Medical Appointment Transportation Planner

Confirm the ride · plan the return · keep details together

A practical caregiver planner for one medical visit: pickup, assistance, contacts, and the journey home.

A free resource from

The Caregiving Concierge™

by AdVantage Digital LLC

thecaregivingconcierge.com

Medical Appointment Transportation Planner

Appointment · timing · outbound ride

Plan the appointment trip from pickup to home again.

Use one copy per scheduled, non-emergency visit. Confirm details with the clinic and ride provider. Mark anything not yet confirmed as “pending.”

THIS PLANNER IS FOR (NAME)

PRIMARY CAREGIVER

APPOINTMENT DATE

CAREGIVER PHONE

1 CONFIRM THE VISIT AND ARRIVAL TIME

PROVIDER / CLINIC

CLINIC PHONE

DESTINATION STREET ADDRESS

BUILDING / ENTRANCE / FLOOR / ROOM

APPOINTMENT TIME (AM / PM)

REQUIRED CHECK-IN TIME (AM / PM)

PARKING / DROP-OFF INSTRUCTIONS

2 BOOK THE OUTBOUND RIDE [1]

DRIVER / TRANSPORTATION SERVICE

DRIVER / DISPATCH PHONE

PICKUP ADDRESS / EXACT MEETING POINT

PICKUP TIME / WINDOW (AM / PM)

BOOKING / CONFIRMATION NUMBER

TRAVEL / PARKING BUFFER

CONFIRMED WITH / DATE

OUTBOUND RIDE STATUS

☐ Confirmed ☐ Pending

Confirm both directions; plan the return on the next page.

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Medical Appointment Transportation Planner

Assistance · escort · return arrangements

3 CONFIRM HELP AND EQUIPMENT [1]

Ask what help is included. Do not assume a driver can enter the home, help with transfers, wait, or accompany someone inside.

- ☐ Confirm vehicle space and arrangements for mobility equipment.
- ☐ Agree who will help from home to vehicle and vehicle to reception.
- ☐ Confirm whether a companion can ride, wait, and travel home too.

HELP / EQUIPMENT / VEHICLE ARRANGEMENTS CONFIRMED

COMPANION / PERSON HELPING

COMPANION PHONE

4 CHECK PROCEDURE-SPECIFIC REQUIREMENTS [2]

For a procedure or sedation, ask the clinic about escort, discharge, and supervision requirements. Follow its instructions; a ride booking alone may not meet them.

CLINIC INSTRUCTIONS / REQUIRED ESCORT / HELP AT HOME

5 ARRANGE THE RIDE HOME [1]

Confirm the return separately, including who will call if the end time is uncertain.

RETURN DRIVER / SERVICE

RETURN DRIVER / DISPATCH PHONE

RETURN PICKUP SPOT / WHERE THE PERSON WILL WAIT

RETURN TIME / WINDOW (AM / PM)

WHO WILL REQUEST THE RIDE / PHONE

RETURN ADDRESS (IF DIFFERENT) / WHO WILL MEET THEM

☐ Return confirmed ☐ Pending ☐ Call when ready

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Medical Appointment Transportation Planner

Costs · backup · day-of check

6 CONFIRM COSTS AND A BACKUP [1]

TOTAL ROUND-TRIP COST / HOW TO PAY

COVERAGE / ELIGIBILITY CONFIRMED BY

WAITING / EXTRA FEES

CANCELLATION DEADLINE / PHONE

BACKUP DRIVER / SERVICE

BACKUP PHONE

IF THE RIDE IS LATE OR CANCELLED, WHO WILL CALL THE CLINIC?

7 CHECK BEFORE LEAVING

- [ ] Reconfirm both rides, meeting points, assistance, and contact numbers. [1]
- [ ] Bring requested paperwork, medication information, and visit questions. [3]
- [ ] Bring needed aids and equipment, plus a charged phone or contact card. [3]
- [ ] Share the ride plan; confirm who will help after the visit, if needed.

FOLLOW-UP / CHANGE TO THE RIDE PLAN	WHO / BY WHEN

Mark unconfirmed arrangements as “pending.” A written plan does not book a ride or verify eligibility, coverage, or the help a service can provide.

Everything about your loved one's care, organized in one place.

The Caregiving Concierge™ helps families organize appointments, providers, medications, documents, schedules, transportation details, and other important care information in one secure workspace.

Sources informing this resource · Planner prompts by TCC
[1] NADTC — Technical Assistance FAQ: local transportation options
[2] MedlinePlus — Conscious sedation for surgical procedures
[3] National Institute on Aging — Taking Someone to a Doctor’s Appointment

Source links checked September 10, 2026. Confirm service and clinic requirements directly.