

# Caregiver Appointment Checklist

Support the person. Share useful observations. Agree on next steps.

Person attending: \_\_\_\_\_ Visit date/time: \_\_\_\_\_

Caregiver / relationship: \_\_\_\_\_ Provider: \_\_\_\_\_

## 1 PREPARE TOGETHER

- ☐ Ask what matters most to the person and what support they want from you.
- ☐ Confirm permission to participate; ask the office about any required forms.
- ☐ Arrange transportation, mobility assistance, or an interpreter if needed.
- ☐ Gather medications, supplements, allergies, relevant records, and home readings.
- ☐ Note changes in symptoms, daily activities, memory, mood, or care needs.

### Their priorities / questions:

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## 2 DURING THE APPOINTMENT

- ☐ Let the person speak for themselves as much as they wish and are able.
- ☐ Share specific observations, including what changed and when.
- ☐ Take notes on explanations and instructions, with their agreement.
- ☐ Discuss practical barriers to the plan, such as cost, transport, or help at home.

## 3 BEFORE LEAVING / AFTER THE VISIT

- ☐ Confirm the plan and clarify medication instructions with the healthcare team.
- ☐ Ask how results will arrive, who to contact, and when followup is needed.
- ☐ Ask which symptoms need prompt attention and what action to take.
- ☐ Agree together on who will handle each task; share notes with permission.

Task: \_\_\_\_\_ Who: \_\_\_\_\_ By when: \_\_\_\_\_

Task: \_\_\_\_\_ Who: \_\_\_\_\_ By when: \_\_\_\_\_

Questions / results contact: \_\_\_\_\_

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