

Doctor Visit Checklist  
(Complete Before Doctor Visit)

Doctor's Name \_\_\_\_\_ Phone Number \_\_\_\_\_

1. Call Doctor's Office (Get to Know the Office Staff):
  - a. Schedule Appointment (Write Down Date/Time) \_\_\_\_\_
  - b. Ask For Office Address (Write Down Location) \_\_\_\_\_
  - c. Ask For Paperwork (Have Forms Mailed To You Before Visit) \_\_\_\_\_
  - d. Ask For Special Instructions (Can You Eat Before Visit?) \_\_\_\_\_
2. Arrange Transportation \_\_\_\_\_
3. Ask Friend or Caregiver To Join You (Your Second Set of Ears) \_\_\_\_\_
4. Review Insurance Plan (What Does Your Plan Cover?) \_\_\_\_\_
5. Review Medications (Write Down If You Need Any Refills) \_\_\_\_\_
6. Prepare Changes to Discuss and Medical Concerns (Pages 2&3) \_\_\_\_\_
7. Pack for Doctor Visit:
  - a. Bring Insurance Card and Co-payment \_\_\_\_\_
  - b. Bring All Medications (Prescription and Non-Prescription) \_\_\_\_\_
  - c. Bring Paperwork (Completed Forms and Medical Records) \_\_\_\_\_
  - d. Bring Eye Glasses and Hearing Aids \_\_\_\_\_
  - e. Bring This Checklist (With Pages 2 &3 Completed) \_\_\_\_\_
  - f. Bring Water, Snack and Magazine \_\_\_\_\_
  - g. Wear Comfortable Warm Clothes (Bring Warm Socks) \_\_\_\_\_
  - h. Bring Your Patience (They are Helping Someone in Need) \_\_\_\_\_

## Changes to Discuss

### (Complete Before Doctor Visit)

Before the Doctor Visit it is a good idea to think about what you would like to talk about with the Doctor. Have there been any changes in your physical or emotional health since your last Doctor's Visit? Answer the following questions.

Diet, Medication and Lifestyle – Do you have any questions for the doctor about your medications? Are you noticing any problems with your medications, diet or appetite changes, alcohol or tobacco use?

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Health – Have you had any recent hospitalizations or emergencies? Are you noticing any problems with bone/joint pain or stiffness, bowel problems, chest pain, feeling dizzy, headaches, hearing changes, losing urine or feeling wet, shortness of breath, skin changes or vision changes?

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Thoughts and Feelings – Are you feeling sad, lonely or isolated? Are you noticing problems with intimacy or sexual activity, problems with memory or thinking, problems with sleep or changes in sleeping patterns?

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Everyday Living – Have you had any recent accidents, injuries, or falls? Do you have any problems with exercise? Are you having problems performing daily activities? Do you have problems with mobility? Do you have any problems with your living situation? Do you want to learn about advance directives?

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Medical Concerns

(Complete Before and During Doctor's Visit)

Before the Doctor Visit review the Changes to Discuss Page. List the three Most Important Medical Concerns you would like to discuss with the Doctor below.

Concern #1

Write Down (Before Doctor's Visit) – Your First Most Important Medical Concern

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Write Down (During Doctor's Visit) – Doctor's Diagnosis and Treatment Plan

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Concern #2

Write Down (Before Doctor's Visit) – Your Second Most Important Medical Concern

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Write Down (During Doctor's Visit) – Doctor's Diagnosis and Treatment Plan

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Concern #3

Write Down (Before Doctor's Visit) – Your Third Most Important Medical Concern

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Write Down (During Doctor's Visit) – Doctor's Diagnosis and Treatment Plan

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Communication  
(During Doctor's Visit)

During the Doctor's Visit –

1. Tell the Doctor Your Medical Concerns
2. Answer the Doctor's Questions
3. Ask the Doctor for the Diagnosis and Treatment Plan
4. Repeat Back To The Doctor What You Heard
5. Write it down on the Medical Concerns Page
6. Are You Not Comfortable with The Doctor's Diagnosis and Treatment Plan?

Use The Following Phrases:

- a. I Do Not Understand? Could You Explain It To Me Again?
- b. What Else Could It Be? Is There Anything In My History That Would Contribute To This?
- c. Do I Have Other Options? Are There Other Medications or Tests That Can Be Performed?
- d. How Will The New Medication Interact With My Current Medications?

Before You Leave the Doctor's Office –

1. Ask The Doctor - What Is The Follow-up Plan?

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2. Ask The Doctor - Who To Call With Questions?

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3. Write Down Next Appointment (Date/Time)