Preventive Screening Tracker

Discuss the options · record the plan · track results and follow-up

A caregiver organizer for the screening decisions, dates and follow-up that the person and care team agree are appropriate.

Individual screening plan · dates · responsible clinic

Track the plan the person and clinician agree on.

Screening looks for disease before symptoms appear. The right tests and timing depend on the person's circumstances. This tracker is not a universal screening schedule. [1]

THIS TRACKER IS FOR (NAME)

PRIMARY CAREGIVER

PLAN REVIEWED ON

CLINICIAN / PHONE

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1 RECORD THE SCREENING DISCUSSION AND DECISION

SCREENING / TOPIC	LAST DONE / RECORD SOURCE	CLINICIAN'S PLAN / NEXT DATE

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2 QUESTIONS TO CLARIFY BEFORE SCHEDULING [3]

- [ ] Ask about likely benefits, downsides and the person's preferences.
- [ ] Confirm preparation, accessibility, transportation and any cost questions.
- [ ] Record a decision to defer or not screen, and when to revisit it, if advised.

Completion · result discussion · next review

3 CLOSE THE LOOP AFTER A SCREENING [2]

SCREENING / DATE	RESULT DISCUSSED WITH / DATE	FOLLOW-UP / WHO / BY WHEN

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SCREENING / DATE	RESULT DISCUSSED WITH / DATE	FOLLOW-UP / WHO / BY WHEN

4 KEEP OPEN QUESTIONS VISIBLE

RESULT NOT RECEIVED / FOLLOW-UP STILL TO ARRANGE

NEXT PLAN REVIEW / RESPONSIBLE PERSON

CLINIC CONTACT FOR QUESTIONS

Bring new symptoms to the care team rather than waiting for a routine screening date. Confirm the meaning of results and any follow-up with the clinician; this worksheet does not interpret them.

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Sources informing this resource · Original worksheet prompts by TCC

[1] MedlinePlus — Health Screening

[2] MedlinePlus — How to Understand Your Lab Results

[3] National Institute on Aging — How To Prepare for a Doctor's Appointment

Sources checked September 10, 2026. Use the person's individualized care instructions.

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.

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