

Your Discharge Planning Checklist:

For patients and their caregivers
preparing to leave a hospital, nursing home,
or other health care setting



NAME: _____

Reason for admission: _____

During your stay, your doctor and the staff will work with you to plan for your discharge. You and your caregiver are important members of the planning team. A caregiver is a family member or friend who may be helping you after discharge. Below is a checklist of important things you and your caregiver should know to prepare for discharge.

Instructions:

- Use the checklist early and often during your stay.
- Talk to your doctor and the staff (for example, a discharge planner, social worker, or nurse) about the items on the checklist.
- Check the box next to each item when you and your caregiver complete it. 
- Use the notes column to write down important information like names and phone numbers.
- Skip any items that don't apply to you.

ACTION ITEMS	NOTES
What's Ahead?	
☐ Ask where you will get care after discharge. Do you have options? Be sure you tell the staff what you prefer.	
☐ If a family member or friend will be helping you after discharge, write down the name and phone number.	
Your Condition	
☐ Ask the staff about your health condition and what you can do to help yourself get better.	
☐ Ask about problems to watch for and what to do about them. Write down a name and phone number to call if you have problems.	

ACTION ITEMS

NOTES

- ☐ Use the space called “My Drug List” to write down your prescription drugs, over-the-counter drugs, vitamins, and herbal supplements.
- ☐ Review the list with the staff.
- ☐ Tell the staff what drugs, vitamins, or supplements you took before you were admitted. Ask if you should still take these after you leave.
- ☐ Write down a name and phone number to call if you have questions.

Recovery and Support

- ☐ Ask if you will need medical equipment (like a walker). Who will arrange for this? Write down where to call if you have questions about equipment.
- ☐ Ask if you’re ready to do the activities listed below. Circle the ones you need help with and tell the staff.
 - Bathing, dressing, using the bathroom, climbing stairs
 - Cooking, food shopping, house cleaning, paying bills
 - Getting to doctors’ appointments, picking up prescription drugs
- ☐ Ask the staff to show you and your caregiver any other tasks that require special skills like changing a bandage or giving a shot. Then, show them you can do these tasks. Write down a name and phone number to call if you need help.
- ☐ Ask to speak to a social worker if you’re concerned about how you and your family are coping with your illness. Write down information about support groups and other resources.
- ☐ Talk to a social worker or your health plan if you have questions about what your insurance will cover, and how much you will have to pay. Ask about possible ways to get help with your costs.

ACTION ITEMS	NOTES
☐ Ask for written discharge instructions that you can read and understand and a summary of your current health status. Bring this information and your drug list with you to your follow-up appointments.	
☐ Use the space called “My Appointments” to write down any appointments and tests you will need in the next several weeks.	
For the Caregiver	
☐ Do you have any questions about the items on this checklist? Write them down and discuss them with the staff.	
☐ Can you give the patient the help he or she needs?	
☐ Talk to the staff about your concerns.	
☐ Write down a name and phone number to call if you have questions.	
☐ Get prescriptions and any special diet instructions early, so you won’t have to make extra trips after discharge.	

If you need help choosing a home health agency or a nursing home, talk to the staff. Visit **www.medicare.gov** to compare the quality of nursing homes, home health agencies, dialysis facilities, and hospitals in your area. You can also call 1-800-MEDICARE (1-800-633-4227). TTY users should call 1-877-486-2048.

Medicare Discharge Appeal Rights: If you have **Medicare** and feel you’re being asked to leave a hospital or other health care setting too soon, you may have the right to ask for a review of the discharge decision by an independent reviewer called a Quality Improvement Organization (QIO) before you leave. The QIO can explain your appeal rights. To get the number for the QIO in your state, call 1-800-MEDICARE.

*This publication isn’t a legal document. The official Medicare Program legal guidance is contained in the relevant statutes, regulations, and rulings. The information in this publication was correct when it was printed. Call 1-800-MEDICARE, or visit **www.medicare.gov** to get the most current information.

My Drug List as of (date): _____

Include prescription drugs, over-the-counter drugs, vitamins, and herbal supplements.

DRUG NAME	WHAT IT DOES	DOSE	HOW TO TAKE IT	WHEN TO TAKE IT	NOTES

My Appointments

APPOINTMENTS AND TESTS	DATE	PHONE NUMBER

Resources

The agencies listed here have information on community services, like home-delivered meals and rides to appointments. You can also get help making long-term care decisions. Ask a social worker in your health care setting for more information on community services and support.



Area Agencies on Aging (AAAs): Help adults age 60 and older and their caregivers. To find the AAA in your area, call The Eldercare Locator at 1-800-677-1116 weekdays from 9:00 a.m. to 8:00 p.m. (EST), or visit www.eldercare.gov.

Aging and Disability Resource Centers (ADRCs): Offer resources to help people of all incomes and ages stay independent. Visit www.adrc-tae.org.

Centers for Independent Living (CILs): Help people with disabilities live independently. For a state-by-state directory of CILs, visit www.ilru.org/html/publications/directory/index.html.

State Technology Assistance Project: Has information on medical equipment and other assistive technology. Call 1-703-524-6686 to get the contact information for your state, or visit www.resna.org.

National Long-Term Care Clearinghouse: Provides information and resources to plan for your long-term care needs. Visit www.longtermcare.gov.

National Council on Aging: Provides information about programs that help pay for prescription drugs, utility bills, meals, health care, and more. Visit www.benefitscheckup.org.

State Health Insurance Assistance Programs (SHIP): Offer counseling on health insurance and programs for people with limited income. Also help with claims, billing, and appeals. Visit www.medicare.gov/contacts/Default.aspx, or call 1-800-MEDICARE (1-800-633-4227) to get the number of the SHIP in your state. TTY users should call 1-877-486-2048.

State Medical Assistance (Medicaid) office: Provides information about Medicaid. To find your local office, call 1-800-MEDICARE and say, "Medicaid." You can also visit www.medicare.gov.

Medicare: For more information about what Medicare covers, call 1-800-MEDICARE, or visit www.medicare.gov.