



# Yearly PCP Visit Checklist



## Before Your Appointment

### Gather Key Information

- Current medications, vitamins, supplements, and doses
- Any recent changes in health, symptoms, or concerns
- Allergies (medications, foods, environmental)
- Past medical history updates
- Family history changes that might matter

### Review Preventive Care

- Vaccines received in the past year
- Any screenings you're due for
- Dental visit status
- For kids: growth, sleep, school performance, behavior, nutrition

### Bring Important Documents

- Insurance card
- Any updated ACP docs (healthcare proxy, living will, etc)
- Any forms that need to be signed (school, camp, sports, work)
- A list of specialists and their contact information

## What to reflect on ahead of time

### Your Health & Daily Life

- How you've been feeling physically and emotionally
- Any changes in sleep, appetite, energy, or stress
- Any pain, discomfort, or symptoms you've been ignoring

### Lifestyle & Habits

- Movement and exercise
- Nutrition
- Substance use
- Screen time
- Social support and relationships

### Goals for the Year Ahead

- What you want to improve or understand better
- Habits you want to build or break
- Any upcoming life changes that might affect your health





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## What to bring up during your appointment

### Medications

- Any side effects
- Any medications you stopped taking
- Any refills you need

### Symptoms or Concerns

- Anything new, persistent, or worrying
- Even small things you've been meaning to ask about

### Preventive Care

- Screenings or vaccines you're due for
- Follow-up timelines

### Care Coordination

- Updates from specialists
- Any referrals you might need
- How to reach your provider between visits

## After your appointment

### Review Your Plan

- Next steps
- Any new medications
- Lifestyle recommendations
- Follow-up appointments or labs

### Update Your Records

- Add new medications to your list
- Save paperwork or instructions
- Note when your next visit should be scheduled

**Beacon members can have a post appointment debrief with me after their appointment**

