

Larkspur Family Health, PLLC

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VISIT PREPARATION

Document
Annual visit preparation checklist
Owner
Dr. Whitfield
Version
4.5 · Effective 02/2027
Visit length
40 minutes

Preparing for Your Annual Visit

Forty minutes goes quickly. Twenty minutes of preparation roughly doubles what we can cover.

PATIENT	APPOINTMENT DATE	COMPLETE THIS BY The day before	BRING This sheet and your medicine bottles
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PART 1 — YOUR TOP THREE CONCERNS, IN YOUR OWN WORDS

Write these down before you arrive. Almost everyone remembers their most important question in the parking lot afterward. Ranking them means the most important one is never the one we run out of time for.

RANK	WHAT IS BOTHERING YOU OR WHAT YOU WANT TO DISCUSS	HOW LONG HAS IT BEEN GOING ON?	WHAT YOU HAVE ALREADY TRIED
1			
2			
3			

If there are more than three, we will address the top ones and schedule a follow-up for the rest rather than rushing all of them.

PART 2 — NUMBERS TO BRING

☐ Home blood pressure readings, if you track them — the log, not an average from memory

☐ Home blood glucose readings or a continuous monitor summary

☐ Your weight trend, if you have been tracking it

☐ Steps or activity, if you use a tracker

☐ Sleep hours on a typical night

☐ Results from any test done outside this office in the past year

☐ Reports from any specialist you saw since your last annual visit

Bring the actual data if you have it. A pattern over weeks is far more useful than a single reading in the office.

PART 3 — MEDICINES AND ALLERGIES

☐ Every container, including prescriptions from other clinicians

☐ Over-the-counter medicines you take regularly

☐ Vitamins, minerals, and herbal supplements

☐ Creams, patches, eye drops, inhalers, and injectables

☐ Anything you were prescribed but are not actually taking — please tell us, we will not be annoyed

☐ Any reaction you have had to a medicine, and what the reaction was

PART 4 — UPDATES SINCE LAST YEAR

TOPIC	ANYTHING NEW?	DETAILS
Hospital stays, emergency visits, or urgent care visits	Yes / No	
New diagnoses made by another clinician	Yes / No	
Surgeries or procedures	Yes / No	
New conditions in your parents, siblings, or children	Yes / No	
Changes in work, housing, relationships, or caregiving	Yes / No	
Changes in alcohol, tobacco, nicotine, or other substance use	Yes / No	
Falls, or near-falls	Yes / No	
Changes in mood, stress, anxiety, or sleep	Yes / No	
Changes in memory or thinking, noticed by you or by someone else	Yes / No	
Difficulty affording food, medicine, transportation, or utilities	Yes / No	

The last few questions are asked of everyone. They are part of a complete picture of your health, not a judgment about you.

PART 5 — WHAT WE WILL REVIEW TOGETHER

- Your blood pressure, weight, and other measurements, compared with last year
- Which screening tests are due, based on your age, sex, history, and family history
- Which immunizations are due
- Each of your medicines: is it still needed, still working, still the right dose
- Mood, sleep, stress, alcohol, and tobacco
- Your top three concerns from Part 1
- Whether any advance-care documents should be created or updated
- One or two things worth changing before next year, chosen by you

PART 6 — A NOTE ON BILLING

This is worth understanding before the visit rather than after the bill.

- A preventive or wellness visit is covered differently by most plans than a visit for a specific problem.
- If we address a new or ongoing problem during a preventive visit, your plan may process part of the visit as a problem visit, which can create a copay or a balance.
- This is determined by your plan, not by this office.
- If you would prefer to keep them separate, tell us and we will schedule a second visit for the problem.
- Ask the office manager at 555-0170 option 4 before the visit if you want to understand your specific coverage.

Finally: Bring this completed sheet with you. We will scan it into your chart so nothing you wrote down gets lost.

FICTIONAL SPECIMEN. Larkspur Family Health and this checklist are invented for demonstration only. The screening and billing descriptions are general educational illustrations, not medical advice, coverage determinations, or a real practice document.