Doctor Appointment Prep Checklist

Prepare for the Visit, Capture What Matters, and Follow Through

A practical caregiver tool for organizing concerns, questions, visit notes, and next steps.

A free resource from The Caregiving Concierge™ by AdVantage Digital

Walk into the appointment with the important details already gathered - so you can spend more of the visit listening, asking, and clarifying.

Use one packet for each appointment. Fill in what is useful for this visit and leave the rest blank. Keep the completed pages with the person's care records so another caregiver can understand what happened and what comes next.

This checklist is for (name) _____

Primary caregiver / person attending _____

Appointment date / time _____

Provider / specialty _____

Office / location _____

Phone _____

1. Appointment snapshot

Reason for today's appointment

_____

_____

Appointment type

- ☐ Routine follow-up
- ☐ New concern
- ☐ Specialist consultation
- ☐ Test / lab review
- ☐ Post-hospital follow-up
- ☐ Other

Our top 3 priorities for this visit

1 _____

2 _____

3 _____

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Before we leave home

Doctor Appointment Prep Checklist

Person	Appointment date	Provider

- ☐ Medication list reviewed and updated if needed
- ☐ Questions and top concerns written down
- ☐ Relevant records, test results, or discharge papers gathered
- ☐ Home readings or symptom notes gathered, if relevant
- ☐ Insurance / identification available if needed
- ☐ Another caregiver or family member updated, if needed

Tip: Put the questions that matter most at the top. Appointment time is limited, and a short priority list makes it easier to remember what you most want to discuss.

2. What's changed since the last visit?

Think about changes in everyday life as well as symptoms. Check anything you want to mention, then use the space below for details. You do not need to fill in every box.

☐ Pain / discomfort	☐ Appetite / eating	☐ Weight
☐ Sleep	☐ Energy / fatigue	☐ Mobility / walking
☐ Balance / falls	☐ Memory / thinking	☐ Mood / behavior
☐ Bathroom habits	☐ Breathing	☐ Swelling
☐ Skin changes	☐ Daily activities	☐ Other

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Changes, symptoms and observations

Doctor Appointment Prep Checklist

Person _____ **Appointment date** _____ **Provider** _____

Symptoms or observations we want to discuss

Symptom / observation	When did it begin?	How often?	What seems to make it better or worse?

Recent events the provider should know about

- ☐ Hospital stay
- ☐ Urgent care
- ☐ New health concern / diagnosis
- ☐ Procedure / surgery
- ☐ Emergency room
- ☐ Fall
- ☐ New specialist
- ☐ Change in daily function

Date / what happened / important details

Caregiver observations

Is there something you've noticed that the person receiving care may forget, minimize, or have difficulty explaining?

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3. Medication and health information

Doctor Appointment Prep Checklist

Person	Appointment date	Provider

Bring or attach an up-to-date medication list whenever possible. Use this page to flag recent changes, allergies or reactions, and information that may be useful for this specific appointment.

Recent medication changes to discuss

Medication	Started / stopped / changed	When?	Prescribed by	Question / concern

Known allergies / reactions

Medication / substance	Reaction	Notes

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Readings, other providers and records

Doctor Appointment Prep Checklist

Person _____ **Appointment date** _____ **Provider** _____

Home readings to share, if relevant

- ☐ Blood pressure
- ☐ Blood sugar
- ☐ Weight
- ☐ Temperature
- ☐ Oxygen level
- ☐ Other

Recent readings or trends worth discussing:

Other providers involved in care

Provider	Specialty	Anything today's provider should know?

Records / information to bring or confirm

- ☐ Current medication list
- ☐ Imaging / test results
- ☐ Specialist notes
- ☐ Home readings, if relevant
- ☐ Advance directive / healthcare proxy, if relevant
- ☐ Recent lab results
- ☐ Hospital or discharge paperwork
- ☐ Symptom log
- ☐ Insurance information, if needed
- ☐ Other

Reminder

This worksheet documents information to discuss. Start, stop, or change medications only according to instructions from the appropriate healthcare professional.

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4. Questions we want answered

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Use these prompts only if they fit the visit. Add your own questions below and put the most important ones first.

About changes
What could be contributing to this change? What should we watch for?

About medications
What is this medication for? Are any instructions changing?

About tests
What is being ordered? When and how will we receive results?

About ongoing care
Is a referral needed? When should we return?

My questions

1 _____

2 _____

3 _____

4 _____

5 _____

During the visit

What the provider said / important notes

_____

_____

_____

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During the visit: orders and referrals

Doctor Appointment Prep Checklist

Person	Appointment date	Provider

Medication changes discussed or prescribed

Medication	Change / instruction	When?	Notes

Tests / labs / imaging ordered

Test	Where / when	Preparation needed?	How will results be received?

Referrals

Referred to	Reason	Who schedules?

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5. After the appointment: close the loop

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Before the details fade, write down what needs to happen next and who will handle it. If anything is unclear, use the care team's preferred contact method to ask for clarification.

Before leaving the office

- ☐ Next steps are clear
- ☐ Test / lab instructions are clear
- ☐ Follow-up timing is clear
- ☐ We know whom to contact with questions
- ☐ Medication instructions are clear
- ☐ Referral plan is understood
- ☐ We know how results will be communicated

Our follow-up plan

What needs to happen?	Who is responsible?	Target date	Done
			☐
			☐
			☐
			☐
			☐

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After the appointment: notes to keep

Doctor Appointment Prep Checklist

Person _____ **Appointment date** _____ **Provider** _____

Follow-up appointment

Provider _____ **Date** _____

Time _____ **Purpose** _____

Questions that still need answers

Information to share with other caregivers / family / providers

Notes for the next appointment

You do not have to hold it all in your head

A written visit record makes it easier to remember what was discussed, share updates with others helping with care, and carry unfinished questions into the next appointment.

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

The Caregiving Concierge™ helps families keep appointments, medications, providers, documents, and schedules organized in one shared workspace.

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