



Discharge Organization Workbook

A printable guide for turning a stressful care transition into visible documents, questions, appointments, and owned next steps.

What this workbook helps you do

- [] Collect the discharge and after-visit source documents in one working set.
- [] Separate clear instructions from questions requiring confirmation.
- [] Track appointments, calls, referrals, forms, pickups, and document requests.
- [] Keep medication changes visible for qualified professional review.
- [] Prepare the next visit with unresolved questions and source material ready.

A simple way to use it

- [] Work from the information and source material available to you.
- [] Leave uncertain or conflicting details visible for review.
- [] Use the worksheets before, during, and after the care moment as appropriate.
- [] Transfer selected information into CareTrove only when you choose.

Important boundary

This workbook supports organization and human review. It does not provide medical advice, diagnosis, treatment, medication guidance, emergency monitoring, or professional care instructions. Check important details against source documents and qualified professionals. Store completed pages securely and share only selected information.

Comprehensive checklist

Check the items that apply to the current situation. Skip anything that is not relevant, and keep questions open when a source or qualified professional still needs to confirm them.

1. Source documents

- ☐ Collect discharge papers, after-visit summaries, referrals, and follow-up instructions.
- ☐ Record where the original documents are stored.
- ☐ Date user-entered notes and keep them distinct from official records.
- ☐ Identify missing pages, unclear copies, or documents that must be requested.
- ☐ Keep source-provided urgent or emergency instructions easy to locate.

2. Instructions and open questions

- ☐ Copy clear next steps without changing their meaning.
- ☐ Mark unclear instructions instead of guessing.
- ☐ List medication changes and questions for qualified professional review.
- ☐ Record tests, symptoms, or monitoring instructions only from the source material available to you.
- ☐ Identify the professional or service to contact for each open question.

3. Practical follow-up

- ☐ List appointments, tests, referrals, therapy, home care, and transportation needs.
- ☐ Add calls, pickups, forms, insurance items, and document requests.
- ☐ Assign one owner and a due date to each practical action.
- ☐ Record accessibility, equipment, or home logistics when relevant.
- ☐ Keep family updates selected and appropriate to each recipient.

4. Next review point

- ☐ Prepare the current medication context and open questions before the next visit.
- ☐ Bring the most relevant discharge and follow-up documents.
- ☐ Review what was completed, changed, delayed, or left unresolved.
- ☐ Update ownership when the original plan no longer fits.
- ☐ Do not treat this workbook as emergency monitoring or clinical guidance.

Working worksheet

Use these fields as a private working page. Store completed pages securely and avoid sending them through CareTrove website forms.

Discharge date, location, and source document set

Clear instructions copied from available sources

Questions or conflicts requiring confirmation

Medication changes or questions for professional review

Appointments, referrals, services, or tests

Documents, equipment, forms, pickups, or calls needed

People who may need a selected update

30-day transition tracker

Use one row for each action. Review the table regularly and keep delayed or unresolved work visible.

Action or question	Owner	Due	Status

Review before closing this work

- ☐ I can find the original discharge and after-visit documents.
- ☐ Unclear instructions and medication questions are marked for confirmation.
- ☐ Every practical follow-up has an owner and review date.
- ☐ The next visit packet includes only relevant, reviewed information.

CareTrove connection

CareTrove can help organize selected records, documents, questions, tasks, and packet outputs around a care profile. Review information before use, and choose deliberately what leaves the private workspace.

Source and review log

Use this page to keep important details connected to their source and review status. A saved detail can remain unresolved until the right confirmation is available.

Source or document	Date	Detail to verify	Reviewed

Review prompts

- [] Which source document supports this instruction?
- [] Who should confirm this unresolved question?
- [] What has changed since discharge?
- [] What must be ready before the next appointment?

Additional notes

Notes, questions, changes, or items to revisit

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