

Telehealth Treatment: Before the First Visit

Confirm the visit arrangements with your provider before you rely on a phone or video appointment. Keep the joining instructions and a backup contact where you can reach them.

Prepare the visit [1]

- Check the date, time zone, joining instructions and any requested forms.
- Ask about the charge and any accessibility help you need, such as captions or a screen reader.
- Choose a quiet place where you can talk openly; test your device, connection and sound.
- Keep a short question list and your medicine information nearby. Do not join while driving.
- Ask for a visit summary and instructions for follow-up.

Ask the office about your actual arrangements

Before the visit	Question to confirm
Where I will be	Can this clinician see me from the location I will be in? What location/contact information do you need?
Privacy	Who may be present? What should I do if I cannot find a private space?
If the connection fails	Do you call me, should I call you, or should I rejoin? What number should I use?
If urgent help is needed during the visit	What plan should we follow, and what local contact information do you need?
After the conversation	How are prescriptions, tests, referrals or an in-person visit arranged if needed?

Original worked example

You will be visiting family on the appointment date. Tell the office where you will physically be and ask whether the visit can proceed from there. "The link works" does not answer the location question.

Keep notes private. Write or type short notes. Use another copy if you need more room. Save and reopen the PDF to check your answers.

My visit card

Confirmed appointment and joining instructions

Provider; date/time/time zone; where instructions are saved. Do not write a portal password here.

Location, privacy or access arrangements

What I have confirmed; what still needs a response.

Backup contact and plan

Office number and their instructions if the connection fails.

My priority question

What I most want to understand before the visit ends.

Original question sheet

The location, privacy and care-arrangement questions are prompts to ask your provider. They do not state a licensing rule, promise a prescription, or guarantee telehealth is suitable for your needs.

Sources and Further Reading

[1] [HHS: What Should I Know Before My Telehealth Visit?](https://telehealth.hhs.gov) (telehealth.hhs.gov)