

Preparing for a first consultation with a healthcare professional can feel overwhelming, especially if it's your first time consulting a specialist or using new tools like **online video appointments** and **remote consultations**. Many patients focus solely on their symptoms, but there is much more to bring along to make the appointment as productive as possible.

In this guide, we'll cover everything you need to bring and prepare beyond your symptoms, how to handle remote versus in-person consultations, why clinician qualifications matter more than location, and how to make the most out of your time by asking the right questions during and after your appointment.

## Why Clinician Qualifications Matter More Than Location

One misconception I encountered frequently during my 12 years helping patients across Merseyside and beyond is that the physical location of the clinic is the most important factor. In reality, the clinician's qualifications, experience, and communication skills matter far more.

Whether your consultation is in-person at a prestigious hospital or a remote video appointment with a specialist miles away, the priority should be:

- Checking the clinician's credentials and sub-specialisations
- Confirming their experience with your condition
- Understanding their approach to patient communication and follow-up

Don't hesitate to ask "Who exactly will I speak to?" before your appointment. Knowing the name, title, and specialties of the clinician can help you prepare more specifically and set expectations for your consultation.

## Remote vs. In-Person Appointments: Clarity is Key

Remote consultations — whether by video call, phone, or online messaging systems — have become commonplace and convenient. But they have different preparation needs compared to in-person visits.

### Preparing for a Remote Consultation

- **Technical setup:** Ensure your device (computer, tablet, smartphone) supports the platform the clinic uses and test your internet connection beforehand.
- **Private environment:** Find a quiet, private room with good lighting so you can speak openly and the clinician can see you properly.
- **Documents handy:** Have any relevant documents or notes easily accessible either physically or digitally, so you can refer to them or share files if needed.

### Preparing for an In-Person Consultation

- **Travel and timing:** Factor travel time, parking, and any COVID-19 related requirements like masks or testing.
- **Physical copies of documents:** Bring printed copies of any previous scans, test results, or treatment notes.
- **Plan questions in advance:** Having a written list of questions will help you remember to ask everything important during your consultation.

Regardless of the format, never accept vague phrases like "quick consult" without clarity on follow-up plans and next steps — if your symptoms and history are complex, that is a red flag.

# Preparing Symptom Notes and Medication Lists

Before the appointment, take time to prepare clear notes to provide a full picture to your clinician. This is especially important when you might only have limited time to speak.

## How to Prepare Symptom Notes

1. **Date of symptom onset:** When did you first notice the symptoms?
2. **Symptom description:** Be specific about what you feel, where, and how intense or frequent symptoms are.
3. **Symptom triggers or relievers:** Note anything that makes symptoms better or worse.
4. **Progression:** Have symptoms changed or spread over time?
5. **Impact on daily life:** How are symptoms affecting your work, sleep, mood, or activities?

## Why Bringing a *Medicines List* Is Essential

One of my biggest frustrations is when patients forget to bring a comprehensive list of their current and past medicines — including prescription drugs, over-the-counter remedies, and supplements. Many clinics now request this in advance, especially for *remote consultations*.

Your **medicines list** should include:

- Name of each medicine
- Dosage and frequency
- Reason for treatment
- Any recent medication changes or side effects experienced

This allows your clinician to avoid harmful interactions and understand your treatment history fully.

## Bring Previous Treatment Notes and Test Results

If you've seen other specialists or undergone tests before, bring relevant reports, scans, and lab results. This applies to both in-person and online appointments:

- Upload digital copies or emails to the platform in advance for remote consults
- Bring hard copies or a folder if attending in person

These documents save time by preventing repetition and help the clinician make an informed diagnosis.

## The Must-Have Checklist for Your First Consultation

|                                           |                                                                    |                                                                         |
|-------------------------------------------|--------------------------------------------------------------------|-------------------------------------------------------------------------|
| Item                                      | Why It Matters                                                     | Tips                                                                    |
| Symptom notes                             | Helps the clinician understand your condition fully and accurately | Write clear timelines and descriptions; bring a printed or digital copy |
| Medicines list                            | Prevents interactions and informs treatment decisions              | Include all medications, doses, and recent changes                      |
| Previous treatment notes and test results | Provides context and avoids unnecessary repetition                 | Bring digital files for video consults; physical for in-person          |
| Questions for clinician                   | Ensures your concerns are addressed and you leave with clarity     | Prepare in advance; prioritise most urgent queries                      |
| Technical check (for remote)              | Avoids delays and frustration during the consult                   | Test connection, microphone, camera; have contact numbers handy         |
| Private, quiet space (for remote)         | Ensures confidentiality and attentiveness during the consult       | Inform household members; choose a room with good lighting              |
| Confirmation of appointment details       | Prevents confusion about time, platform, and clinician             | Check appointment letter/email for exact time and access links          |

# Asking Questions During and After the Consultation

Don't leave your consultation without asking questions. Many patients feel rushed or unsure about what to ask, so coming prepared helps. Here are common focus areas to cover:

## Questions About Diagnosis and Next Steps

- What is your preliminary diagnosis based on my symptoms and test results?
- Are there additional tests or investigations needed?
- What treatment options do you recommend?
- Are there any side effects or risks I should be aware of?

## Clarifying Treatment and Follow-Up

- How soon should I expect to see improvement?
- Will I need to see you again, and when?
- What signs or symptoms should prompt me to seek urgent help?
- Can you explain any prescriptions or lifestyle advice clearly?

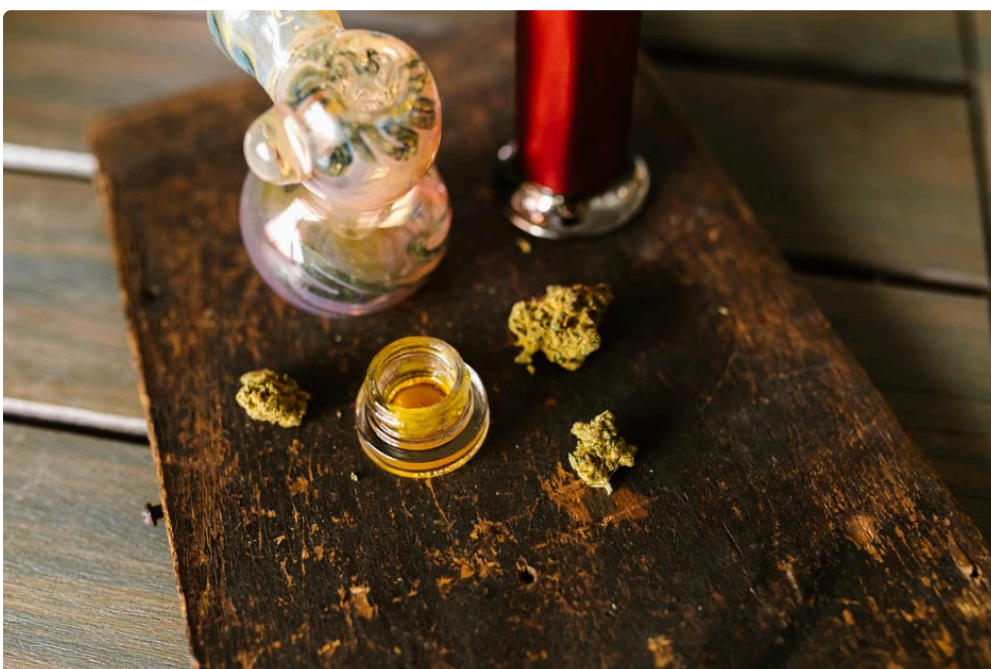
## Post-Consultation Support

If something isn't clear during the appointment, ask how to contact the clinic or clinician afterwards for follow-up questions. Many providers now offer secure messaging or patient portals for this purpose.

Never accept being rushed off the call or visit without a clear plan and next steps – if that happens, politely request clarification or contact the clinic administration for assistance.

## Summary

Your first consultation is a vital step on your healthcare journey. To make the most of it:



- Focus on the clinician's qualifications rather than just location
- Clarify if the appointment is remote or in-person and prepare accordingly

- Bring a thorough medicines list and previous treatment notes
- Prepare detailed symptom notes to share
- Write down questions in advance and don't hesitate to ask during and after your appointment
- Ensure you have a private, quiet space for remote consultations and check your technology ahead of time
- Insist on clear next steps and follow-up plans before ending the consultation

With this preparation, you can approach your first consultation feeling confident and empowered, enabling your clinician to give you their best care, regardless of whether it's online or face-to-face.



If you have any questions or need advice on preparing for your next consultation, feel free to reach out. Remember: always ask, *"Who exactly will I speak to?"* <https://www.clickliverpool.com/features/68489-finding-specialist-healthcare-from-liverpool-the-questions-worth-asking-first/> – this small question can make a big difference in your healthcare experience.