

New Member Checklist

- [Schedule a New Member Meeting & Building Tour](#) with the Member Liaison if you wish to discuss any questions you may have or transition of care to Yale Health
- Contact your primary care department and schedule your first appointment.
- Contact the [Yale Health Pharmacy](#) regarding information about refill requests, prescriptions transfers, and prescription coverage.
- Complete an [Adult New Patient Questionnaire](#) for each adult family member and a [Pediatric New Patient Initial Questionnaire](#) for each child in your family.
- These forms can be brought to your first appointment, or sent directly to our [Health Information Management](#) team.
- Complete a [Release of Health Information Form](#) for each member of your family to have copies of your medical records sent to Yale Health. Please send this form to the [Health Information Management](#) team.
- Complete an [Insurance Update Form](#) if you or any of your dependents have an alternate insurance plan. Send this form to the Coordination of Benefits team at [Yale Health Billing](#).
- Sign up for [MyChart](#). MyChart is your personal health record and online connection to your medical home. You can get an activation code at your first appointment, [online now](#), or call MyChart Support, 203-688-5101.