

# DOCTOR VISIT CHECKLIST

If you struggle getting the information you need at your doctor's visits, consider using a checklist\* such as the one below. See next page for more information/detail.

Date: \_\_\_\_\_

Doctor's Name: \_\_\_\_\_

Appointment Location: \_\_\_\_\_

Business card on file?

Yes

No

Reason for visit:

Annual check-in

Pain management concerns

Medication(s) questions/concerns

Treatment options

Need a referral

Mental health concerns

Other \_\_\_\_\_

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\* Don't like paper checklists? Consider using an app like Doctor Visit Notes or PatientPilot to capture all of the information listed above.

Stuff to bring to appointment:

- Recovery goal/list of activities from the toolkit
- Pain logs
- List of medications you are currently taking
- Insurance card

How will you capture info at this appointment?

- Bringing along someone?
- Make an audio recording?
- Take paper notes?

Changes since last visit: \_\_\_\_\_

\_\_\_\_\_

New questions/concerns: \_\_\_\_\_

\_\_\_\_\_

Primary objective today: \_\_\_\_\_

\_\_\_\_\_

Notes from your visit: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# ABOUT THE CHECKLIST

- **Business cards:** I highly recommend snagging a business card for each of your doctors and writing notes about the provider on the back. (Were they nice? Did they help you? Would you see them again?) These cards can come in handy during emergencies when accessing a computer is difficult or when you need to delegate scheduling visits to someone else.
- **Meds list:** Yes, in a magical world all of this info would be in your digital medical records which all doctors should be able to access wherever you go. However, we both know that's not usually how it goes. Therefore, it's important for *you* to keep a master list of all of the substances you regularly take and bring this list to all of your appointments. Ideally, your on-line patient portal for your insurance should have a list you can copy or print out to get started. Otherwise you may need to start a written or typed list.
- **Changes:** Point out anything new that might be helpful for your doctor to know, like if you've recently gone through any big life changes, have new injuries, are on new medications, or are seeing new health care providers, both conventional *and* complementary.
- **Primary objective:** What is the *one* thing you *must* get out of this appointment today? For example, a primary objective could be, "Do not leave this office without getting a referral to a pain management specialist." Keep this objective in your mind during your visit and make sure it gets covered before you leave.
- **Capture:** When you're in pain, your ability to concentrate is compromised, so you may want to consider having

some sort of back up plan for capturing all of the information shared at your appointment. This could be making a recording of the appointment, bringing along someone else to get their perspective, or simply taking notes with a pen and paper.