



Appointment Preparation Workbook

A printable guide for gathering priorities, questions, current information, documents, and follow-up ownership before a visit.

What this workbook helps you do

- [] State the purpose of the visit in plain language.
- [] Choose the two or three priorities that matter most for this conversation.
- [] Gather the current records and source documents you intend to use.
- [] Prepare questions and practical visit logistics in advance.
- [] Capture next steps, owners, dates, and unresolved questions after the visit.

A simple way to use it

- [] Work from the information and source material available to you.
- [] Leave uncertain or conflicting details visible for review.
- [] Use the worksheets before, during, and after the care moment as appropriate.
- [] Transfer selected information into CareTrove only when you choose.

Important boundary

This workbook supports organization and human review. It does not provide medical advice, diagnosis, treatment, medication guidance, emergency monitoring, or professional care instructions. Check important details against source documents and qualified professionals. Store completed pages securely and share only selected information.

Comprehensive checklist

Check the items that apply to the current situation. Skip anything that is not relevant, and keep questions open when a source or qualified professional still needs to confirm them.

1. Purpose and priorities

- ☐ Write one sentence explaining why the visit is happening.
- ☐ Choose the top two or three concerns or decisions for the available time.
- ☐ Note recent changes that give the visit important context.
- ☐ Separate practical goals from questions requiring professional judgment.
- ☐ Decide what a useful outcome from the visit would look like.

2. Current information and documents

- ☐ Review the current medication list against labels, source documents, or a qualified professional.
- ☐ Gather only the documents that are relevant to this visit.
- ☐ Bring referral, insurance, authorization, or intake items when applicable.
- ☐ Date any user-recorded lab or vital notes and keep the source visible.
- ☐ Mark discrepancies or missing confirmation instead of silently resolving them.

3. Questions and logistics

- ☐ Write questions before the visit and put the most important ones first.
- ☐ Mark questions that are clarification, follow-up, or appropriate for a later conversation.
- ☐ Confirm date, time, location, transportation, accessibility, and check-in requirements.
- ☐ Identify who will attend and who may need a selected update afterward.
- ☐ Keep private information out of unrelated messages and website forms.

4. During and after the visit

- ☐ Capture source-provided instructions in the wording available to you.
- ☐ Record appointments, calls, pickups, forms, and document requests.
- ☐ Assign each follow-up to a person and add a due date when possible.
- ☐ Mark medication or treatment questions for qualified professional review.
- ☐ Prepare a selected summary for anyone who genuinely needs the update.

Working worksheet

Use these fields as a private working page. Store completed pages securely and avoid sending them through CareTrove website forms.

Visit date, time, location, and professional

Purpose of the visit in one sentence

Top priorities for the conversation

Recent changes or context to mention

Documents, lists, or source material to bring

Questions in priority order

People who may need a selected update

Visit follow-up tracker

Use one row for each appointment, call, task, document request, pickup, or question that remains open.

Next step	Owner	Due	Status

Review before closing this work

- ☐ I recorded the source or context for significant instructions.
- ☐ I marked unclear information for confirmation.
- ☐ I assigned an owner to every practical next step.
- ☐ I reviewed what should remain private before sharing an update.

CareTrove connection

CareTrove can help organize selected records, documents, questions, tasks, and packet outputs around a care profile. Review information before use, and choose deliberately what leaves the private workspace.

Source and review log

Use this page to keep important details connected to their source and review status. A saved detail can remain unresolved until the right confirmation is available.

Source or document	Date	Detail to verify	Reviewed

Review prompts

- [] Which document, note, label, or conversation supports this detail?
- [] What appears current, and what still needs confirmation?
- [] What changed after the visit?
- [] What should be checked before anyone relies on it?

Additional notes

Notes, questions, changes, or items to revisit

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