

## Visit planner checklist: order sheet for patient visits

Patient name:	
Upcoming visits/labs:	Date of last annual exam:

<b>Today's appointment</b>		<input type="checkbox"/> Patient should complete these tests and return to the office today. <input type="checkbox"/> Patient should complete the tests today but does not need to return to the office.
	Chest x-ray	Albumin, alkaline phosphate, SGOT, SGPT, total bili
	X-ray of abdomen, flat and upright	<i>H. pylori</i> screen
	Doppler ultrasound, lower extremities	Amylase
	C-troponin I	Folate
	Complete blood count	Ova and parasite exam
	BUN/creatinine	Stool culture and sensitivity
	Erythrocyte sedimentation rate	Urinalysis
	Sodium/potassium	Urinalysis C&S
	Free T4	Ferritin
	Thyroid-stimulating hormone	Serum protein electrophoresis
	Brain natriuretic peptide	Other:

<b>Follow-up appointment</b>		Patient should return for follow-up appointment in ____ month(s). These tests should be done one week before the appointment unless all results are available within 30 minutes.
	Lipids/SGOT	Erythrocyte sedimentation rate
	CRP	Hg
	2-hr postprandial glucose	Sodium/potassium/creatinine/Hg
	Fasting blood sugar & A1C	Microalbumin/creatinine
	Reticulocyte count	Chest X-ray
	BUN/creatinine	Mammogram <input type="checkbox"/> L <input type="checkbox"/> R
	Thyroid-stimulating hormone	Free T4
	1 month & 2 month INR & call; 3 month INR & appointment	Renal ultrasound, iron/iron binding, ferritin, parathyroid panel
	Fasting blood sugar	Other:

<b>Annual exam</b>		Patient should return in _____month(s) for annual exam. These tests should be done one week before the appointment unless all results are available within 30 minutes.	
	Lipids/SGOT		Thyroid-stimulating hormone
	Fasting blood sugar		Urinalysis
	Hg		Sodium/potassium/creatinine/Microalbumin
	Mammogram <input type="checkbox"/> L <input type="checkbox"/> R		Fasting blood sugar & A1C
	PSA (if male over 50)		Other:
	Diabetic panel & appointment with diabetes educator		

<b>Procedure</b>		Patient should return in _____ months. These tests should be done one week before the appointment unless the results are available within 30 minutes or “same day” is indicated.	
	Ankle-brachial index		Pelvic ultrasound w/vaginal probe (same day)
	Carotid ultrasound		Right upper quadrant ultrasound (same day)
	DEXA scan		24-hour glucose monitor
	Stress Echocardiogram (Beta blocker: <input type="checkbox"/> Y <input type="checkbox"/> N)		Upper gastrointestinal x-ray (same day)
	Echocardiogram		Colonoscopy
	Stress Test		Diabetic eye exam
	Aortic ultrasound (same day)		Diabetes appointment with nurse practitioner
	24-hour Holter monitor		Diabetes class
	Overnight oximetry		Dietitian appointment
	Endometrial biopsy		Weight management class
	Thyroid ultrasound (same day)		Smoking cessation
	CT abdomen/pelvis (same day)		Other:
	CT chest (same day)		
	CT head (same day)		

Source: AMA. Practice transformation series: pre-visit laboratory testing, 2015.

This checklist can be modified to meet the needs of your practice. Update the checklist based on your patient population and current guidelines before implementing. Practices are encouraged to use this as a guide to streamline electronic order entry and order sets in their electronic health record.