



Caregiver Visit Notes

Tracking instructions, follow-up items, medications, and next steps.

If you're attending a visit on behalf of someone else — a parent, spouse, child, or other loved one — this sheet helps you keep track of what was discussed and what comes next. Fill it in during the visit, or right after, while details are still fresh.

PATIENT NAME	DATE OF BIRTH	DATE OF VISIT
CAREGIVER NAME	RELATIONSHIP TO PATIENT	CAREGIVER PHONE
PROVIDER SEEN	REASON FOR VISIT	

1 What was discussed today

Main topics covered. What were the main concerns the provider addressed?

New diagnoses or changes in condition (if any).

What the provider explained about the diagnosis or plan. Capture the explanation in your own words.



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2 Medication changes

Track any medication started, stopped, or adjusted today. Confirm dose and timing before leaving the visit.

MEDICATION	DOSE	HOW OFTEN	CHANGE TYPE	REASON

3 Tests, referrals & follow-up scheduled

Anything ordered today — labs, imaging, specialist referrals, follow-up appointments.

WHAT WAS ORDERED	WHERE / WHO	WHEN	STATUS / NOTES



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4 Instructions for home

What does the patient need to do at home? Diet, activity, monitoring, when to give medications.

Daily routine — medications timing, meals, mobility, sleep.

What to monitor — symptoms, blood pressure, blood sugar, weight, mood, etc.

Restrictions or precautions — driving, exercise, diet, activities to avoid.

5 Warning signs — when to call or seek help

Write down any specific symptoms or changes the provider said to watch for, and what to do if they happen.

Call the clinic right away if: (480) 943-1220

Go to the ER or call 911 if:

6 Caregiver to-do list

Things to take care of after the visit. Check each one off as you go.

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7 Questions that came up — ask next time

Things you thought of after the visit, or questions the patient mentioned later. Bring these to the next appointment or send through the patient portal.

Document your authority to receive information
If you're picking up records, speaking to the care team, or making decisions on behalf of the patient, make sure your name is listed on their consent form (Resource 03) under "People we can share information with." Update this anytime through the patient portal or at the front desk.

KEEP MEDICAL INFORMATION SECURE
Bring this completed sheet to follow-up visits, or upload through the secure patient portal. Please do not email completed notes with health details.