

Doctor Appointment Prep Sheet

Walk in with your priorities. Walk out with answers, orders, and next steps in writing.

NAME / PERSON THIS SHEET IS FOR

VISIT DATE AND TIME

PROVIDER / CLINIC

REASON FOR THIS VISIT

Visit type: ☐ In person ☐ Video or phone ☐ Follow-up after a hospital stay ☐ New provider

1 My top three concerns, most important first

1

2

3

Put the most important concern first, and raise it at the start of the visit, not as you are leaving.¹

2 What has changed since my last visit

NEW OR WORSE SYMPTOMS

MEDICINE CHANGES: NEW, STOPPED, OR NEW DOSE, AND WHO CHANGED IT

OTHER DOCTORS, URGENT CARE, ER, OR HOSPITAL STAYS

TESTS OR RESULTS DONE SOMEWHERE ELSE

FALLS, SLEEP, MOOD, APPETITE, OR WEIGHT CHANGES

INSURANCE, PHARMACY, OR CAREGIVER CHANGES

3 My main symptom, in detail

WHAT IT IS AND WHERE

WHEN IT STARTED

HOW OFTEN / HOW LONG IT LASTS

PAIN NOW (0–10)

AT ITS WORST (0–10)

AT ITS BEST (0–10)

WHAT MAKES IT BETTER OR WORSE

Pain scale: 0 = no pain, 10 = the worst pain I can imagine.

WHAT IT STOPS ME DOING (SLEEP, STAIRS, WORK, DRIVING, CARING FOR SOMEONE, GETTING DRESSED)

A number says how much it hurts. What it stops you doing shows how much it matters. Be specific: “I can’t climb the stairs to my bedroom” gives your team something to act on.

4 Before I go

- ☐ My dated medicine list, including vitamins and supplements. The free SynquUp™ Medication List works.¹
- ☐ Results, reports, or discharge papers from other providers.¹
- ☐ An interpreter, or help with hearing, vision, or mobility, requested ahead of time.¹

- ☐ Insurance card and photo ID. A referral or approval, if my plan needs one for this visit.
- ☐ A trusted person to come along or join by phone, to listen and take notes.¹
- ☐ Video visit: device charged, link tested, a quiet spot, and my list in front of me.

RIDE: PERSON OR SERVICE / PHONE / PICKUP TIME

TRU-TIP • Say the plan back before you leave

Before the visit ends, repeat the plan in your own words: “So I will...” Doctors use this “teach-back” check to catch mix-ups. You can use it too, while the doctor is still in the room.⁴

5 My questions, and the answers

My question	Answer (in my words, or the words I was given)

6 Decisions made, and what was ordered

Decision or order (test, medicine, referral, therapy, equipment)	Where and when	Needs insurance approval? Who sends it

7 Next steps: who owns each one

Next step	Who owns it (me, clinic, pharmacy, insurer)	By when

8 Referrals

A referral sent is not a referral received. If I have not heard within 3 business days, I call.

Referred to (specialist or service)	Phone	Date I called / who I spoke with	Appointment date

TRU-TIP • Get a name, date, and reference number

For every call about a referral, approval, or bill, write down the person's name, the date, and a reference number. "Someone in billing said it was fine" cannot be followed up; a name and a number can.²

9 After the visit

IF I HAVE NOT HEARD ABOUT RESULTS BY (DATE), I CALL: NAME / PHONE

TRU-TIP • Read your notes within a day or two

Visit notes and results usually show up in the patient portal within about 24 hours, and lab results are often there the same day. Read them, and check that your medicines and the plan match what you heard. If something is wrong, you have the right to ask for a correction.^{2,3}

Want to go further? The SynquUp™ Emergency Life Binder, and the Appointment Log & Question Tracker in the Oncology Emergency Life Binder, by Chuck Kinney, keep every visit, answer, and follow-up in one place. Free tools: chuckkinney.com/free