Identity and safe contact

MI-01 - Fictional completed example.

Write unknown, not applicable, or prefer to discuss privately. Ask staff for help.

1. About you

Full name used for your clinic record

Morgan Lee (fictional)

Date of birth (write the month in words)

14 March 1987

Name you would like us to use; pronouns if you want to share

Morgan; they/them

Who answered these questions? Who helped, if anyone?

Morgan answered; no helper.

2. How can the clinic contact you safely?

These are requests for staff to confirm. Name the contact method and any limits together.

Phone number; is it shared? Best time for a call?

202-555-0147; shared phone; weekdays after 3 pm.

May we leave a voicemail? If yes, what may it say?

No voicemail. Do not leave the clinic name or appointment details.

May we send appointment texts? Which number? Any limits?

No text messages to the shared phone.

Email or portal contact preference; any limits?

Use my own portal account. No email notifications until discussed privately.

Safe mailing address, or ask staff to discuss another option

Prefer to discuss privately; do not use an old address without checking.

If we cannot reach you, what alternative should staff discuss?

Call again during the agreed time; discuss a backup route with me at check-in.

Support, contacts and visit preparation

MI-01 - Fictional completed example.

Write unknown, not applicable, or prefer to discuss privately. Ask staff for help.

Name / clinic record reference: Morgan Lee (fictional)

3. Communication and access

Preferred language for speaking and written information; interpreter request

English for speaking and writing; no interpreter requested.

What would help you use the form or attend? (For example: large print, reading help, step-free access)

Large-print appointment instructions.

4. People you want the clinic to know about

An emergency contact, helper and legally authorized representative are different roles. Staff confirm the role and permitted sharing separately.

Emergency contact: name, relationship and phone; or discuss privately

Taylor Lee; sibling; 202-555-0182; emergency contact only.

Does someone help with forms or act for you? Name, role and what you want staff to clarify

No representative identified. Do not create portal access for Taylor from this entry.

5. Payment or coverage, when relevant

Give coverage identifiers directly through the clinic's approved process when requested. Ask about private handling of billing communications.

Coverage or payment arrangement: plan name, self-pay, unknown, or help requested

Coverage card to be provided privately at check-in; eligibility not yet checked.

Anything you want to discuss about billing contact or financial assistance?

Please discuss where billing communications go before using an address.

6. Visit preparation and updates

Main reason for the appointment, in your own words, or discuss privately

Establish care; discuss my health history privately with the clinical team.

Date completed; what has changed since any earlier form?

26 October 2026. Contact choices above replace my older reminder preferences.