

Appointment preparation checklist

We understand that doctor 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 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.

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
