

Willowmere Home Health & Hospice

88 Meadow Lane, Riverbend, ST 58024
Intake 555-0460 · Clinical after-hours 555-0461 · Equipment 555-0462
willowmerehome.example · Office hours Mon–Fri 8:00a–5:00p

PATIENT FOLDER

Document

Start-of-care patient folder

Owner

Clinical Manager, Home Health

Version

8.2 · Approved 01/15/2027

Intake

555-0460

Your First Home Health Visit

Who may come, what the start-of-care visit covers, what to have ready, your rights, and how to reach us

THIS FOLDER DOES NOT DECIDE ELIGIBILITY OR PAYMENT

Whether home health is covered, how many visits are authorized, and what you may owe are questions for your plan and for the written notices you receive separately. This folder explains the visit itself.

AGENCY Willowmere Home Health (not hospice, unless a separate team is listed)	START-OF-CARE WINDOW Typically within 48 hours of referral acceptance	FOLDER ID WM-SOC-082	CLINICAL AFTER-HOURS 555-0461
--	--	-------------------------	----------------------------------

OPEN THE FOLDER IN THIS ORDER

1. Contact card (front sleeve) — office, after-hours, equipment, and 911 reminder.
2. Who-comes sheet — disciplines that may visit in week one.
3. What we assess — so nothing on the first visit feels like a surprise.
4. What to have ready — a 15-minute tabletop setup.
5. Visit plan for week one — proposed cadence, not a guaranteed schedule.
6. Patient rights and complaint route — keep this even if you keep nothing else.
7. Signature log — you will be asked to sign that you received the folder, not that you agree with a coverage decision.

WHO MAY COME IN THE FIRST WEEK

ROLE	WHAT THEY USUALLY DO ON A FIRST VISIT	TYPICAL LENGTH	NOT THEIR JOB TODAY
Registered nurse (often first)	Reviews medicines as they are in the home, vital signs if indicated, skin and safety, and your questions	60–90 minutes	Does not approve insurance or promise a number of visits
Physical therapist, if ordered	Looks at walking, transfers, and home setup related to movement	45–60 minutes	Does not prescribe a community gym program
Occupational therapist, if ordered	Looks at bathing, dressing, and the rooms you actually use	45–60 minutes	Does not rearrange your house without your agreement
Medical social worker, if ordered	Discusses supports, forms, and community resources you ask about	45–60 minutes	Does not determine benefits
Home health aide, if ordered	Only after a nurse or therapist has set the plan and you have agreed to the tasks	Per the plan	Does not give medicines or perform a new assessment

You will be told which roles are expected before the first knock. A person without a Willowmere badge and a posted visit window should not be admitted. Call 555-0460 to verify.

WHAT IS ASSESSED (START OF CARE)

The first comprehensive visit documents how you are doing at home so a plan can be written. It is not a hospital admission and it is not a test you pass or fail.

- Who lives here and who helps
- Medicines, allergies, and how you actually take them
- Walking, transferring, bathing, and toileting as they occur in this home
- Pain, breathing, nutrition, skin, and equipment already present
- Your goals, in your words
- Who to call for which problem

Boundary: Assessment findings are not a coverage decision.

WHAT TO HAVE READY

- ☐ A table or cleared counter for the nurse's bag
- ☐ Every medicine container, including inhalers, drops, patches, and over-the-counter products
- ☐ Insurance card and photo identification, if not already on file
- ☐ A list of other clinicians and recent hospital or clinic visits
- ☐ Advance directive or healthcare-agent paperwork, if you have it (*optional*)
- ☐ The equipment you already use: walker, oxygen, glucometer, commode
- ☐ A second chair so the clinician is not perched on the bed
- ☐ The person who helps you, if you want them present

PROPOSED WEEK-ONE VISIT PLAN (SPECIMEN CALENDAR — NOT A PROMISE)

DAY	WHO	FOCUS	YOU SHOULD
Day 0 — referral accepted	Intake coordinator	Confirms address, access (gate, pets, stairs), and first-visit window	Return the call the same day if a number was missed
Day 1 — start of care	Registered nurse	Folder review, assessment, medicine walkthrough, rights	Plan 90 minutes without other appointments
Day 2–3	Therapy if ordered	Movement or self-care evaluation in the rooms you use	Wear stable shoes; keep pets secured
Day 4–5	Nurse or therapy follow-up as written	Teach-back on the two highest-priority tasks	Write questions on the refrigerator card
End of week 1	Clinical manager review (internal)	Confirms the written plan matches what was taught	You receive a copy of the plan of care once it is signed

PATIENT RIGHTS — KEEP THIS PAGE

RIGHT	WHAT IT MEANS HERE	HOW TO EXERCISE IT
Be treated with respect	Staff introduce themselves, wear identification, and ask before entering a bedroom	Ask anyone without a badge to wait while you call 555-0460
Be informed	You receive the plan of care in writing and may ask for it to be read aloud	Say if print is too small or you need an interpreter
Participate — or refuse a task	You may refuse a visit activity. Refusal is documented; it is not automatically 'noncompliance'	Tell the clinician what you are refusing and why, if you wish
Privacy	Clinical details are not discussed in a hallway, a doorway with neighbors present, or a group text	Ask visitors to step out; ask staff to close the laptop screen
Complain without retaliation	Complaints can go to the Clinical Manager or to the state agency listed on the insert	Clinical Manager 555-0460 option 8; state survey line on the rights insert
Know who is coming	A visit window is provided. Exact minute is not guaranteed because prior visits run long	Call 555-0460 if no one has arrived 30 minutes after the window ends

DOCUMENTED CONTACT ROUTES

NEED	NUMBER
Scheduling, first-visit window, 'who is this at my door?'	555-0460
Clinical concern after 5:00p or on weekends	555-0461
Equipment already on the Willowmere order	555-0462
Interpreter request in advance	555-0460 option 3
Privacy / records	555-0460 option 7
Emergency	911

VERSION AND APPROVAL

ITEM	VALUE
Document number	WM-SOC-082
Approved by	Clinical Manager A. Ruiz, RN; Administrator L. Patel
Approval date	15 January 2027
Effective	01 February 2027
Next review	January 2028
Supersedes	WM-SOC-077

FICTIONAL SPECIMEN. Willowmere Home Health & Hospice, its staff, phone numbers, visit lengths, and approval records are invented for demonstration only. This folder is not a determination of eligibility, coverage, or payment, and it is not medical advice. Do not treat it as a real agency policy.