Transition planning checklist

To be filed in front of personal record

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **At entry:** | | | **Initials and date of completion** |  |
|  | ⬜ | GP contact details recorded |  |  |  |
|  |  | | | |  |
|  | ⬜ | Information provided re PHO enrolment for those not currently enrolled |  |  |  |
|  |  | | | |  |
|  | ⬜ | Goals agreed and documented |  |  |  |
|  |  | | | |  |
|  | ⬜ | Information sharing plan documented |  |  |  |
|  |  | | | |  |
|  | ⬜ | Summary letter sent to young person |  |  |  |
|  |  | | | |  |
|  | ⬜ | Copy of summary letter sent to GP and other agreed stakeholders |  |  |  |
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|  | **During engagement:** | | | | |  |
|  | **Activity** | Initials and date of completion | Initials and date of completion | Initials and date of completion | Initials and date of completion |  |
|  | Transition goals / plans updated |  |  |  |  |  |
|  | Summary letter sent to young person |  |  |  |  |  |
|  | Copy of letter sent to GP / other stakeholders |  |  |  |  |  |
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|  | **At time of transition:** | | | **Initials and date of completion** |  |
|  | ⬜ | Transition planning meeting with young person and family/whānau |  |  |  |
|  |  | | | |  |
|  | ⬜ | Transition plan developed |  |  |  |
|  |  | | | |  |
|  | ⬜ | Meeting/conversation with new service (where needed) |  |  |  |
|  |  | | | |  |
|  | ⬜ | Follow-up phone call/s to young person (where needed) |  |  |  |
|  |  | | | |  |
|  | ⬜ | Letter sent to young person |  |  |  |
|  |  | | | |  |
|  | ⬜ | Copy of letter sent to GP (and other key stakeholders) |  |  |  |
|  |  | | | |  |
|  | ⬜ | Transition documentation completed |  |  |  |
|  |  | | | |  |