

Visit Planner Checklist: Order Sheet for Patient Visits

Modify this checklist to meet the needs of your practice. Update the checklist based on your patient population and current clinical practice 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.

Please note that these clinical guidelines change frequently and are meant as examples only.

Patient name:	
Today's visit date:	Visit type (circle): Acute Annual
Date of next visit:	Date of last annual wellness check:

Today's appointment	<input type="checkbox"/> Patient should complete these tests and return to the office today.
	<input type="checkbox"/> Patient should complete the tests today but does not need to return to the office.
Chest X-ray	Lipid panel
EKG	Vitamin D level
Doppler ultrasound, lower extremities	<i>H. pylori</i> stool antigen
Complete blood count without differential	B ₁₂ level
Complete blood count with differential	Prostate-specific antigen (PSA)
Basic metabolic panel	Urinalysis
Complete metabolic panel	Urine culture
HbA _{1c} (venous)	Ferritin
HbA _{1c} (point-of-care testing [poc])	Other:
Thyroid-stimulating hormone (TSH)	

Follow-up appointment	Patient should return for follow-up appointment in _____ month(s).
	These tests should be done 1 to 2 days before the appointment
Complete blood count without differential	<i>H. pylori</i> stool antigen
Complete blood count with differential	B ₁₂ level
Basic metabolic panel	Prostate-specific antigen (PSA)
Complete metabolic panel	Urinalysis
HbA _{1c}	Urine culture
Thyroid-stimulating hormone (TSH)	Ferritin
Lipid panel	Other:
Vitamin D level	

(continued on next page)

Referrals, screening, additional testing	
Ankle-brachial index	Cologuard
Carotid ultrasound	Colonoscopy
Stress echocardiogram	Physical therapy referral
Echocardiogram	Behavioral health referral
Aortic ultrasound (AAA screening)	Diabetes education
24-hour Holter monitor	Dietitian referral
DEXA scan	Dermatology referral for skin check
Thyroid ultrasound	Smoking cessation counseling
CT chest for lung cancer screening	Other:
Right upper quadrant ultrasound	Other:

Source: AMA. Practice transformation series: Daily Team Huddles. 2022.

Disclaimer: AMA STEPS Forward® content is provided for informational purposes only, is believed to be current and accurate at the time of posting, and is not intended as, and should not be construed to be, legal, financial, medical, or consulting advice. Physicians and other users should seek competent legal, financial, medical, and consulting advice. AMA STEPS Forward® content provides information on commercial products, processes, and services for informational purposes only. The AMA does not endorse or recommend any commercial products, processes, or services and mention of the same in AMA STEPS Forward® content is not an endorsement or recommendation. The AMA hereby disclaims all express and implied warranties of any kind related to any third-party content or offering. The AMA expressly disclaims all liability for damages of any kind arising out of use, reference to, or reliance on AMA STEPS Forward® content.