

Preparing for a medical appointment

A two-page checklist for older adults and caregivers

Use this guide to prepare what to bring and what you want to discuss.

Date:

Time:

Clinician or clinic:

Reason for visit:

CHECK FIRST

Follow clinic instructions. Ask before stopping or changing a medicine.

Before the appointment

- ☐ I wrote down the concern or change I most want to discuss.
- ☐ I prepared a current list of medicines, vitamins and supplements, including how I take them.
- ☐ I gathered any records, readings or instructions the clinic asked me to bring.
- ☐ I arranged any support I want, such as a care partner, interpreter or accessibility help.

A care partner can help with notes or questions while supporting the older adult's choices.

What I want to share

My main concern or goal

Changes since my last appointment

Symptoms, medicines, allergies, mood, memory or function

Author and clinical reviewer: Anuolu Bank-Oni, PharmD, CDE, BCGP

General information for a healthcare conversation. It does not replace advice from your healthcare professional. Instructions can vary.

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Questions and next steps

Use this page during the appointment and check the plan before you leave.

Questions I may want to ask

- ☐ What do you think is causing my concern?
- ☐ What choices do I have? What are the likely benefits and downsides?
- ☐ Do I need a test or a medicine change? What should I expect?
- ☐ What should I do next? Can I have the plan in writing?
- ☐ How and when will I receive results? Who should I contact with questions?
- ☐ What changes mean I should contact the clinic or get help sooner?

Before I leave

- ☐ I understand the plan and can explain it in my own words.
- ☐ I know what to do with each medicine, including any changes.
- ☐ I know how and when I will receive results or follow-up.
- ☐ I know who to contact and what changes mean I should get help sooner.

My next step

What I will do next

By when:

Who to contact:

Question I still have:

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Sources: AHRQ. Questions Are the Answer. Accessed August 2026.
NIA. Medical Care and Appointments. Accessed August 2026.

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