



VA Blue Button: Exploring Your Mental Health Notes

P.L.A.N. Strategy

The P.L.A.N. approach was developed to help you have a productive conversation with your clinician. It includes four basic steps to help you clearly express your question or concern, while working toward a solution.

Step 1: Prepare for your appointment

Preparing for your appointment can help make the most of limited time with your clinician. Think in advance about specific questions or concerns you would like to talk about and write them down. If you have a lot of questions, prioritize your list with your most important questions first. [Use the Communication Guide on the next page to write down your questions.](#) You can even bring it to your appointment!

Step 2: Lead the conversation

Bring your list of questions or concerns to the appointment, as it's easy to forget things in the moment. At the beginning of your appointment, let your clinician know that you would like to talk about your mental health notes. For example, "Before we get started today, I have a couple of questions about my notes that I'd like to talk about." Refer to your list of questions and state your questions clearly and plainly.

Step 3: Be Assertive

As you and your clinician are discussing your concerns, be sure to ask questions if something is unclear. An important part of advocating for yourself is balancing assertiveness (making sure your needs are addressed) with respect and understanding for your clinician. This will help to maintain a good working relationship.

Step 4: Next Steps

After your appointment, it can help to reflect on the conversation with your clinician and think about what you learned and what remains unclear. If your clinician has recommended any resources, make use of them to get additional information or do more research on your own. If you have more questions, ask your clinician at your next appointment.

Communication Guide

You can use the **P.L.A.N. approach** (which has four steps: **P**repare, **L**ead, **A**ssertive, **N**ext) to help you have a conversation with your clinician about your mental health notes. To **P**repare, use the space below to write down the questions you have about your notes. You can bring this list to your appointment or simply use it to help organize your thoughts.

1)

2)

3)

Not sure how to phrase your questions? Consider these examples:

- “Can you help me understand what _____ means?”
- “What is the reason that my notes have information about _____?”
- “I might have found an error in my notes, where it says _____. Can we sit down together to discuss it?”