



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?

