

WALK IN READY, WALK OUT INFORMED

Make the Most of Your Doctor Visit

A questions-and-records checklist for getting what you need from a short appointment. Plain-English, from the team at Healthvocate.

40–80%
of what's said is forgotten (Kessels)

Minutes
are all most visits last — prepare

Your right
to a copy of your records (HIPAA)

A doctor visit is short, and patients forget 40–80% of what's said once they leave (**Kessels**). The fix isn't a better memory — it's a little preparation: knowing what to ask, taking notes, and getting your visit summary and records in writing. Here's how to walk in ready.

Before, during & after — your visit checklist

- 1 Pick your top three concerns.**
Visits are short, so lead with what matters most. Writing down your top three keeps your priorities from getting lost.
- 2 Bring your meds, symptoms, and history.**
A current medication list with doses, your symptoms and when they started, and any recent changes save time and prevent errors.
- 3 Ask the questions that matter.**
What is it? What are my options? What are the risks and benefits? What happens if I wait? (See the question bank below.)
- 4 Take notes — or bring someone who will.**
Write down the plan, or bring a family member or friend to listen. Ask whether you can record the visit.
- 5 Repeat the plan back.**
Summarize it in your own words — “So I should...” — to catch any misunderstanding before you leave the room.
- 6 Confirm next steps and warning signs.**
Ask what the follow-up is and when, and which symptoms mean you should call right away.
- 7 Get your after-visit summary and records.**
Ask for the visit summary, and request copies of test results and records — it's your right (HIPAA). Use your patient portal if you have one.
- 8 Follow up on results.**
No news isn't always good news. Confirm how and when you'll get results, and follow up if they don't arrive.

Questions worth asking

Topic	Questions to ask	Why it helps
Diagnosis	“What is it? How sure are you? How is it spelled?”	Lets you track and read up on it.
Tests	“What is this test for? What will the results tell us?”	Avoids surprise bills and confusion.
Treatment	“What are my options? The risks and benefits of each?”	Helps you choose, not just comply.
Medications	“Why this drug? Side effects? A cheaper option?”	Catches interactions and cost.
Timeline	“What if I wait? When should I feel better?”	Sets clear expectations.
Follow-up	“What’s next? Which warning signs mean call now?”	Prevents missed red flags.

Get it in writing

Ask for your after-visit summary before you leave. Request copies of results and records — your right (HIPAA). Use your patient portal to view notes and messages. Keep a simple folder or app with your health history.

Common mistakes

- Saving your biggest concern for the very end.
- Relying on memory instead of notes.
- Leaving unsure of the plan or next step.
- Not asking what test results mean.
- Assuming no news means good news.

Walk out with answers, not questions.

Healthvocate helps you prep your questions before a visit, then turns your after-visit summary and records into plain-English notes you can actually use — so nothing important gets lost. Start free at HealthVocate.com.

This guide is educational only and is not medical advice — for diagnosis or treatment, talk to your doctor. Healthvocate helps you organize questions and understand your own records; it does not provide medical opinions. You have a right to your medical records under HIPAA, though a provider may charge a reasonable fee and take time to fulfill the request. Outcomes vary and no result is guaranteed. Source for statistics: Kessels (2003).