

Patient Preparation Worksheet

PATIENT PREPARATION WORKSHEET

Preparing for Your Doctor Appointment

PURPOSE

This worksheet helps you prepare for medical appointments by organizing your information, symptoms, questions, and concerns. Bringing this completed worksheet to your appointment helps you communicate effectively with your physician.

Preparation leads to better appointments. Better appointments lead to better care.

BASIC INFORMATION

Date of Appointment: _____

Doctor/Provider Name: _____

Reason for Visit: _____

Type of Appointment: New Problem Follow-up Annual
Physical Other: _____

SECTION 1: SYMPTOMS (If applicable)

Describe Your Main Symptom:

What is the symptom?

When did it start?

How has it changed over time?

Getting worse Getting better Staying the same Comes and goes

How would you rate it? (Circle one)

Severity: 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10
(1 = mild, 10 = worst possible)

Location: (Circle or mark on body where applicable)

Quality: (How would you describe it?)

Sharp Dull Aching Burning Throbbing Pressure Other:

Timing/Pattern: - Constant or Intermittent? _____ - Time of day? _____ - How long does it last? _____ - How often does it occur? _____

What makes it better?

What makes it worse?

Associated symptoms: (Check all that apply)

Fever Nausea Vomiting Dizziness Shortness of breath
 Fatigue Weight loss Weight gain Night sweats
 Other:

SECTION 2: SYMPTOM DIARY (If tracking symptoms)

Date	Time	Symptom Severity (1-10)	Duration	Triggers	What Helped

SECTION 3: CURRENT MEDICATIONS

List ALL medications you're currently taking:

Include: Prescription medications, over-the-counter medications, vitamins, supplements, herbal remedies

Medication Name	Dose	How Often	What For	Prescribing Doctor

Medication allergies or adverse reactions:

Medications you've tried for this problem:

SECTION 4: MEDICAL HISTORY RELEVANT TO THIS VISIT

Previous similar episodes? Yes No

If yes, when and what happened:

Relevant past medical conditions:

Recent hospitalizations or procedures:

Recent injuries or accidents:

SECTION 5: FAMILY HISTORY (If relevant)

Family members with similar conditions:

Significant family medical history:

Heart disease Diabetes Cancer (type: _____)

High blood pressure Stroke Autoimmune disease

Mental health conditions Other: _____

SECTION 6: LIFESTYLE FACTORS

Smoking: Current Former Never

Amount: _____

Alcohol: None Occasional Regular

Amount: _____

Exercise:

Type: _____ Frequency: _____

Sleep:

Hours per night: _____ Quality: Good Fair Poor

Diet:

Any recent changes? Yes No

If yes, describe:

Stress level: (Circle one)

Low 1 - 2 - 3 - 4 - 5 - 6 - 7 - 8 - 9 - 10 High

Recent life changes:

- Job change Move Relationship change Loss/grief
 Other:
-

SECTION 7: IMPACT ON DAILY LIFE

How is this affecting your daily activities?

Work/School:

- No impact Some difficulty Significant difficulty Unable to work/attend

Sleep:

- No impact Some difficulty Significant difficulty Unable to sleep

Physical activity:

- No impact Some limitation Significant limitation Unable to be active

Social activities:

- No impact Some avoidance Significant avoidance Complete withdrawal

Mood:

- No impact Somewhat affected Significantly affected Severely depressed/anxious
-

SECTION 8: QUESTIONS FOR YOUR DOCTOR

Write your questions BEFORE your appointment. Prioritize them (most important first).

Questions about Diagnosis:

1.

2.

3.

Questions about Treatment:

1.

2.

3.

Questions about Prognosis:

- 1. _____
- 2. _____

Questions about Testing:

- 1. _____
- 2. _____

Questions about Lifestyle/Prevention:

- 1. _____
- 2. _____

Questions about Follow-up:

- 1. _____
- 2. _____

SECTION 9: CONCERNS TO DISCUSS

Things you're worried about:

Things you want to make sure doctor knows:

Things you don't understand from previous visits:

SECTION 10: GOALS FOR THIS VISIT

What do you hope to accomplish today?

- Get diagnosis
- Understand my condition better
- Start treatment

- Adjust current treatment
- Get referral to specialist
- Order tests
- Get clearance for activity/work
- Refill prescriptions
- Other:

Most important thing doctor should address today:

SECTION 11: NOTES DURING VISIT

Diagnosis/Assessment:

Tests ordered:

Treatment plan:

Medications prescribed/changed:

Follow-up plan:

When to call doctor:

Red flags to watch for:

SECTION 12: POST-VISIT ACTION ITEMS

- Fill prescriptions
 - Schedule tests: _____
 - Schedule follow-up appointment: _____
 - Schedule specialist appointment: _____
 - Make lifestyle changes: _____
 - Call doctor if: _____
 - Research: _____
 - Other: _____
-

TIPS FOR EFFECTIVE APPOINTMENTS

BEFORE:

- ✓ Complete this worksheet
- ✓ Bring list of current medications (or bring medication bottles)
- ✓ Bring previous test results if available
- ✓ Bring insurance card and ID
- ✓ Arrive 15 minutes early for paperwork
- ✓ Bring someone with you if discussing serious conditions

DURING:

- ✓ Be honest and complete (don't minimize or exaggerate)
- ✓ Ask questions if you don't understand
- ✓ Take notes or have someone take notes for you
- ✓ Ask doctor to repeat or clarify if needed
- ✓ Discuss concerns even if embarrassing
- ✓ Make sure you understand the plan before leaving

AFTER:

- ✓ Follow through on action items
 - ✓ Fill prescriptions promptly
 - ✓ Schedule follow-up appointments before leaving clinic
 - ✓ Call if instructions are unclear
 - ✓ Monitor for red flags discussed
 - ✓ Keep all follow-up appointments
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USING AI TO PREPARE

AI can help you:

Generate questions:

"What questions should I ask my doctor about [your symptoms/condition]?"

Understand terminology:

"What does [medical term] mean?"

Prepare symptom description:

"What information would help my doctor evaluate [your symptoms]?"

Learn about potential diagnoses:

"What are possible causes of [symptoms] I should discuss with my doctor?"

AI should NOT:

- ✗ Diagnose your condition
- ✗ Recommend specific treatments
- ✗ Tell you whether to see doctor
- ✗ Replace medical evaluation

Use AI to prepare for medical care, not to avoid it.

REMEMBER

You are the expert on your own body.

Your doctor is the expert on diagnosis and treatment.

Together, you make the best medical team.

Preparation helps you communicate effectively so your doctor can help you effectively.

Bring this completed worksheet to your appointment. It helps you remember everything you want to discuss and helps your doctor understand your situation completely.

**From: AI in the Exam Room - Patient Education Curriculum
Module 8: When AI Is Actually Helpful (Appropriate Use Cases)**