My Health Checklist

A guide to help you prepare for your medical appointment

Name _____

Date _____

Age-Friendly Health Systems

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).

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This guide is designed to help you get ready for your medical appointment.

It's meant especially for older adults.

First, it will help you think about different aspects of your health and living well. Then it will help you identify the most important questions or concerns you want to talk about with your provider. A provider is a doctor, nurse practitioner, primary care practitioner (PCP), etc.

Being prepared for your appointment can help you get the care that's right for you. You are part of the team. You can have a say in your care.

This guide focuses on four areas that can help you think about your health.

What **Matters** to you in your life

Medication you may take

Your **Mind** and sense of well-being

Your **Mobility**

The 4Ms

For each of the 4Ms, we'll ask you about your situation now, what's going well, and what could be better. Then you can write down any questions you have or things you want to share with your provider.

Tips for completing this guide

- **You can complete this guide in any order you like**. This is about what works for you.
- **Take it in small pieces.** It's always okay to skip a question. It's fine to take a break and come back later.
- **You can talk about your answers with someone you trust.**
- **These pages are for you — to help you gather your thoughts.** Later, you can decide what to share with your provider.
- **You can print this guide in a larger font.** Go to ihi.org/myhealthchecklist for instructions and more resources.

If you are helping someone else complete this guide:

- Talk about why this will help. You might say, "I want to make sure we talk about what's most important to you, so we (or you) can have a more useful conversation with your provider."
- Focus on what matters to the person you are supporting. Remember this is a conversation about their care needs and goals.

If you are completing this guide on a computer:

First, save the guide to your desktop.

Then open the saved guide and type in your answers.

(Otherwise, what you type will not be saved.)

What Matters

Think about what is most important to you and what you enjoy most. This can help you think about what's most important for your health.

- **Your situation now** • What are the most important things in your life right now? Have there been any health or life changes since your last appointment?

SOME IDEAS Being regularly in touch with the people I care about • Adjusting to retirement • Recent death in the family • Feeling anxious or worried

- **What's going well?** What activities do you like to do?

SOME IDEAS Play music • Watch sports • My job • Visit my grandchildren • Involved in my community

What could be better? Is anything getting in the way of what you like to do?

SOME IDEAS Trouble sleeping • Caregiving for a sick relative or friend • Want to spend more time with people • Low energy • Harder to get around • Bladder control issues • Hard to get healthy food • Trouble hearing conversations

What do you want your provider to know about you?

SOME IDEAS Who I'm responsible for • My goals for the year • Who I live with • I want to learn more about healthy eating • Still feeling "off" since the surgery • Who or what in my life makes me feel better • Who or what makes me feel worse

Medication

If needed, medication can be an important part of your health. It's important to make sure it's working well.

Some medication affects us differently as we age. It may interact with other medication or with food, sometimes negatively. We might want to start or stop taking it, or try a different dose.

Your situation now • What medications do you take regularly (if any)? What medications do you take only when needed?

Include vitamins, herbal supplements and oils, prescriptions, over-the-counter medications, and anything you take to feel better.

SOME IDEAS Calcium • Heart medicine • Inhaler (when my allergies act up) • Diabetes medicine • Daily aspirin

What's going well? Are your medications helping you reach your goals?

SOME IDEAS More active • Better appetite • Sleeping better

What could be better? Are your medications causing any problems?

SOME IDEAS Tired all the time • Medicine costs too much • Not sure if medicine is working • Feeling dizzy or nauseated • Bad reaction to medicine • Hard to keep track of what to take and when

What questions or concerns do you have for your provider?

SOME IDEAS I can't afford to pay for my medicines • Do I still need all of these medicines? • Should we check my cholesterol/ blood pressure? • Who can I call if I have questions? • Are my vaccines up to date?

NOTE • Always talk with your provider before starting or stopping a medication or changing how much you take.

Mind

This is about your mood and your sense of well-being. It's also about your mental ability and memory.

Use the scales below. There are no right or wrong answers.

Your situation now

How happy do you feel on most days?

Mostly unhappy — Mostly happy

How much do you worry about changes in your memory?

Very worried — Not worried

If applicable, how much do people near you worry about changes in your memory?

Very worried — Not worried

Do you want to add anything about your answers?
Have you noticed any changes in your mood or memory?

SOME IDEAS Feeling happier • Worrying more • Forgetting words • Forgetting where I'm going

NOTE • Sudden confusion or sleepiness could be delirium. You might say things that don't make sense or forget where you are. Delirium needs to be treated. If you or someone you know sees these new changes, call a provider right away.

What's going well?

SOME IDEAS Doing well at work • Excited to see my grandchild • When I feel upset, I have someone I can call • Volunteering

What could be better?

SOME IDEAS Feeling down most days • Trouble focusing • Experiencing grief or regret • Feeling lonely • Relationships and intimacy

What questions or concerns do you have for your provider?

SOME IDEAS Sometimes I forget things — do I have a health problem? • I'm stressed that I don't have the help I need

Mobility

Mobility is about how you move and get around. This includes everything from exercising to getting around the house to going places.

Your situation now • How do you move around at home? How do you get from place to place?

SOME IDEAS

At home… I go for walks • On my feet a lot • I use a cane at times • I do physical therapy • I use a wheelchair

Getting around… I take the bus • My friend and I drive to errands together • Don't have a cell phone to reach people • I walk • There's no transportation for me

What's going well?

SOME IDEAS

My home is comfortable to move around in • I regularly do exercise videos • My foot pain is better • I walk my dog

What could be better? Does anything limit you?

SOME IDEAS Trouble breathing when I walk • Feel unsteady when I shower • I've tripped and had a couple of falls • I don't want to drive at night • It's hard to carry my laundry to the machine • Hard to reach higher shelves lately • My back pain means I don't want to exercise

What questions or concerns do you have for your provider?

SOME IDEAS I've had shoulder pain for a long time — what can we do? • Need a way to get groceries • What changes could make it safer to move around in my home? • I'm not very active — what activities are safe for me? • What if I can't live in my house anymore?

Putting It All Together

- **Look back over all of your answers.**
  Write up to 3 of your most important questions or concerns for your provider.

  1. _____

  2. _____

  3. _____

  SOME IDEAS How can I reduce my knee pain? • Can I take a test to check my memory? • How can I get stronger?

- **You may want to talk your answers over with a support person or caregiver.** You can ask them to come with you to your appointment.

  Their name: _____

- **Your answers may change over time.** You can come back to this guide any time to update your answers and write down more questions for your provider.

Bring your questions (and this guide) to your next conversation with your provider. Talking about the things that matter to you helps them understand you better. Then together you can choose the kind of care that's right for you.

To start the conversation, you might say: "Can we talk about a couple things that are really important to me?" It's okay to ask questions more than once if the answer isn't clear.

SCAN FOR MORE RESOURCES