PLANNING

# Know the purpose and limits

Set one visit goal and ask the clinic what records or support to bring.

CAREGIVER APPOINTMENT PREPARATION PACK

## SET A CLEAR NEXT STEP

Write one action you can complete before your next review.

- [ ] Name the task
- [ ] Choose a realistic time
- [ ] Identify the needed material

EXAMPLE

Example: ·Complete one focused task, then record what changed.·

PUT IT INTO PRACTICE

What is the smallest useful next action?

## DECIDE WHAT MATTERS

Use facts and constraints to choose the next step instead of trying to do everything at once.

- [ ] Check the official requirement
- [ ] Consider time and support needed
- [ ] Write the decision and reason

PUT IT INTO PRACTICE

What information would make this choice clearer?

This is general appointment-preparation information, not medical advice. For urgent symptoms or immediate danger, contact local emergency services. Follow the care team?s instructions.

PLANNING

# Create a health snapshot

Record facts, dates, allergies, medicines, contacts, and observed changes.

CAREGIVER APPOINTMENT PREPARATION PACK

## USE A PRACTICAL CHECKLIST

Keep the details visible so the next person can act without guessing.

- [ ] Confirm the date or requirement
- [ ] Record the owner
- [ ] Save the official source or contact

**EXAMPLE**

Example: ·Status: waiting for reply; owner: me; next check: Thursday.·

**PUT IT INTO PRACTICE**

What is still unclear, and who can confirm it?

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PLANNING

# Organize medicines and records

List name, dose, schedule, prescriber, and nonprescription products accurately.

CAREGIVER APPOINTMENT PREPARATION PACK

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PLANNING

# Plan questions and decisions

Put the key question first; ask about options, timing, and warning signs.

CAREGIVER APPOINTMENT PREPARATION PACK

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PLANNING

# Speak up during the visit

State the goal, timeline, and main concern; use teach-back to confirm the plan.

CAREGIVER APPOINTMENT PREPARATION PACK

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PLANNING

# Leave with an action plan

Write tests, referrals, changes, follow-up date, contact, and responsibility.

CAREGIVER APPOINTMENT PREPARATION PACK

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PLANNING

# Follow up and protect privacy

Log calls and results; use authorized channels and ask when instructions are unclear.

CAREGIVER APPOINTMENT PREPARATION PACK

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## MAKE ONE IMPROVEMENT

Keep what worked and change only one obstacle for the next cycle.

- [ ] Keep one helpful habit
- [ ] Remove one stale item
- [ ] Schedule the next review

**PUT IT INTO PRACTICE**

What made this week easier?