Warm Handoffs
A Guide for Staff

What is a warm handoff?
A warm handoff is a handoff that is conducted in person, between two members of the health care team, in front of the patient (and family if present).

Why is it important?
Warm handoffs can:
- Engage patients and families as team members.
- Allow patients to clarify or correct the information exchanged.
- Build relationships.
- Provide a safety check.

How do I conduct a warm handoff?
Whenever you need to share information about patient care, do it in person and in front of the patient. That’s all there is to a warm handoff!
You can both give and receive warm handoffs. For example:
- After you room the patient, you can use a warm handoff to present the patient to the clinician. A checklist is available to help you with this.
- After the patient exam, you can receive a warm handoff from the clinician when the patient needs additional services like immunizations, labwork, or education materials.
- You can use a warm handoff with the scheduler, lab technician, or staff who assist with referrals.

Checklist: Conducting a Warm Handoff

Present to the Clinician
☐ Reason for the visit.
☐ Patient visit goals and health concerns.
☐ Vital signs, BMI/weight, significant changes.
☐ Medication issues (e.g., refills, side effects).
☐ Updates on reports:
  ☐ Labs.
  ☐ Imaging.
  ☐ Specialist visits.
  ☐ Hospital discharge summary.

Engage the Patient
☐ What would you like to add?