



MY VISIT NOTES + FOLLOW-UP PLAN

Capture the plan while you are in the room - then give every loose end a name, a deadline, and a next step.

DATE	CLINICIAN / PRACTICE	MAIN REASON FOR VISIT

WHAT WE THINK MAY BE GOING ON Working diagnosis, possibilities, or what is still uncertain.

TESTS, IMAGING + REFERRALS

WHAT WAS ORDERED?	WHERE / WITH WHOM?	WHEN / NEXT STEP?

MEDICATION CHANGES

MEDICATION	START / STOP / CHANGE	HOW / WHEN

**WHAT I SHOULD DO AT HOME** Treatment, tracking, activity, diet, hydration, or other instructions.**RESULTS + FOLLOW-UP TRACKER** One place for every loose end: timing, contact, and completion.

ITEM / TASK	BY WHEN?	HOW / WHO?	DONE
Lab / test result			☐
Referral / appointment			☐
Imaging / procedure			☐
Other			☐

FOLLOW-UP + SAFETY PLAN

FOLLOW UP IN / ON	CALL / RETURN SOONER IF

QUESTIONS I STILL HAVE Anything unresolved, anything I want clarified, anything I do not want to forget.