arrangement with the practice and whether the ride is available. If the barrier remains unresolved, they contact the practice again rather than assuming the visit can be missed. Any urgent concern uses the appropriate urgent route.

## Completed example: a referral after a child's visit

**Main question:** What will the recommended referral address?

**What needs explanation:** Who makes the referral, who contacts the family and whether a separate appointment is required.

**Agreement for this fictional exercise:** The practice sends the referral; the caregiver contacts the receiving service using verified details. The caregiver checks availability and any paperwork with that service.

**Still unconfirmed:** The appointment date and any fees. A referral does not establish that the child has a diagnosis or a place in a service.

**Follow-up:** Record the practice's actual check-back instructions. If the service is unavailable, contact the referring team about the next step instead of assuming the referral has resolved the concern.

## Leave room for the actual professional explanation

Do not prefill a clinician's recommendation from an example. Record what was said in your own appointment, ask for written instructions and keep the original directions available. If you do not have an answer, write “to ask” rather than filling the gap with a guess.

**One question I still want explained:**

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**Where I will get the answer:**

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**Who needs the agreed information:**

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## Related resources

[Read Preparing for Well-Child Visits](#) · [Save this worksheet as text](#)

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