

Yale New Haven Medical Center

Checklist for ensuring and monitoring effective, structured handover processes

Date assessed ___/___/_____

Assessment by (name/service): _____

Evaluation of (location, unit, team or setting): _____

	<i>Please choose the appropriate box</i>		
	YES	NO	NA
There is a standardized process in place that is routinely followed			
There is consistent opportunity for questions			
The necessary artifacts are available to support the handoff (including, for instance, written sign-out materials, access to electronic clinical information)			
A quiet setting free of interruptions is consistently available, for handoff processes that include face-to-face communication			
Patient confidentiality and privacy are ensured in accordance with HIPAA guidelines			

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Oral Sign-Out Evaluation

Date ___/___/___ Time _____ Location _____

Completed by (name/service): _____

Evaluation of (name/service): _____

	<i>Please choose the appropriate box</i>		
<u>VERBAL HANDOFF</u>	YES	NO	NA
The sign-out is face to face?			
The sign-out took place in a setting free of interruptions and distracting noises?			
Use of concise, concrete, closed-loop language?			
Code status is mentioned if the patient is not full code?			
Highlights sickest patients?			
Specifies the clinical condition of each patient?			
Includes general hospital course?			
Specifies relevant new events?			
Includes up-to-date task list?			
Anticipatory guidance and rationale provided?			
Provides opportunity for read-back and questions?			
Is there an accompanying written signout?			
<u>RECEIVER EVALUATION</u>			
Did the receiver take notes?			
Did the receiver ask questions?			
Did the receiver confirm understanding?			

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Written Sign-Out Evaluation

Date ___/___/___ Time _____ Location _____

Completed by (name/service): _____

Evaluation of (name/service): _____

	<i>Please choose the appropriate box</i>		
WRITTEN HANDOFF	YES	NO	N/A
Is there an accompanying oral sign-out?			
<i>If yes:</i>			
o Is oral sign-out completely consistent with written sign-out?			
Is sign-out written as part of EMR (versus a Word document or hand-written)?			
Does sign-out include primary outpatient physician?			
Does sign-out include diagnosis (or symptoms on admission if diagnosis not yet known)?			
Does sign-out include general hospital course?			
Does sign-out include new events that day?			
Does sign-out include overall health status that day (including vital signs, symptoms, physical exam findings, lab or procedure results, and/or stability)?			
Does sign-out include anticipatory guidance with if/then statements?			
Is task list present (or "nothing to do" is included)?			
Is each separate issue separated by a different paragraph or easily distinguished?			
Are actual dates (rather than ambiguous references) used?			
Is sign-out updated?			
Is wording concise?			
<i>If evaluator is familiar with patient:</i>			
• Is sign-out accurate?			
• Is sign-out comprehensive?			