FOR A MEDICAL VISIT OR MEDICARE-HELP APPOINTMENT

Caregiver appointment preparation sheet

Plan together. Let the person receiving care lead whenever possible.

Keep personal records private. Bring them only to the appropriate clinician, licensed insurance agent or authorized professional. Do not send medical records, Medicare numbers or patient lists to the senior center.

- ☐ **Agree on the visit.** Choose the main concern and the caregiver's role. Confirm the appointment, transportation and any interpreter or accessibility needs.
- ☐ **For a medical visit, prepare:** A medicine and supplement list with doses; allergies; symptoms and when they began; relevant recent visits or test results. Bring only what the clinician needs.
- ☐ **For Medicare help, prepare:** Your coverage cards, plan notices, doctor list, prescriptions and pharmacy. Ask which documents are needed and how to share them securely.
- ☐ **Ask questions—and take notes.** Medical: What are the next steps? How will we get results? Medicare: Is this provider or medicine covered? What might it cost? Who can confirm?
- ☐ **Check permission and next steps.** Ask each office what permission it needs to speak with a caregiver. CMS-10106 gives 1-800-MEDICARE permission to share your personal health information with someone you choose; this sheet is not an authorization. Confirm who will do what, and by when.

One question to bring: _____
Next action / by when: _____
Caregiver support in Salt Lake County: 385-468-3200.

Boo Insurance Services Inc. • Licensed insurance agency
61 W 13490 S Ste 201, Draper, UT 84020
801-255-5341 • TTY 711 • Mon–Fri 9am–5pm Mountain Time
Medicare: 1-800-633-4227 • TTY 1-877-486-2048 • 24 hours a day, 7 days a week, except some federal holidays.

Not connected with or endorsed by the United States government or the federal Medicare program.

Serving Utah residents. We do not offer every plan available in your area. Currently we represent 9 organizations which offer 58 products in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options.