

Appointment Readiness Checklist

Use before in-person or telepsychiatry appointments.

Patient name:	_____	Date of birth:	_____
Date completed:	_____	Appointment date:	_____

Documents and information

- ☐ Completed requested questionnaires or symptom trackers
- ☐ Current medication list, including vitamins, supplements, and over-the-counter products
- ☐ Medication bottles or photos of labels when the list is uncertain
- ☐ Allergy and adverse-reaction list
- ☐ Preferred pharmacy name, location, and phone number
- ☐ Recent laboratory results, vital signs, weight, ECG, imaging, or discharge paperwork if relevant
- ☐ Insurance card and identification, when required
- ☐ Names and contact information for primary care and other treating clinicians
- ☐ Questions, treatment priorities, and medication refill needs
- ☐ Information about pregnancy, breastfeeding, contraception, or pregnancy plans when relevant
- ☐ A support person available for collateral information, when appropriate and authorized

Telepsychiatry setup

- ☐ Private, reasonably quiet location
- ☐ Charged device and stable internet connection
- ☐ Camera and microphone tested
- ☐ Headphones available if privacy is limited
- ☐ Physical location and emergency contact available to provide at the start of the visit
- ☐ Medication list and pharmacy information within reach
- ☐ No driving or operating machinery during the appointment
- ☐ Plan for childcare, pets, interruptions, and translation needs

Top questions for today

1. _____

2. _____

3. _____

4. _____

5. _____

Emergency reminder

Routine appointments, email, voicemail, and portal messages are not emergency services. Call 911 or go to the nearest emergency department for immediate danger. In the United States, call or text 988 for suicidal crisis or emotional distress.

