

Warm Handoffs

A Guide for Clinicians

What is a warm handoff?

A warm handoff is a handoff that is conducted **in person**, between two members of the health care team, **in front of the patient** (and family if present).

How do I conduct a warm handoff?

Whenever you need to share information about patient care, do it in person and in front of the patient.

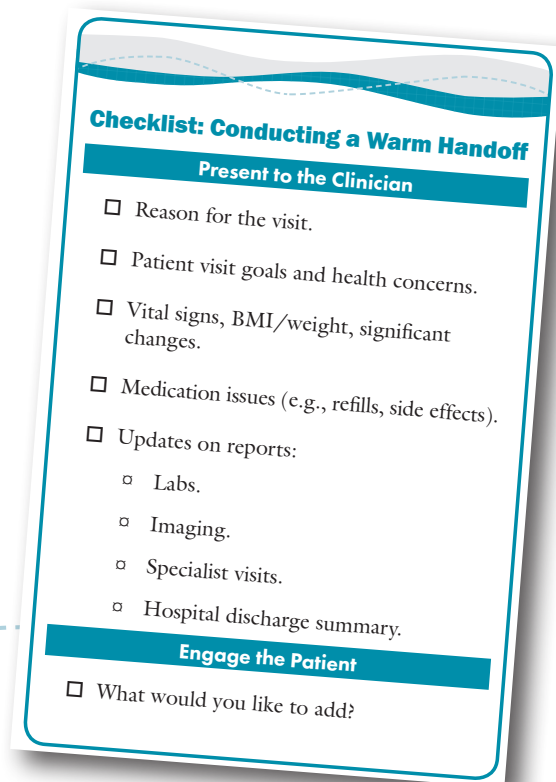
You can both give and receive warm handoffs. For example:

- After your staff has roomed the patient, the staff member can use a warm handoff to present the patient to you. A checklist is available to help with this.
- After you complete the clinical exam, you can use a warm handoff if additional patient services such as labs or immunizations are needed.
- You can use a warm handoff with extended care team members such as a diabetes educator or pharmacist and with specialists.

Why is it important?

Communication breakdowns can result in medical errors. Warm handoffs can help address communication issues and:

- Engage patients and families and encourage them to ask questions.
- Allow patients to clarify or correct the information exchanged.
- Build relationships.
- Provide a safety check.



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?

