

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).

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.

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.

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?

