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?