

Appointment preparation checklist



We understand that oncology appointments can feel worrying and overwhelming, especially when there's a lot to remember and discuss. This appointment checklist is designed to help you feel prepared, stay focused on what matters most to you, and leave with clear next steps.

How to use this checklist?

This appointment checklist is designed to help you feel prepared, stay focused, and leave with clear next steps. Before your visit, use it to confirm logistics, gather key medical information and test results, check any coverage requirements, arrange support if needed, and write down your top priorities and questions.

During the appointment, use the checklist to guide the conversation, capture answers, decisions, and safety advice, and note any orders, referrals, or follow-up plans. After the visit, review what you've written, list your action items with dates and responsibilities, and record who to contact with questions. Keep the checklist updated between visits and share it with your care team to help everyone stay coordinated.

Important disclaimer

This checklist is for personal tracking and self-management support only and does not constitute medical advice or replace guidance from your medical team. If you are in any doubt, or if symptoms change or worsen, contact your medical team or local emergency services immediately.

How do I prepare myself?

3–5 days before (or as soon as you book)

Confirm appointment details: date, time, location, parking/entrance.

If laboratory or visual imaging tests were ordered in advance of the meeting with the medical team, check how long the results will take to book your appointment accordingly.

Check coverage: confirm the provider/facility is in network; check pre-authorization status if needed.

Send records: ask the clinic if they need prior reports, imaging, or pathology in advance; upload or bring copies.

Ask about prep: fasting, meds to hold, contrast allergy steps, transport needs, or arrival time.

Arrange support: invite a support person to come along or join by phone/video; request an interpreter if needed.

Set goals: write your top 2–3 priorities/questions for this visit.

The day before

Complete any labs or forms requested; bring test results if done elsewhere.

Re-check instructions (fasting, hydration, bladder fill, meds to take/hold).

Pack your bag (see below); charge your phone and bring a charger.

Confirm transport, childcare, or work coverage.

What do I need to bring?

Bring these to every appointment

Identification and insurance: photo ID, insurance card/policy number, referral letter (if required), pre-authorization approval (if issued).

Medical information: diagnosis summary, staging (if known), recent clinic notes, pathology reports, imaging (CD/USB or portal links), vaccination record.

Medication list: all prescriptions, over-the-counter meds, supplements; include doses and schedules.

Allergies: drug/contrast/food allergies and reactions.

Symptom log: your symptom/side-effect tracker and temperature log (if relevant).

Questions list and notebook/pen (or phone notes/voice recorder, if allowed).

Comfort and practical: water, a snack (if allowed), warm layer, lip balm, headphones, payment method.

If you're having an infusion or radiation session

- Wear comfortable, easy-to-roll-up sleeves; bring a warm layer.
- Port/line info card; numbing cream applied at the time advised by your team.
- Prescribed anti-nausea or pain medicines (confirm if you should take them beforehand).
- Entertainment for waiting/infusion time.

If you're having imaging (CT/MRI/PET)

- Bring prior imaging on CD/USB or ensure the facility can access them.
- Follow fasting/contrast instructions; disclose contrast allergies.
- Remove metal/jewelry (for MRI); bring recent kidney function labs if requested.
- Arrange a driver if you expect sedation.

What to ask?

About my diagnosis and tests

- What type and stage is my cancer, and what does that mean for me?
- Do I need any additional tests (biomarkers, imaging) before deciding the plan?

About treatment options and goals

- What are my options and the goal of each (cure, control, symptom relief)?
- Why are you recommending this option now, and what is the expected timeline?

Side effects and safety

- What side effects are most likely and how can we prevent/manage them?
- What symptoms should prompt me to call the clinic versus go to emergency care?

Logistics and scheduling

- What needs pre-authorization and how long will approval take?
- How often will I need visits, scans, or labs, and can any be done locally/virtually?

Costs and coverage

- Is this provider/facility in network? What costs should I expect?
- Are there lower-cost but equally effective options (e.g., alternatives, home administration)?

Fertility, genetics, and trials

- Should I consider fertility preservation now?
- Do genetic or biomarker results change my options?
- Are there clinical trials I should consider at this stage?

Daily life and work

- Can I keep working/exercising? What adjustments do you recommend?
- What vaccines, infection-prevention steps, or diet changes should I follow?

Follow-up and contact

- How will we measure if treatment is working and when will we review?
- Who do I contact for questions after hours, and how quickly will I hear back?

After the appointment: write down what's next

Tests/orders placed
(with dates and locations)

Pre-authorizations needed
(who is submitting,
expected timeline)

New/changed medications
(dose, schedule, start date,
refills, pharmacy)

Referrals
(specialists, dietitian,
mental health,
physiotherapy, palliative/
supportive care)

Next appointment date/
time and how to prepare

Who to contact with
questions and the best
number/portal
