

# Caregiver's Checklist for Doctor's Office Visit

As a caregiver, there are many competing priorities between meal preparation, handling finances, basic grooming and care, and managing dental and medical appointments for yourself and your loved ones, which can be the source of much anxiety and stress.

Whether the appointments are for you or a care recipient, consider the following checklist to assist you in managing these appointments to remain on task and organized within the larger caregiving role.

## **Prior to the Visit:**

- Identify concerns and document symptoms
- In the case of a care recipient's appointment, discuss the intent of the visit the day of the visit, including preparing the care recipient for possible testing.
- Compile questions
- Confirm the appointment and arrival time
- Update the medication list and include any over-the-counter and herb supplements
- Bring insurance cards and picture identification required by many physicians offices on a regular basis

## **During the Visit:**

- Assist the care recipient with reporting issues, describing symptoms accurately from your perspective, providing additional information to assist the medical professional with a diagnosis
- Record recommendations or request something in writing
- Ask questions and seek clarification on instructions
- Verify any follow-up diagnostics or appointments that are needed
- If any diagnostic testing is done the day of the visit, ask when test results will be available and record those dates for follow-up

## **Following the Visit:**

- Review any notes you recorded during the meeting
- Discuss the visit with the care recipient to ensure understanding of diagnosis, prognosis, and/or expectations
- Note any additional appointments on calendars and planners as appropriate
- Remove any medications no longer needed from the medication supply
- Add any new medications as directed to the medication supply
- Make any changes to the medication list
- Call for any test results if you have not heard
- Call to clarify any additional issues or concerns
- Follow-up with the office if appropriate to update them on you or your care recipient's condition (positive or negative)

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