

Appointment Checklist

A few days before

- ☐ Confirm the date, time, and full address, including building, floor, or suite
- ☐ Ask the office about parking, the entrance to use, and how early to arrive
- ☐ Arrange a ride and write down the driver's name, phone number, and a backup
- ☐ Ask the person whether they want someone to come in with them or wait outside
- ☐ Write down questions, most important first
- ☐ Gather items such as photo ID, insurance card, and any forms the office sent
- ☐ If the provider asked for a list of current medicines, prepare it as they requested
- ☐ Note the office phone number in case you are running late

The day before

- ☐ Confirm the ride and pickup time with the driver
- ☐ Put ID, cards, forms, and the question list in one bag or folder by the door
- ☐ Charge the phone and pack a charger if the wait may be long
- ☐ Check the weather and set out clothes and shoes
- ☐ Pack a water bottle and a snack if the person wants them
- ☐ Plan the wake-up time backward from the pickup time

On the day

- ☐ Leave with extra time for traffic, parking, and check-in
- ☐ Bring the bag or folder, glasses, and hearing aids if the person uses them
- ☐ Bring something to read or do while waiting
- ☐ Agree on your role: notes, a specific question, or waiting outside
- ☐ Ask the person's questions from the list before leaving
- ☐ Ask the front desk for any reminder card or paperwork for the next step

Afterward

- ☐ Write the next appointment date on the household calendar
- ☐ Schedule or confirm a ride for the next appointment
- ☐ Share logistics with family (dates, rides) as the person wishes
- ☐ Keep private notes in a place the person chooses, not on a shared board
- ☐ File any paperwork in the person's appointment folder
- ☐ Return borrowed items and put the bag back where it lives

General information only, not medical, legal, financial, or professional safety advice. In an emergency, call 911.