

Transition of Care Planner

Purpose

A comprehensive tool designed to organize and track medical records, provider details, and care plans during transitions between clinical centers. This planner ensures continuity of care, minimizes information loss, and supports effective communication among healthcare providers.

Patient Information

Field	Details
Full Name	
Date of Birth	
Medical Record Number	
Primary Diagnosis	
Allergies	
Emergency Contact	

Current Care Facility

Field	Details
Facility Name	
Address	
Phone Number	
Primary Physician	
Specialists Involved	
Case Manager	
Date of Admission	
Expected Transfer Date	

Receiving Care Facility

Field	Details
Facility Name	
Address	
Phone Number	
Receiving Physician	
Specialists Assigned	
Case Manager	
Date of Transfer	

Medical Records Checklist

Record Type	Available (Y/N)	Date Sent	Notes
Discharge Summary			
Medication List			
Lab Results			
Imaging Reports			
Progress Notes			
Consultation Reports			
Care Plan			
Advance Directives			

Approved Individuals To Speak to Doctors

Name	Role	Signature	Date

Usage

This planner can be maintained digitally or in print form. It serves as a centralized record to ensure all relevant medical, administrative, and communication details are accurately transferred and accessible during care transitions.