Discharge checklist

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| At the end of the visit | |
|  | **Print and review the visit summary with the patient.**  Staff can highlight any medication changes and critical next steps of care. They can also use the teach-back method, i.e., asking patients to reiterate or describe the information previously discussed to confirm the patient’s understanding of the health care information communicated to them. |
|  | **Provide supplemental materials.**  Staff can provide additional reading materials to educate patients. |
|  | **Direct patients to the patient portal (if applicable).**  Staff can remind patients that they can always access their medical information via the patient portal and help new patients enroll in the system. |
|  | **Schedule the next visit(s) and any pre-visit laboratory tests.**  Staff can schedule the patient’s next appointment(s) and necessary laboratory tests prior to the next visit according to the protocol of each condition or as directed by the physician. |
|  | **Schedule patient referrals.**  Schedule indicated interval and preventive care and any additional testing. |
|  | **Provide patients contact information for questions or concerns.** |

*Source: AMA. Practice transformation series: implementing team-based care. 2015.*