

Second Opinion Prep Checklist

A second opinion can help clarify diagnosis, treatment options, timing, risks, and next steps.

Important: This worksheet is for general educational purposes only. It is not medical advice, diagnosis, or treatment. Talk with a qualified healthcare professional about your personal situation. If you may be having a medical emergency, call 911 or your local emergency number.

Before scheduling

- ☐ Confirm insurance coverage.
- ☐ Ask whether a referral is needed.
- ☐ Choose an appropriate specialist.
- ☐ Ask what records are needed before the visit.
- ☐ Schedule enough time before any non-urgent decision deadline.
- ☐ Ask whether records should be sent before the appointment.

Records to gather

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| ☐ Office notes | ☐ Medication list |
| ☐ Lab results | ☐ Allergy list |
| ☐ Imaging reports | ☐ Procedure notes |
| ☐ Actual imaging files, if needed | ☐ Hospital records |
| ☐ Pathology reports | ☐ Prior treatment history |

Questions to ask

- ☐ Do you agree with the diagnosis?
- ☐ Do you agree with the recommended treatment plan?
- ☐ Are there other reasonable options?
- ☐ What are the risks and benefits of each option?
- ☐ Is there anything urgent about this decision?
- ☐ What would you do next if I choose to wait?
- ☐ What should I discuss with my original doctor?
- ☐ Are additional tests needed before deciding?

Notes

Important points from the second opinion
