

Safe Haven Connect CIC · Registered CIC

Medical Appointment Planner

Organise Your Appointments, Questions & Health Journey

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Welcome

Managing medical appointments can sometimes feel overwhelming, especially if you're seeing more than one healthcare professional. Keeping everything in one place can help you stay organised, remember important information and get the most out of every appointment.

This planner has been designed to help you prepare before appointments, record what was discussed and keep track of future care and treatment.

Whether your appointments are with your GP, hospital consultant, dentist, physiotherapist, mental health team or another healthcare professional, this planner can support you throughout your health journey.

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What's Inside

Personal Information

Emergency Contacts

My Healthcare Team

Appointment Calendar

Appointment Preparation

Questions for My Healthcare Professional

Appointment Notes

Test & Scan Record

Referral Tracker

Follow-Up Appointment Planner

Health Goals

Medication Review Notes

Personal Notes

Resources

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Why Use an Appointment Planner?

This planner can help you:

Prepare for appointments.

Remember important questions.

Record advice from healthcare professionals.

Keep track of referrals and test results.

Monitor your health over time.

Feel more confident during appointments.

Keep all your healthcare information together.

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Personal Details

Full Name

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Preferred Name

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Date of Birth

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NHS Number (Optional)

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Telephone

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Emergency Contact

Name

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Relationship

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Telephone

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My Healthcare Team

| Professional | Name | Contact Number |
|--------------|------|----------------|
|--------------|------|----------------|

|    |  |  |
|----|--|--|
| GP |  |  |
|----|--|--|

|                |  |  |
|----------------|--|--|
| Practice Nurse |  |  |
|----------------|--|--|

|            |  |  |
|------------|--|--|
| Consultant |  |  |
|------------|--|--|

|            |  |  |
|------------|--|--|
| Pharmacist |  |  |
|------------|--|--|

|                 |  |  |
|-----------------|--|--|
| Physiotherapist |  |  |
|-----------------|--|--|

|                        |  |  |
|------------------------|--|--|
| Occupational Therapist |  |  |
|------------------------|--|--|

|                    |  |  |
|--------------------|--|--|
| Mental Health Team |  |  |
|--------------------|--|--|

|         |  |  |
|---------|--|--|
| Dentist |  |  |
|---------|--|--|

|          |  |  |
|----------|--|--|
| Optician |  |  |
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Other

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## Reflection

Every appointment is an opportunity to understand your health better. Preparing in advance and recording important information can help you feel more confident, ask the questions that matter and play an active role in your healthcare.

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Next: Section 1 – Appointment Calendar & Preparing for Your Appointment, where you'll record upcoming appointments, appointment reminders, reasons for attending and the questions you want to ask your healthcare professional.

## Section 1 – Appointment Calendar & Preparing for Your Appointment

Preparing before your appointment can help you make the most of your time with your healthcare professional. Writing down your symptoms, questions and concerns in advance means you're less likely to forget something important.

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## My Upcoming Appointments

| Date | Time | Healthcare Professional | Location | Purpose |
|------|------|-------------------------|----------|---------|
|------|------|-------------------------|----------|---------|

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## Appointment Reminder Checklist

Before I leave home, I have:

☐ Confirmed the appointment time

- ☐ Packed this planner
- ☐ Brought my medication list
- ☐ Written down my questions
- ☐ Packed any test results or letters
- ☐ Arranged transport
- ☐ Taken my glasses or hearing aids (if needed)
- ☐ Brought a support person (if needed)
- ☐ Arrived with enough time

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Preparing for My Appointment

Date

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Healthcare Professional

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Reason for Appointment

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My Symptoms

What symptoms have I noticed?

- ☐ Pain

- ☐ Fatigue
- ☐ Breathlessness
- ☐ Dizziness
- ☐ Sleep problems
- ☐ Anxiety
- ☐ Low mood
- ☐ Appetite changes
- ☐ Weight changes
- ☐ Other

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When Did My Symptoms Start?

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How Have They Changed?

- ☐ Improved
- ☐ Stayed the same
- ☐ Become worse
- ☐ Come and go

Explain:

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### Questions I Want to Ask

1.

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2.

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3.

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4.

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5.

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### Things I Don't Want to Forget

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#### Information to Share

- ☐ New symptoms
- ☐ Medication side effects
- ☐ Changes in medication
- ☐ Recent hospital stay
- ☐ Mental health changes
- ☐ Lifestyle changes
- ☐ Family history
- ☐ Concerns about treatment
- ☐ Other

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#### My Goals for This Appointment

- ☐ Better understand my condition
- ☐ Receive test results
- ☐ Discuss treatment options
- ☐ Review medication
- ☐ Ask for a referral
- ☐ Discuss symptoms
- ☐ Create a treatment plan

☐ Gain reassurance

☐ Other

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### Reflection

Preparing before your appointment can help you feel more confident and ensure your healthcare professional has the information they need to support you. Remember, no question is too small when it comes to your health.

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Next: Section 2 – Appointment Notes & Treatment Plan, where you'll record what was discussed, advice given, medication changes, referrals, tests, follow-up actions and your next appointment.

### Section 2 – Appointment Notes & Treatment Plan

This section gives you space to record what happened during your appointment. Writing down key information can help you remember advice, understand your treatment plan and prepare for future appointments.

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### Appointment Summary

Date

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Healthcare Professional

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Location

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Reason for Appointment

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What Was Discussed?

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Diagnosis or Update

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Advice I Was Given

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### Medication Changes

| Medication | Change Made | Reason |
|------------|-------------|--------|
|------------|-------------|--------|

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### Tests, Scans or Investigations

| Test | Date | Reason | Results |
|------|------|--------|---------|
|------|------|--------|---------|

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### Referrals

| Referred To | Reason | Date |
|-------------|--------|------|
|-------------|--------|------|

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### Action Plan

What do I need to do before my next appointment?

- ☐ Take medication as prescribed
- ☐ Arrange tests
- ☐ Book another appointment
- ☐ Complete a health diary
- ☐ Exercise as advised
- ☐ Make lifestyle changes
- ☐ Contact another service
- ☐ Monitor symptoms
- ☐ Other

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### My Follow-Up Appointment

Date

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Time

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Location

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Healthcare Professional

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Questions for Next Time

1.

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2.

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3.

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4.

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5.

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Personal Notes

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## Reflection

Every appointment is an opportunity to learn more about your health and take an active role in your care. Recording important information can make it easier to remember advice, follow your treatment plan and feel more confident at future appointments.

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Next: Section 3 – Test Results, Referrals & Health Progress, including a health tracker, investigation results, referral progress, treatment milestones and ongoing health goals.

## Section 3 – Test Results, Referrals & Health Progress

Healthcare often involves more than appointments. You may have blood tests, scans, referrals and ongoing treatment. Keeping a record of these can help you understand your progress and make it easier to discuss your health with your healthcare team.

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## Test Results Record

| Date | Test | Reason | Result | Follow-Up Needed |
|------|------|--------|--------|------------------|
|------|------|--------|--------|------------------|

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### Scan & Investigation Record

| Date | Scan or Investigation | Outcome | Next Steps |
|------|-----------------------|---------|------------|
|------|-----------------------|---------|------------|

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### Referral Tracker

| Date Referred | Service | Reason | Appointment Date | Outcome |
|---------------|---------|--------|------------------|---------|
|---------------|---------|--------|------------------|---------|

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### Health Progress Tracker

Rate how you've been feeling over time.

| Date | Physical Health (1–10) | Mental Wellbeing (1–10) | Energy (1–10) | Sleep (1–10) |
|------|------------------------|-------------------------|---------------|--------------|
|------|------------------------|-------------------------|---------------|--------------|

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### My Health Goals

Tick any goals you're working towards.

☐ Managing my condition

- ☐ Improving fitness
- ☐ Better sleep
- ☐ Healthier eating
- ☐ Weight management
- ☐ Taking medication regularly
- ☐ Managing stress
- ☐ Stopping smoking
- ☐ Reducing alcohol
- ☐ Returning to work or education
- ☐ Improving mental wellbeing
- ☐ Other

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#### Progress Since My Last Appointment

What improvements have I noticed?

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What challenges am I still experiencing?

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### Lifestyle Changes

Tick any positive changes you've made.

- ☐ Exercising more
- ☐ Eating healthier
- ☐ Sleeping better
- ☐ Drinking more water
- ☐ Reducing stress
- ☐ Becoming more active
- ☐ Taking medication consistently
- ☐ Improving work-life balance
- ☐ Asking for support
- ☐ Other

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### My Achievements

No achievement is too small.

This month I am proud that I...

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## Notes

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## Reflection

Looking back at your progress can help you recognise positive changes that might otherwise go unnoticed. Recovery and improving your health often happen one small step at a time. Celebrate every achievement and remember that setbacks do not erase the progress you've already made.

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Next: Section 4 – Personal Health Record, Resources & Final Notes, including emergency contacts, important health information, useful reminders, disclaimer, About Safe Haven Connect CIC and copyright page.

Section 4 – Personal Health Record, Resources & Final Notes

Keeping important health information in one place can make appointments, hospital visits and emergencies easier to manage. Use this section as a quick reference whenever you need it.

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### My Important Health Information

Blood Group (if known)

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Height

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Weight

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NHS Number (Optional)

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Organ Donor

☐ Yes

☐ No

☐ Unsure

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My Long-Term Health Conditions

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### Important Allergies

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### Emergency Contacts

| Name | Relationship | Telephone |
|------|--------------|-----------|
|------|--------------|-----------|

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### Important Healthcare Contacts

| Service | Contact Number |
|---------|----------------|
|---------|----------------|

GP Surgery

Pharmacy

Hospital

Consultant

Community Nurse

Mental Health Team

NHS 111      111

Emergency Services 999

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### My Personal Health Checklist

- ☐ Attend appointments
- ☐ Order repeat prescriptions
- ☐ Take medication as prescribed
- ☐ Stay active
- ☐ Eat balanced meals
- ☐ Drink enough water
- ☐ Get enough sleep
- ☐ Monitor symptoms
- ☐ Ask questions when unsure
- ☐ Keep this planner updated

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### Useful Reminders

Keep an up-to-date medication list.

Bring this planner to appointments.

Write down questions before each visit.

Record any changes in your symptoms.

Follow the treatment plan agreed with your healthcare professional.

Don't be afraid to ask for clarification if you don't understand something.

Small improvements are still progress.

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## Personal Notes

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## Final Reflection

Looking after your health is a lifelong journey. Staying organised, asking questions and understanding your treatment can help you feel more confident and involved in your care.

Remember that you are an important member of your healthcare team. By keeping accurate records and working closely with your healthcare professionals, you can make informed decisions and take positive steps towards maintaining your wellbeing.

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## Disclaimer

This planner has been created by Safe Haven Connect CIC to help individuals organise their healthcare information and prepare for medical appointments.

It is intended for educational and organisational purposes only and does not replace medical advice, diagnosis or treatment from a qualified healthcare professional.

Always seek advice from your GP, specialist or other healthcare professional regarding your health. If you experience a medical emergency, call 999 immediately.

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## About Safe Haven Connect CIC

Safe Haven Connect CIC is a UK Community Interest Company committed to making health and mental wellbeing support accessible to everyone.

We provide free workbooks, planners, self-help resources and practical tools to empower people to take an active role in their physical and mental wellbeing.

Website:

<https://safehavenconnect.org>

Free Workbook Library:

<https://safehavenconnect.org/workbooks>

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