



Please fill this PDF – 9 Steps Checklist

First Name

Phone Number

Middle Name

DOB

Last Name

Date

Nine Steps To A More Effective Visit With Your Doctor

These nine steps should help make your next visit with your doctor more effective and efficient. By bringing this nine-point checklist with completed information to your next doctor's visit, you will be ensured that your time at your visit will be well-spent.

Bring these (9) items for a more effective visit with your doctor.

- ☐ 1. Insurance card and a Photo ID. Inform staff of changes in address and phone numbers.
- ☐ 2. Did you visit another hospital or clinic since your last visit with us? Please provide the hospital's name, doctor's name, phone numbers, treatment provided and date of treatment by other healthcare providers or health care facilities. This includes urgent care centers and emergency rooms where you have been treated since your last visit.

- ☐ 3. List of tests done since your last visit, including the name of the facilities where testing occurred and dates of tests. Be reminded to bring test results with you to your appointment.

- ☐ 4. List of all current medications. This includes prescription drugs, over-the-counter medicine and vitamins. List each medicine, dosage, and number of times you take the medicine each day. Include any allergies to medications, food, or other products.

- ☐ 5. List describing side effects of newly prescribed medications. For example: nausea, dizziness or constipation.

- ☐ 6. Describe your primary problem. You can describe the primary reason you want to be seen by the doctor. This can include when the problem started, how often it occurs, what makes it better or worse, and if there is pain, describe the pain and what causes it. (describe in one sentence)

- ☐ 7. Inform the receptionist about multiple problems. If there is multiple problems for consultation, this will allow the staff to schedule a longer appointment for your visit. Otherwise, if you make an appointment for one problem and you want to discuss several problems, the office might ask that you arrange a follow-up for additional concerns. (describe in two sentences)

- ☐ 8. A concise list of questions. This will increase the likelihood that you receive answers to your concerns in a timely manner. It'll be difficult to return to your examination room once the doctor started examining another patient. General or routine questions can be answered by the staff while waiting on the doctor.

- ☐ 9. Pen and paper. This will allow you to make a note on any advice or information the doctor gives you. This will also allow you to read your condition on your doctor's website.

Signature



Please print out and bring to the office for your appointment