

PRINTABLE FLOW TOOL

Flow Tool 12: Flow Maintenance Checklist Beyond 90 Days

PRINTABLE
VERSION

Use this page at the interval you and your clinician choose. Long-term follow-up depends on diagnoses, medicines, recent events, and symptoms.

Symptoms and Function

- ☐ New or changing chest discomfort, breathlessness, palpitations, faintness, swelling, fatigue, or exercise limitation reviewed
- ☐ Daily function, work, driving, intimacy, and activity concerns discussed when relevant
- ☐ Emergency and same-day call instructions still understood

Medicines

- ☐ Medication list reconciled with what I actually take
- ☐ Purpose and intended duration of each medicine reviewed
- ☐ Side effects, cost, refills, missed doses, and access problems discussed
- ☐ Sick-day and procedure instructions recorded when needed
- ☐ Over-the-counter medicines and supplements reviewed for interactions

Flow Tool 12: Flow Maintenance Checklist Beyond 90 Days

Measurements and Monitoring

- ☐ Home blood-pressure average reviewed if monitoring was assigned
- ☐ Lipid testing completed when due
- ☐ Kidney function and blood salts such as sodium and potassium checked for medicines or conditions that require them
- ☐ If applicable, A1c or another blood sugar measure reviewed along with related heart, kidney, or metabolic conditions
- ☐ Heart-failure weight or fluid plan reviewed if applicable

Recovery and Prevention

- ☐ Support and treatment for stopping tobacco or nicotine use reviewed if applicable
 - ☐ Cardiac rehabilitation, activity, strength, balance, or fall concerns reviewed
 - ☐ Sleep-apnea evaluation or treatment reviewed if applicable
 - ☐ Mood, anxiety, trauma symptoms, and social support discussed
 - ☐ Nutrition goals fit my diagnoses, culture, preferences, and access to food
-

PRINTABLE FLOW TOOL

Page 3 of 3

Flow Tool 12: Flow Maintenance Checklist Beyond 90 Days

Closing the Loop

- ☐ I know who will review each pending referral, test, or result
- ☐ I understand why repeat imaging is planned and how the result could change care
- ☐ Next review date is written down
- ☐ I know which change should prompt an earlier call

What continues: _____

What changes: _____

Next review date: _____

If symptoms are new or worsening, do not wait for the next scheduled review. If an emergency feature is present, call 911; otherwise contact your clinician promptly.