



The Appointment *Advocacy Pack*

A practical, printable companion for clearer medical appointments.

Use the pack. Do not complete the pack.

This is a working document, not another health project. Print only the pages that solve the job in front of you.

THE 20-MINUTE VERSION

If your appointment is soon: complete the one-page appointment brief, choose three questions, and take the after-appointment record with you. That is enough.

☐ **Choose the pages you need**

You do not need to disclose or organise everything at once.

☐ **Write in plain language**

Specific examples of what you cannot do are often more useful than dramatic adjectives.

☐ **Keep your originals**

Bring copies of summaries and relevant results. Do not hand over your only copy.

☐ **Name one main objective**

A test, referral, review, explanation, treatment discussion, or agreed next step.

☐ **Leave with a record**

Write down what was agreed, who is responsible, and when you should follow up.

IMPORTANT

This pack helps you organise and communicate. It cannot assess symptoms, tell you which tests or treatments are appropriate, or replace professional medical advice. Seek urgent help for urgent or rapidly worsening symptoms.

The 20-minute appointment reset

Do the first five. Everything after that is optional.

- 01 ☐ **Write the single main objective**
If time runs out, what must the clinician understand or decide?
- 02 ☐ **Complete the one-page brief**
Use the next page. Keep it factual, current and relevant to this appointment.
- 03 ☐ **Choose three questions**
Mark the one question that must be answered.
- 04 ☐ **Find the relevant result or letter**
Bring the full report where possible, not only a remembered headline.
- 05 ☐ **Plan how you will record the outcome**
Notes, a support person, or a written summary immediately afterwards.
- 06 ☐ **Brief your support person**
Tell them the objective and when you want them to step in.
- 07 ☐ **Protect the hour after**
If possible, leave recovery time rather than scheduling something demanding.

My one-page appointment brief

NAME

APPOINTMENT DATE

WHY I AM HERE - ONE SENTENCE

The main objective

MOST IMPORTANT CURRENT SYMPTOMS

Keep to 3-5

FUNCTIONAL IMPACT

What work, care, sleep or daily tasks are affected?

RELEVANT DIAGNOSES OR WORKING HYPOTHESES

Clearly separate confirmed from being investigated

TREATMENTS TRIED AND WHAT HAPPENED

Include current medication if relevant

WHAT I NEED BEFORE I LEAVE

Decision, test, referral, explanation or next step

Symptoms are only half the clinical story

Functional impact makes severity concrete. Use examples that are true for you; do not inflate or minimise.

SYMPTOM / PATTERN

WHAT IT STOPS OR CHANGES

A USEFUL SENTENCE

"The symptom I most need help with is _____. It happens _____ and means I cannot reliably _____."

What has already been tried?

A short summary prevents the appointment from restarting your story at zero.

TEST / TREATMENT	DATE	RESULT / EFFECT	WHAT HAPPENED NEXT

RELEVANT RESULT OR LETTER I AM BRINGING

REMEMBER

A result being described as normal answers a specific question. It does not automatically explain persistent symptoms. Ask what was ruled out, what was not assessed, and what the next step is.

The shortest useful timeline

Use approximate dates where necessary. Include only events that help explain the current question.

ONSET

When did this begin, and what changed?

FIRST HELP

When did you first seek care, and what was the initial explanation?

KEY CHANGE

What became worse, different or more disabling?

TESTS / DIAGNOSES What important results or diagnoses followed?

TREATMENTS

What helped, did nothing, or caused problems?

NOW

What is the current problem and why does it need attention now?

Three questions, in priority order

If only one is answered, make sure it is the right one.

01

MY QUESTION

ANSWER / DECISION

02

MY QUESTION

ANSWER / DECISION

03

MY QUESTION

ANSWER / DECISION

BEFORE THE APPOINTMENT ENDS

"Could we summarise what we have agreed, who will do what, and when I should follow up if I have not heard?"

When the answer is "everything looks normal"

You do not need to dispute the result. Clarify exactly what it means and what happens next.

01 What does this result rule out - and what does it not rule out?

02 Does the test assess the symptom or mechanism we are trying to explain?

03 Were there borderline findings, trends, or limitations worth discussing?

04 Given the functional impact, what else might reasonably be considered?

05 What would make you investigate further or refer me?

06 If we are waiting, what timeframe and warning signs should trigger review?

THE ANSWER IN MY OWN WORDS

Calm words for difficult moments

Use only what feels safe and natural. The goal is clarity, not winning an argument.

IF ANXIETY IS OFFERED AS THE WHOLE EXPLANATION

"I understand anxiety can affect the body. I would like to avoid treating this as either physical or psychological too early. What physical causes have been considered, and what would make further investigation appropriate?"

IF YOU ARE ASKED TO WAIT

"What specific change are we waiting for, how long should I wait, and what should bring me back sooner?"

IF YOUR IMPACT IS BEING MINIMISED

"Whatever the eventual diagnosis, this is affecting my ability to _____. What can we do next to investigate or manage that level of impairment?"

IF A REQUEST IS DECLINED

"Can you help me understand the reason, what alternative you recommend, and what information would change that decision?"

IF YOU LOSE YOUR WORDS

"I am finding it difficult to explain this clearly. Could we pause while I refer to the summary I brought?"

Make the request specific

Ask for a discussion, record the answer, and avoid presenting a test or diagnosis as the only acceptable outcome.

A TEST OR INVESTIGATION

"Would this investigation be appropriate given _____? If not, what would you recommend instead?"

A REFERRAL

"Could we discuss whether referral to _____ is appropriate, and what criteria I need to meet?"

A SECOND OPINION

"Given the impact and uncertainty, I would like to ask about another clinical opinion. What route is available in this service?"

MORE TIME

"This feels more complex than we can resolve today. Can we arrange a follow-up or longer appointment?"

THE RECORD

"Could the symptoms I reported, the decision and the agreed next step be included in the record?"

UK NOTE

You can ask for a second opinion, but there is not a general automatic legal right to one. Routes and funding vary. Ask the clinician, service or GP what process applies, and use PALS or the complaints process if you need help understanding how a request was handled.

Brief the person coming with you

Their job is to help you stay present and leave with an accurate record - not to take over.

MY MAIN OBJECTIVE

THE POINT I MAY FORGET OR MINIMISE

PLEASE STEP IN IF

For example: I lose track, become overwhelmed, or the main question is missed

PLEASE DO NOT

For example: speak for me, soften the impact, introduce unrelated history

PLEASE WRITE DOWN

Decisions, names, timeframes and exact next steps

AFTERWARDS, HELP ME

OPENING LINE

"This is _____. They are here to help me take notes and keep track of the questions I prepared."

Record the outcome while it is fresh

CLINICIAN / SERVICE / DATE

WHAT I UNDERSTOOD THE CLINICIAN TO SAY

WHAT WAS AGREED

WHO IS RESPONSIBLE?

BY WHEN?

WHAT REMAINS UNCLEAR OR UNADDRESSED

MY NEXT ACTION

A short follow-up message

Use this to confirm your understanding or ask for correction. Keep it factual and brief.

SUBJECT

Follow-up from appointment on [date]

Hello [name / team],

Thank you for seeing me on [date]. I am writing to check that I understood the outcome correctly.

My understanding is:

1. [Decision or working explanation]
2. [Test, referral, treatment or action]
3. [Who will do what, and expected timeframe]

The point I remain unclear about is [one concise question]. Please let me know if I have misunderstood anything or if this would be better discussed in another appointment.

Thank you,
[name]
[date of birth or patient number only if appropriate]

MY SUBJECT LINE**THE ONE POINT I NEED CLARIFIED****PRIVACY**

Use the secure contact route recommended by your service. Do not include more personal or medical information than the recipient needs to identify you and answer the question.

The appointment can be over before you process it

A difficult appointment is not proof that you communicated badly or that your symptoms are not real.

☐ **Write the facts first**

What was said, decided, refused, requested, and left unresolved.

☐ **Separate outcome from emotion**

Both matter. Record the outcome before the details blur; process the emotional impact safely afterwards.

☐ **Choose one next action**

Follow up, wait to the agreed date, request records, book another appointment, or ask about another opinion.

☐ **Notice what helped**

The summary, support person, wording or preparation you want to reuse.

☐ **Protect your capacity**

If possible, do not make major decisions while activated or exhausted.

WHAT HAPPENED - WITHOUT JUDGING MYSELF

THE ONE NEXT ACTION

FIELD NOTE

You are allowed to be strategic in the room and honest about the cost afterwards. A clear clinical summary is a tool; it is not the whole truth of what this has taken from you.

Keep the pack useful.

Keep its limits visible.

This pack combines practical preparation patterns from Rest Reclaimed's existing patient-advocacy material with current official NHS information. It is designed for UK readers but much of the preparation is location-neutral. Processes and rights vary by country, service and circumstance.

ACCESSING RECORDS

NHS App: GP health record help - nhs.uk/nhs-app/help/health-records-in-the-nhs-app/gp-health-record/

PATIENT RECORD RIGHTS

NHS England Digital: Access to patient records through the NHS App - digital.nhs.uk

SECOND OPINIONS

NHS: Mental health assessments - section on getting a second opinion - nhs.uk

QUESTIONS ABOUT CARE

NHS England: Patient Advice and Liaison Service (PALS) and NHS complaints guidance - england.nhs.uk

VERSION

First edition / reviewed 25 July 2026

CORRECTIONS

If something is unclear, inaccurate or no longer current, contact Rest Reclaimed through the website.

REST RECLAIMED

Practical, honest help for medically complicated lives.