

New Diagnosis Checklist

For any serious new diagnosis. Get clear on what is known, who is in charge, and what comes next.

NAME	DATE OF DIAGNOSIS VISIT	DOCTOR WHO EXPLAINED IT

1 My diagnosis, as it was explained to me

This diagnosis is: ☐ Confirmed ☐ Still being checked ☐ Not sure. I asked again.

TESTS OR RESULTS STILL PENDING

WHO WILL TELL ME, AND BY WHEN

- | | |
|--|--|
| ☐ I asked what the diagnosis means for me, in plain words. ¹ | ☐ I asked what is confirmed and what is still uncertain. ¹ |
| ☐ I asked how soon a decision or treatment is needed. | ☐ I asked what my options are, including watching and waiting. ¹ |
| ☐ I reviewed my medicines, supplements, and allergies with the team. | ☐ I know which symptoms mean call the team, and which mean call 911. |

2 Who is coordinating my care? Get a name

CARE COORDINATOR / NAVIGATOR: NAME AND ROLE

PHONE / BEST WAY TO REACH

TRU-TIP • “The office” is not a name

Your doctor makes the medical decisions. But scheduling, referrals, insurance approvals, and passing results between specialists often have no single owner. Ask: “Who is coordinating my care, and how do I reach them?” Write down one person's name. Departments do not fix things; people do.⁷

3 Before treatment starts

- | | |
|---|---|
| ☐ If I am starting cancer treatment, I asked whether I need a dental check first. ^{5,7} | ☐ I asked how treatment could affect fertility, work, and driving, and what to do first. |
| ☐ I asked who to call after hours, and wrote it below. | |

4 Records to request: request it, track it, file it

You have a right to copies of your health records. Ask for the written report, not just “it was normal.” Most results also post in your patient portal.^{2,8}

Document	Date requested	Date received	Where I keep it	Filed
Pathology report biopsy and surgery				☐
Imaging reports CT, MRI, PET, ultrasound, X-ray				☐
Lab results				☐
Genetic or genomic test reports tumor or inherited				☐
Operative or procedure notes				☐
Visit notes from the diagnosis visit				☐
				☐

TRU-TIP • Read your notes in the portal

After each visit, check your patient portal. The doctor's note often posts within a day or so. Read it. It is the written record of your plan, and you can ask for a correction if something is wrong. Download new reports and file them the same day.⁷

TRU-TIP • For cancer: ask about trials before the first treatment

Many clinical trials enroll only people who have not started treatment yet. Once standard treatment begins, that door can close. Ask at the first planning visit, not after a few cycles.^{6,7}

Second opinions, work, and next steps

5 Second opinion steps

- ☐ I asked my doctor if a second opinion makes sense. Asking is normal.
 ☐ I called my insurance to check coverage and whether a referral is needed.¹
- ☐ I asked whether waiting for a second opinion is safe, or if timing matters.
 ☐ I had my records, reports, and images (on disc or link) sent, and confirmed they arrived.¹
- ☐ For cancer: I asked whether a clinical trial fits me **before** starting treatment.^{6,7}
☐ I wrote down where the two opinions agree and where they differ.

6 Work protections to ask HR about

Rules depend on your employer, how long you have worked there, and your state. Ask HR or your benefits office about each one.

- ☐ **FMLA leave:** up to 12 weeks of unpaid, job-protected leave a year if you qualify. It can be taken in pieces (intermittent) or as a shorter schedule when medically needed, such as for treatment days.³
☐ **Short-term disability:** do I have coverage through work, or a state program? How do I apply, and what does my doctor need to fill out?
- ☐ **ADA accommodations:** changes like time off for treatment, a different schedule, breaks, or working from home. Employers with 15 or more workers are covered; you can ask without special wording.⁴
☐ **Paid time off:** how my sick leave and vacation work with FMLA, and whether a caregiver can take leave too.³

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

Every time you call insurance, HR, or a clinic, write down who you spoke with, the date and time, what they said, and any reference number. If the answer changes later, you have a record to point to.⁷

7 My care team

Role (doctor, nurse, coordinator...)	Name	Phone	Fax / portal / notes

8 Next steps

What needs to happen	Who owns it (a name)	By when	Done
			☐
			☐
			☐
			☐
			☐
			☐

Want to go further? The SynquUp™ Emergency Life Binder and the Oncology Emergency Life Binder's Care Team and Medical Records Log, by Chuck Kinney, keep every contact, report, and next step in one place. Free tools: chuckkinney.com/free