

Transition Care Team Checklist

Information needed to start the BWH Transition Process:

To build a standardized Transition Transfer Packet for your patient, we would ask that you and/or your office provide the following:

- Patient one-liner (please include verbal/nonverbal and ambulatory/home-bound)
- Patient's legal guardianship status and primary language
- Patient's insurance information including subscriber number, OR consent for us to contact the patient to obtain this information
- Copy of most recent annual exam notes and most recent sub-specialist notes
- Additional supplementary information as outlined in our attached checklist

We ask that you also have your office provide the following supplementary information:

- List of patient's active/important diagnoses ***if not already included in the annual exam note**
- List of home medications and allergies ***if not already included in the annual exam note**
- List of prior surgeries/procedures ***if not already included in the annual exam note**
- List of all specialists (with their email addresses, if not within the MGB system) following the patient, as well as copies of each of their most recent office visit notes
- List of major action items (planned procedures, referrals, testing; e.g. needs echocardiogram yearly, awaiting genetics eval, colonoscopy q3y, etc.) ***if not already included in the annual exam note**

If readily available to you, please provide the following. Otherwise, we will obtain the information directly from the patient/family later:

- List of home equipment (DME) and names of DME supply companies, if appropriate/available
- List of home services and names of agencies, if appropriate/available
- State services/agencies involved (DDS, DPH, DMH, MCB, MCDHH), if appropriate/available
- Number of ED and urgent visits in the past 12 months
- Patient's living situation and educational/vocational situation ***if not already included in the annual exam note**

Notes on documentation requirements:

1. If you do not have some of these items, please send what you have.
2. Many of the above items may already be included in the last annual exam note. If so, there is no need to list/send them separately.
3. Documents can be sent individually or together via our email:
bwhtransitioncareteam@BWH.HARVARD.EDU