

HOME HEALTH SKILLED VISIT END-OF-VISIT REVIEW SHEET

A quick final review before leaving the home

Use this review sheet near the end of a skilled nursing visit to help confirm that important clinical, teaching, safety, communication, and follow-up needs were addressed.

Not every item applies to every visit. Review the areas relevant to the patient's condition, provider orders, plan of care, and today's skilled visit focus.

1. Current Condition

- ☐ Were important current symptoms, complaints, or changes assessed?
- ☐ Were relevant Vital Signs, measurements, or ordered monitoring reviewed when applicable?
- ☐ Was the patient's current condition compared with baseline or the prior visit when clinically relevant?
- ☐ Were new, worsening, or unexpected findings further assessed as appropriate?

2. Skilled Care Completed

- ☐ Were the ordered or planned skilled nursing interventions for today completed when applicable?
- ☐ Were treatment, wound, disease-management, monitoring, or other skilled care needs addressed based on today's visit focus?
- ☐ Were medication-related concerns reviewed when relevant?
- ☐ If an ordered service or intervention could not be completed, was the reason identified and appropriate follow-up initiated?

3. Teaching and Patient/PCG Understanding

- ☐ Was the most important teaching or reinforcement need addressed?
- ☐ Was teaching individualized to the patient's current condition, risks, medications, treatment, or care needs?
- ☐ Was patient/PCG understanding checked using teach-back, demonstration, questions, or another appropriate method when applicable?
- ☐ Were confusion, learning barriers, difficulty following instructions, or need for continued reinforcement identified?

4. Safety and Escalation

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| <ul style="list-style-type: none"> ☐ Were new or ongoing safety concerns identified and addressed when applicable? ☐ Were abnormal or concerning findings acted on appropriately? | <ul style="list-style-type: none"> ☐ Was the PCP/provider, agency, or appropriate care team member notified when indicated? ☐ Was emergency escalation addressed when clinically necessary? ☐ Does the patient/PCG understand which important changes or concerns should be reported and who to contact? |
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For an apparent emergency, follow agency emergency protocol and activate EMS or call 911 when clinically indicated. Do not delay emergency care for routine provider notification.

5. Medications and Supplies

When relevant to today's visit:

- ☐ Are prescribed medications available?
- ☐ Are there refill, side-effect, adherence, medication-list, or medication-management concerns requiring follow-up?
- ☐ Are needed wound supplies, respiratory supplies, treatment supplies, equipment, or other ordered items available?
- ☐ Are there supply or equipment problems that may interfere with safe care before the next visit?

6. Follow-Up Needs

- ☐ Are there unresolved symptoms, abnormal findings, safety concerns, medication issues, or treatment concerns requiring continued monitoring?
- ☐ Are provider instructions or new orders addressed when applicable?
- ☐ Are pending labs, referrals, appointments, equipment needs, or other follow-up items identified?
- ☐ Is there an issue that needs communication to another discipline, the agency, PCP/provider, or other appropriate care team member?
- ☐ Is the next skilled visit focus reasonably clear based on today's findings and remaining needs?

7. Patient/PCG Plan After the Visit

Before leaving, consider whether the patient or PCG understands:

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| ☐ What needs to be done after the nurse leaves | ☐ Who to contact for routine or urgent concerns |
| ☐ Important medications, treatments, precautions, or monitoring instructions reviewed today | ☐ When emergency help or 911 may be needed, when applicable |
| ☐ What symptoms or changes should be reported | ☐ Any immediate provider instructions or follow-up plan |

8. Final Before-Leaving Check

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| ☐ Immediate safety concerns identified during the visit have been addressed or appropriately escalated when applicable. | ☐ Immediate questions or concerns raised during the visit have been addressed or an appropriate follow-up plan is in place. |
| ☐ Necessary frequently used items, communication devices, mobility aids, or other appropriate items are within reach when needed. | ☐ Important communication or escalation needed before leaving has been completed. |
| | ☐ Patient/PCG understands the immediate next steps as appropriate. |

Quick Final Review

Before leaving the home, ask:

Did I address the main skilled need for today?

Is there anything concerning that still requires action or communication?

Does the patient or PCG know what to do next?

Is there a clear plan for unresolved needs and the next skilled visit?

If something important remains unresolved, determine what additional assessment, communication, teaching, escalation, or follow-up is appropriate before closing out the visit.

Important Use Note

This review sheet is provided for general educational purposes and should be individualized to the patient's condition, assessment findings, provider orders, plan of care, services actually provided, patient/PCG needs and response, agency policies and procedures, payer requirements, applicable laws and regulations, and skilled nursing judgment.

This resource does not replace provider orders, patient-specific instructions, agency visit requirements, agency emergency protocols, professional standards, or clinical judgment. Not every checklist item applies to every patient or every skilled nursing visit.