

Appointment Preparation & Follow-Up Pack

A practical set of worksheets for preparing, taking useful notes, and following through after a healthcare visit.

Appointments are easier to use well when the important information is gathered before the visit and the next steps are captured before they are forgotten. Use the whole pack or print only the pages you need.

HOW TO USE THIS PACK

- ☐ Before the visit: write down what has changed and choose the questions or concerns that matter most.
- ☐ Bring an up-to-date medication list and any records, instructions, forms, or test information the healthcare office may need.
- ☐ During the visit: use the notes pages to capture explanations, decisions, changes, and instructions.
- ☐ Before leaving: make sure you understand what happens next, who is responsible, and when results or follow-up should occur.
- ☐ After the visit: transfer tasks to the Follow-Up Action Plan and keep track until each item is completed.

A SIMPLE RULE

You do not need to record every word. Capture what changed, what was decided, what you need to do, and anything you still do not understand.

USE THE PAGES THAT FIT THE VISIT

A routine checkup may need only the preparation, questions, notes, and follow-up pages. A specialist visit may also need the tests/referrals page. Reprint individual pages whenever you need them.

Bring support when it would help

A trusted family member, friend, or caregiver can help take notes or remember questions. Decide beforehand what role you want that person to have.

Preparing for My Appointment

Use this page before the visit. Start with the most important reason for the appointment so it does not get lost among smaller questions.

Appointment date / time / healthcare professional:

Main reason for this appointment:

WHAT HAS CHANGED SINCE MY LAST VISIT?

- ☐ New or worsening symptoms
- ☐ Medication, treatment, or therapy changes
- ☐ Emergency room, urgent care, hospital, or specialist visit
- ☐ Changes in sleep, appetite, energy, mobility, mood, memory, or daily activities
- ☐ A new problem affecting my ability to follow the current care plan

The change I most need to discuss:

WHAT I NEED TO BRING OR ARRANGE

- ☐ Current medication and supplement list
- ☐ Relevant records, forms, instructions, test information, or home readings
- ☐ Insurance / identification information if needed
- ☐ Glasses, hearing aids, mobility equipment, or other aids I use
- ☐ Transportation or assistance
- ☐ Support person, interpreter, or other communication help if needed

Anything else I need to bring or arrange:

My Priority Questions & Concerns

Choose the questions that matter most. If time is limited, begin with the first three rather than waiting until the end of the visit.

Priority	My question or concern	Answer / next step

IF A NEW TEST, TREATMENT, OR MEDICINE IS DISCUSSED

Useful questions may include: Why is it being recommended? What should I expect? What do I need to do to prepare or use it correctly? What should I watch for? When and how will we know whether it is helping?

WHAT I WANT TO UNDERSTAND BEFORE I LEAVE

- ☐ What the healthcare professional thinks is happening
- ☐ What is changing in my care plan
- ☐ What I should do next
- ☐ What should prompt me to call or seek further care
- ☐ When and how I will receive results or follow-up information

Appointment Notes

Date / healthcare professional:

Purpose of visit:

WHAT WE DISCUSSED

NEW INSTRUCTIONS OR RECOMMENDATIONS

CHANGES TO MEDICATIONS, TREATMENT, ACTIVITY, OR RESTRICTIONS

WHAT I WANT CLARIFIED BEFORE I LEAVE

What Changed? What Happens Next?

Use this page before leaving the office or immediately afterward. It turns the visit into a clear plan instead of a collection of notes.

Area	What changed / what I was told

MY NEXT STEP IN PLAIN LANGUAGE

What I am supposed to do next:

When I should do it:

Who I should contact if I have a question or problem:

ONE LAST CHECK

If any instruction is unclear, ask the healthcare professional or staff to explain it again. It is reasonable to repeat the plan back in your own words to make sure you understood it correctly.

Tests, Imaging, Procedures & Referrals

Track what was ordered or recommended, how it gets scheduled, and how you will receive the result or next step.

Test / procedure / referral	Why / preparation / instructions	Date / location / status

RESULTS & FOLLOW-UP

How and when I should expect results:

Who will explain the results:

What I should do if I have not heard back:

Copy of results requested or received:

Follow-Up Action Plan

After the appointment, list each unfinished task. A plan is easier to follow when every item has an owner and a next step.

Follow-up task	Who handles it?	Due / expected	Done

COMMON FOLLOW-UP TASKS

- ☐ Schedule another appointment
- ☐ Arrange a test, imaging study, procedure, therapy, or referral
- ☐ Pick up or clarify a medication
- ☐ Send records or information to another healthcare professional
- ☐ Update the person helping with my care
- ☐ Follow up on a result that has not arrived

Question I still need answered:

Upcoming Appointments & Healthcare Contacts

Keep the appointments and contact information you use most often in one place. Reprint this page as your care team or schedule changes.

UPCOMING APPOINTMENTS

Date / time	Healthcare professional / purpose	Location / phone

HEALTHCARE CONTACTS

Name / role or specialty	Office / phone / portal or contact

NOTES
