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Universal Provider Visit Prep Checklist

For any appointment, any diagnosis — September 2026 Freebies Vault

Built on the ROOT Framework: Reveal · Offer · Outline · Take Note

REVEAL — What You Want the Provider to Know

jot it down before you forget it in the room

Main concern(s) for this visit

When it started / how it's changed

What makes it better or worse

OFFER — What to Bring

- ☐ Photo ID & insurance card
- ☐ Current medication / supplement list
- ☐ Prior test results or records
- ☐ Symptom log or tracker (if using one)
- ☐ This checklist / your written questions
- ☐ Support person, if you're bringing one

OUTLINE — Questions Worth Asking, Regardless of Diagnosis

- ☐ What are all my options here — not just the first one you'd suggest?
- ☐ Can you explain that in plain language? I want to make sure I understand.
- ☐ What should I watch for that would mean I need to come back sooner?
- ☐ What happens if we wait, or if this treatment doesn't work?

Your own question:

TAKE NOTE — Appointment Log & Your Script

Appointment date

Provider name

Plan / next steps & who I'm looping in after

If you feel dismissed, say:

"I want to make sure this concern gets documented today, even if we're not acting on it yet. Can we note in my chart that I raised this? And can you help me understand what it would take for us to look into it further?"

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