

Your discharge planning checklist:

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



Medicare

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 (a family member or friend who may be helping you) are important members of the planning team. You can use this checklist to prepare for your discharge.

Instructions:

- Use this checklist throughout your stay.
- Talk to your doctor and the staff (like a discharge planner, social worker, Ombudsman, or nurse) about the items on this checklist.
- Check the box next to each item when you 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
Your health Throughout the discharge process, write down the names and phone numbers of people to call if you have questions or concerns.	
☐ Ask about complications to watch for and what to do about them.	
☐ Use the "My drug list" on page 5 to write down the full list of prescription drugs, over-the-counter drugs, vitamins, and herbal supplements that you take. Be sure to include items that you took at home, and note any changes or additions while you were in the facility.	
☐ Review the "My drug list" with the staff and ask which items and dosage (or strength) you should continue to take after you leave. Share this updated drug list with your healthcare providers.	

Action items	Notes
Recovery & support ☐ Ask where you'll get care after you're discharged. Do you have options (like home health care)? Tell the staff what you prefer. ☐ Ask if you'll need medical equipment (like a walker), if it's covered by Medicare, and who will arrange for its delivery. ☐ Ask if you're ready to do the activities below. Circle the ones you need help with, and discuss your concerns with the staff: • Bathing, dressing, using the bathroom, climbing stairs • Cooking, food shopping, house cleaning, paying bills • Driving to doctors' appointments, picking up prescriptions ☐ Ask the staff to show you and your caregiver, if you have one, any other tasks that require special skills (like changing a bandage or giving a shot). Then, show them you can do these tasks. ☐ Talk 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'll have to pay. Ask about possible ways to get help with your costs. ☐ Ask for written discharge instructions (that you can read and understand) and a summary of your current health status. Bring this information and your completed "My drug list" to your follow-up appointments.	

Action items	Notes
For a caregiver	
☐ Write down any questions you have about the items on this checklist or the discharge instructions and discuss them with the staff.	
☐ Can you give the patient the help they need? • What tasks do you need help with? • Do you need any education or training? • Talk to the staff about getting the help you need before discharge. • Write down the name and phone number of a person you can call if you have questions.	
☐ Get prescriptions and any special diet instructions early, so you won't have to make extra trips after discharge.	

More information for people with Medicare

If you need help choosing a home health agency or nursing home:

- Talk to the staff.
- Visit [Medicare.gov/care-compare](https://www.medicare.gov/care-compare) to compare the quality of home health agencies, nursing homes, dialysis facilities, inpatient rehabilitation facilities, and hospitals in your area.
- Call 1-800-MEDICARE (1-800-633-4227). TTY users can call 1-877-486-2048.

If you think you're being asked to leave a hospital or other health care setting (discharged) too soon:

You can ask for a fast appeal. Your provider will give you a notice called a Notice of Medicare Non-Coverage before your services end, telling you how to ask for a fast appeal. You should read this notice carefully. If you don't get this notice, ask for it.

With a fast appeal, an independent reviewer under contract with Medicare, called a Beneficiary and Family Centered Care-Quality Improvement Organization (BFCC-QIO), will review the discharge decision and determine if your covered services should continue. You can also ask the BFCC-QIO questions or report complaints about the quality of care you got for a Medicare-covered service.

If you're in a hospital, the staff should give you a notice called "Important Message from Medicare," which contains information on your BFCC-QIO. If you don't get this notice, ask for it. You can also visit [QIOprogram.org/locate-your-bfcc-qio](https://qioprogram.org/locate-your-bfcc-qio) or call 1-800-MEDICARE to get the phone number of your BFCC-QIO.

For more information on your right to appeal, visit [Medicare.gov/claims-appeals/how-do-i-file-an-appeal](https://www.Medicare.gov/claims-appeals/how-do-i-file-an-appeal).

My drug list

Filled out on: _____

Use the space below to list all prescription drugs, over-the-counter drugs, vitamins, and herbal supplements you take.

Drug name	What it does	Dose	How to take it	When to take it
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.
				☐ A.M. ☐ P.M.

If you have Medicare and limited income and resources, you may qualify for programs to help pay your health and drug costs. For more information, visit [Medicare.gov/basics/costs/help](https://www.medicare.gov/basics/costs/help).

My appointments

Use this space to write down the dates and times of your upcoming appointments.

Appointment	Date	Time

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.

Area Agencies on Aging (AAAs) & Aging and Disability Resource Centers (ADRCs)

Help older adults, people with disabilities, and their caregivers. To find the AAA or ADRC in your area, visit the Eldercare Locator at [Eldercare.acl.gov](https://eldercare.acl.gov), or call 1-800-677-1116.

Medicare

Provides information to caregivers and people with Medicare. Visit [Medicare.gov](https://www.Medicare.gov) or call 1-800-MEDICARE.

Long-Term Care (LTC) Ombudsman Program

Advocates for and promotes the rights of residents in LTC facilities. Visit [LTCombudsman.org](https://www.LTCombudsman.org).

Senior Medicare Patrol (SMP) Programs

Work with seniors to protect themselves from the economic and health-related consequences of Medicare and Medicaid fraud, errors, and abuse. To find a local SMP program, visit [SMPresource.org](https://www.SMPresource.org) or call 1-877-808-2468.

Centers for Independent Living (CILs)

Help people with disabilities live independently. For a state-by-state directory of CILs, visit [ILRU.org/html/publications/directory/index.html](https://www.ILRU.org/html/publications/directory/index.html).

State Technology Assistance Project

Has information on medical equipment and other assistive technology. Visit [RESNA.org](https://www.RESNA.org), or call 1-202-367-1121 to get the contact information in your state.

National Long-Term Care Clearinghouse

Provides information and resources to plan for your long-term care needs. Visit [ACL.gov/ltc](https://www.ACL.gov/ltc).

National Council on Aging

Provides information about programs that help pay for prescription drugs, utility bills, meals, health care, and more. Visit [BenefitsCheckup.org](https://www.BenefitsCheckup.org).

State Health Insurance Assistance Programs (SHIPs)

Offer free counseling on health insurance and programs for people with limited income. Also help with claims, billing, and appeals. Visit [SHIPhelp.org](https://www.SHIPhelp.org), or call 1-800-MEDICARE (1-800-633-4227) to get your SHIP's phone number. TTY users can call 1-877-486-2048.

Medicaid

Helps cover medical costs for some people with limited income and resources. To find your local office, visit [Medicaid.gov/about-us/beneficiary-resources/index.html#statemenu](https://www.Medicaid.gov/about-us/beneficiary-resources/index.html#statemenu), or call 1-800-MEDICARE.



Medicare

You have the right to get Medicare information in an accessible format, like large print, braille, or audio. You also have the right to file a complaint if you feel you've been discriminated against. Visit [Medicare.gov/about-us/accessibility-nondiscrimination-notice](https://www.Medicare.gov/about-us/accessibility-nondiscrimination-notice), or call 1-800-MEDICARE (1-800-633-4227) for more information. TTY users can call 1-877-486-2048.

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