



Client Medical Examination Checklist

CAPITAS® FINANCIAL

The following tips are to help you obtain the most favorable and accurate exam results possible.

Medical Examination Checklist

BEFORE YOUR EXAM...DO'S

- ✓ Schedule the exam for the morning. You will be more relaxed at this time of day.
- ✓ Limit salt and high-cholesterol foods for 3 – 4 days prior to the exam.
- ✓ Make a list of all the medications you currently take, including non-prescription drugs. Continue taking your medication as usual.
- ✓ Make a list of any physicians or specialists you have consulted. Be sure to include their name(s), address(es) and phone numbers.
- ✓ Get a good night's sleep so you can be well-rested for the exam.
- ✓ Consider rescheduling the exam if you have an acute illness or feel sick and not rested. Some acute illnesses can affect the blood and urine test results.
- ✓ Stay hydrated in the hours before your exam to help in obtaining a urine specimen.
- ✓ Wear clothing with short sleeves or sleeves that can be easily rolled up to your exam.
- ✓ If you are having the exam completed anywhere other than your home, arrive at the examination office 10 – 15 minutes before the exam. Do Not Rush.
- ✓ Women should tell the examiner if they are experiencing a menstrual period at the time of the exam as this affects urine findings. A notation will be added to the lab slip to ensure accurate results.
- ✓ Relax.

BEFORE YOUR EXAM...DON'TS

- ✓ Avoid alcohol for at least 24 hours prior to the exam.
- ✓ Avoid strenuous exercise for 24 hours prior to the exam.
- ✓ Avoid all tobacco products within one (1) hour of the exam if you are a smoker. Tobacco tends to constrict artery walls and may elevate blood pressure.
- ✓ Avoid heavy meals and caffeine (coffee, tea, soft drinks, & some medications (as directed by your doctor)). Adhere to any fasting guidelines your doctor or examiner may have provided you.

Specific Medical Condition Exam Tips

HYPERTENSION

- DO** take your regular medication (if applicable).
- DO NOT** use stimulants (caffeine, alcohol, cigarettes, exercise, some OTC medication).
- DO** have your blood pressure taken after you've had a chance to relax. Three (3) attempts at 10-minute intervals.

DIABETES

- DO** take your regular medication (if applicable).
- DO** take the exam 2½ hours after a meal.
- DO NOT** consume any sweets or extra sugar at the meal prior to insurance exam.
- DO** empty your bladder after meal prior to insurance exam.
- DO** drink 1 – 2 glasses of water before the exam.

CORONARY, EKG ISSUES

- DO NOT** use stimulants (caffeine, alcohol, cigarettes, exercise, OTC medications) prior to exam.

URINARY SPECIMENS

- DO** empty your bladder following meals.
- DO** drink 2 – 3 glasses of water before the exam.
- DO NOT** consume any sweets or extra sugar at the meal prior to insurance exam.

SENIOR SUPPLEMENT EXAMS*

Some insurance companies may require Senior Supplement Exams for clients ages 70 or older.

- Tests vary. Generally include mobility testing and cognitive assessments.
- Stay relaxed and try to not become distracted during the exam.
- Perform exam activities and answer questions to the best of your ability.

