Visit prep checklist

If you have a new complaint, please describe the symptom and indicate how long it has been present, when it is better or worse and any other information that might be helpful to the physician and/or staff.

To be completed in anticipation of a patient's upcoming visit	
Patient name:	Date of birth:
Date of previous visit:	Date of next visit:

Preventive screening	Due	Up-to-date	N/A	Target population and recommendation
PAP				Age 21 to 65 years Every 3 years if no history of abnormal PAPs (or every 5 years if over 30 and most recent PAP negative and HPV-negative)
Mammogram				Age 50 to 75 years Every 1 to 2 years; or for those 40 to 50 and >75 screening is optional
Colonoscopy				Age 50 to 75 years Every 10 years (more frequent if history of colon polyp or family history of colon cancer)
Bone density scan (DEXA)				Age 65 years Every 10 years for women if previous results were normal; every 5 years if symptoms of osteopenia exist
Abdominal aortic aneurysm				Age 65 to 75 years One-time screening for men who have ever smoked
Visual acuity				Age >65 years (new Medicare enrolees) Can be completed during the "Welcome to Medicare" visit
Glaucoma screen				Age >65 years Annually

Immunization	Due	Up-to-date	N/A	Target population and recommendation
Tdap vaccine				Age >19 years Administer Tdap once; boost with Td every 10 years
Influenza vaccine				Age >6 months Annually
Shingles vaccine				Age >60 years Option if >50 years
Pneumococcal vaccine (PCV13 or PPSV23)				Age >65 years • PCV13 now, followed by PPSV23 six to 12 months later • If already received PPSV23, wait at least one year before giving PCV13 Patients age 18 to 65 with a chronic* or immunocompromising condition may also need a pneumococcal vaccine.

Source: AMA. Practice transformation series: implementing a daily team huddle. 2015.

*Chronic conditions include: COPD, DM, CVD, CKD, chronic liver disease, splenectomy, etc.

Please note that these clinical guidelines change frequently and are meant as an example only. The checklist can be modified so you can update it based on your patient population and current guidelines. You may use this checklist to build the capability to "flag" upcoming care needs in your electronic health record (EHR).