

MEDICAL VISIT CHECKLIST

To get the most out of your medical appointments, be prepared! Use this checklist to stay focused and organized. Take notes during your appointment (you can use this sheet) and bring along a support person if you can.

Call Your Insurance Company

If you are seeing a new provider or specialist, call your insurance company to see if you need a referral or pre-approval for the visit.

List 3 Questions or Concerns You Want to Discuss

Describe Your Current Symptoms

Bring These With You

- Relevant medical records, test results, Xrays, scans, reports from other providers
- Updated health summary and medication list (you can print a free template at www.prudentpatient.com)
- Your insurance cards
- A support person

If You Get a New Diagnosis Ask:

- How certain are you?
- What else could this be?
- Is there anything in my history that has contributed to this?
- How is this treated?

Repeat Back

Repeat back what you've heard. Get clarification if there's something you don't understand.

Next Appointment:
