

SWH Legacy Consultants LLC

Medical Appointment Preparation Checklist

Client Name: _____

Provider: _____

Specialty: _____

Appointment Date: _____

Appointment Time: _____

Location/Virtual Link: _____

Before Your Appointment

- ☐ Confirm appointment date and time
 - ☐ Verify office location or virtual login instructions
 - ☐ Arrange transportation if needed
 - ☐ Bring insurance card(s)
 - ☐ Bring photo ID
 - ☐ Bring payment method for co-pay (if applicable)
 - ☐ Bring updated medication list
 - ☐ Bring copies of recent test results (if requested)
 - ☐ Bring referral or authorization (if required)
 - ☐ Bring notebook or use phone for notes
 - ☐ Bring assistive devices (glasses, hearing aids, walker, etc.)
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Current Concerns

List your top concerns (prioritize your most important issues).

1. _____
2. _____
3. _____
4. _____
5. _____

Symptoms Tracker

Symptom: _____

Started: _____

Frequency: _____

Severity (1–10): _____

Makes it better: _____

Makes it worse: _____

Additional Notes:

Current Medications

☐ Medication list updated

Include:

- Medication Name
- Dose
- Frequency
- Reason for taking

Questions for My Provider

- ☐ What is my diagnosis?
- ☐ What additional testing is needed?
- ☐ What treatment options are available?
- ☐ What are the benefits and risks?
- ☐ What side effects should I watch for?
- ☐ Should any medications be changed?
- ☐ Are there lifestyle changes I should make?
- ☐ When should I follow up?
- ☐ When should I seek emergency care?

Additional Questions:

Tests or Procedures

- ☐ Blood work
- ☐ Imaging
- ☐ Biopsy
- ☐ Other:

Preparation Instructions:

Follow-Up Plan

Next appointment:

Referrals:

Lab work ordered:

Medication changes:

Home instructions:

Notes During Appointment

After the Appointment

☐ Schedule follow-up appointment

☐ Pick up medications

☐ Complete ordered testing

☐ Review visit summary

☐ Update medical binder

☐ Contact provider with questions if needed

☐ Share important updates with caregivers (if applicable)

SWH Legacy Consultants LLC

Your Partner in Healthcare Organization & Advocacy

Services Include:

- Appointment Coordination & Preparation
- Medical Binder Organization
- Medical Record Management
- Care Coordination

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