

Follow-Up and Next Steps

Complete during or soon after the visit so the plan, timing, and responsibilities stay clear.

Appointment date

Provider or clinic

What the provider explained

Tests, referrals, and treatment changes

Tests, imaging, referrals, or medication changes

Who is responsible for each next step?

Timing and communication

When should results be available?

Who should I contact if I do not hear back?

Next appointment or follow-up date

Records to request, send, or update

Notes or questions that remain