Make shift handoffs clear and consistent

A practical checklist for transferring essential information and confirming ownership. Use your facility's approved handoff process and secure records.

Before the handoff

☐ Confirm who is giving and receiving the handoff and allow protected time.
☐ Review current information in approved records; separate observed facts from interpretation.
☐ Escalate urgent concerns through the facility protocol immediately. Do not wait for a routine handoff.

During the handoff

☐ **Current needs:** Identify immediate priorities and relevant changes since the previous shift.
☐ **What changed:** Communicate factual updates and current directions from authorized staff.
☐ **What is pending:** Name unfinished tasks, scheduled commitments, and required follow-up.
☐ **Who owns it:** Assign a responsible role or person and a deadline for each priority task.
☐ **What needs clarification:** Identify missing information and who will resolve it.

Confirm understanding

☐ Ask the incoming staff member to summarize priority actions in their own words.
☐ Resolve differences, clarify uncertainty, and confirm coverage or assignments.
☐ Identify the supervisor or authorized contact for questions and escalation.

After the handoff

☐ Update required records in the approved system; record unresolved items and their owners.
☐ Confirm follow-through at the agreed time instead of assuming the task was completed.
☐ Share improvements to the process through supervision without identifying residents in public materials.

Keep information where it belongs. Share resident-specific information only with authorized staff through approved channels. This checklist does not replace care plans, medication records, incident documentation, reporting duties, or emergency procedures.

A quick handoff review

Use this page to review the process, not to create a separate resident record. Keep resident-specific details in your facility's approved system.

Date and shift pair being reviewed

Process question	Yes / Needs attention / Not applicable
Were current priorities communicated factually?	
Were pending actions assigned an owner and deadline?	
Did incoming staff summarize priority actions?	
Were unresolved questions assigned for follow-up?	
Was required documentation completed in the approved system?	
Was follow-through checked at the agreed time?	

One part of the handoff that worked well

One process gap or barrier to address - omit resident-identifying details

Agreed adjustment - person responsible - review date

Review a small sample of handoffs to identify patterns. An unchecked item is a prompt for clarification; it is not, by itself, evidence of staff misconduct.

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