Patient Pre-Visit Checklist

Use this checklist to get the most out of your next appointment.

Before your appointment:

☐ Create an online account with your insurance carrier. This will give you access to resources and allow you to review details about your claims later down the road.

☐ Make sure you have recieved your new insurance card (if you enrolled in a new health plan).

☐ Review your **Summary of Benefits & Coverage** to check if you should be expecting to pay a copay. ***Note: if you're enrolled in a High Deductible Health Plan, you'll be billed after your visit.***

☐ Make sure your doctor's office has received all labs, tests, and records from any specialists you have recently seen.

☐ Gather information and write down the following:

- o A list of any recent changes to your medical history. This includes recent emergency department visits or hospital stays, surgeries, new diagnoses, new medicines, etc.

- o A list of all medicines you are currently taking. This includes prescription medicines, over-the-counter medicines, vitamins, and supplements.

- o A list of questions you want to ask your doctor.

What to bring with you:

☐ Your insurance card and driver's license or another valid photo ID.

☐ Your credit or debit card if you need to make a copayment. ***Reminder: If you have any money in a health savings account (HSA) or medical flexible spending account (FSA), you can use these funds to pay for your copays!***

☐ All of the lists you wrote before the appointment, including:
- o Changes to your medical history, if any
- o All medicines you are currently taking
- o Your list of questions