­Visit planner checklist: Order sheet for patient visits

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

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| Today’s appointment  | ⬜ Patient should complete these tests and return to the office today.⬜ 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  |  | *H. pylori* 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: |

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| Follow-up appointment | 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 🞏 L 🞏 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:  |

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| Annual exam | 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 🞏 L 🞏 R |  | Fasting blood sugar & A1C |
|  | PSA (if male over 50)  |  | Other: |
|  | Diabetic panel & appointment with diabetes educator  |

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| Procedure  | 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: 🞏 Y 🞏 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.