

Age-Friendly Health Systems:

My Health Checklist: FAQs and Why This Matters

October 2025

ihi.org/AgeFriendly

"My Health Checklist FAQs and Why This Matters" supported by AARP.

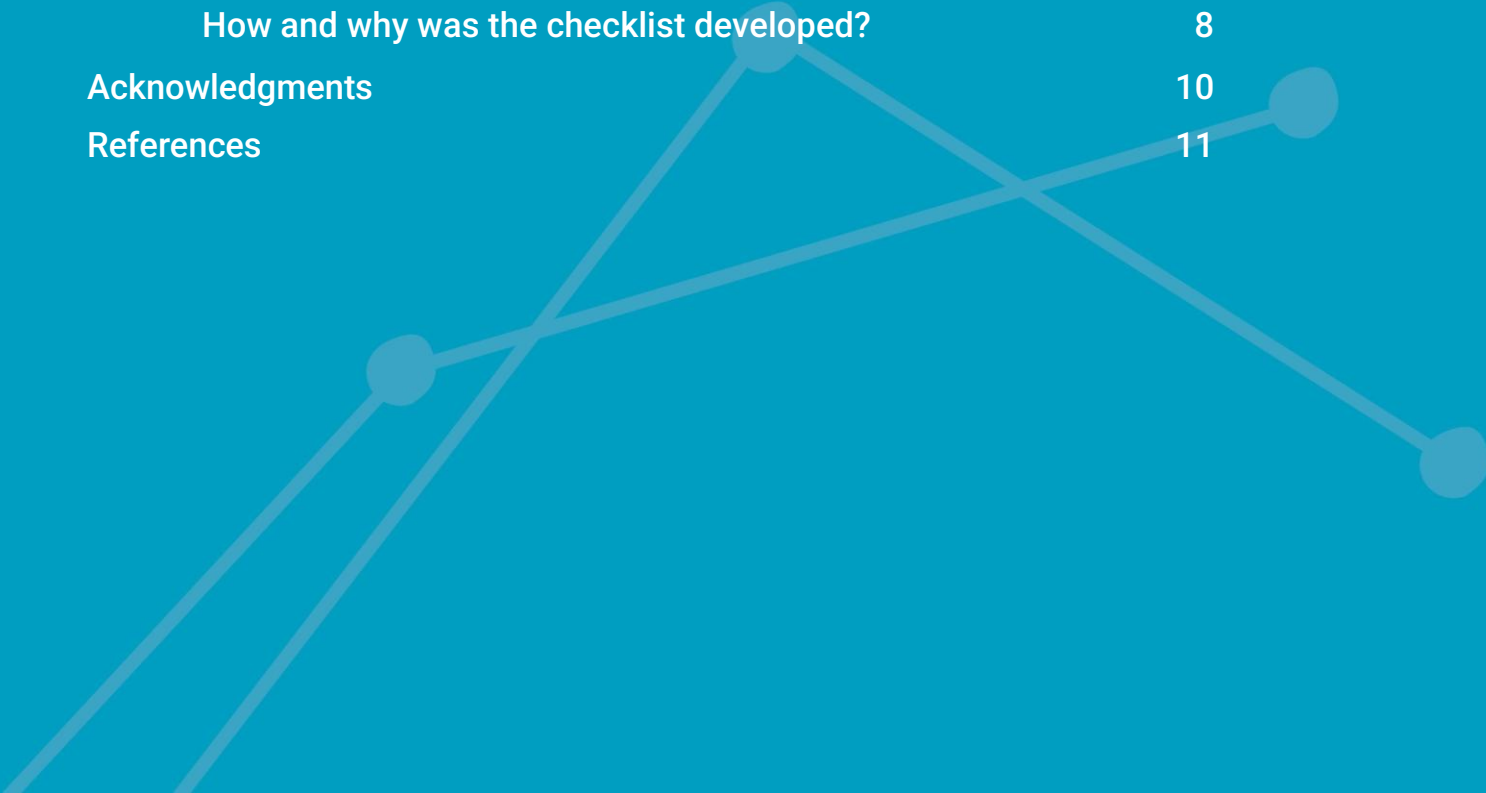
My Health Checklist was created especially for:

Age-Friendly 
Health Systems

An initiative of The John A. Hartford Foundation and the Institute for Healthcare Improvement (IHI) in partnership with the American Hospital Association (AHA) and the Catholic Health Association of the United States (CHA).



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About My Health Checklist

[My Health Checklist](#) is designed to help older adults get the most out of their medical appointments. It is meant for self-reflection and home use (though some organizations have found ways to use it before or during appointments).

My Health Checklist supports age-friendly care – care that:

- Follows an essential set of evidence-based practices, known as the 4Ms (What Matters, Medication, Mentation, and Mobility);
- Causes no harm; and
- Aligns with What Matters to the older adult

Frequently Asked Questions and Why This Matters

Why share My Health Checklist?

The checklist helps older adults think through all aspects of their health – what’s going well, what could be better, and their questions or concerns. It then helps them prioritize their top questions about what matters most to them.

Being prepared for appointments can help older adults get the care that’s right for them. They are part of the team. They can have a say in their care.

To have more efficient, effective, and productive appointments, share [My Health Checklist](#) with patients before they come in.

Prioritizing these conversations can lead to:

- Better care alignment
- Better outcomes, high-quality care
- Trust and relationship building
- More activated/prepared older adults
- Better communication/connection between older adults and the health care team

Where can I share the checklist?

The checklist can be shared and used across health care and community settings, including:

- Hospitals
- Ambulatory settings

- Primary care
- Nursing homes
- Convenient care clinics
- Assisted and independent living facilities
- Home care
- Senior centers
- Places of worship
- Libraries and other places older adults may gather or visit

Who can use the checklist? What about those needing extra assistance?

Older adults (along with a support person or caregiver, when relevant) can use the checklist to organize their thoughts about their care needs and goals. The checklist is designed for use by people with a wide range of health or life circumstances. They can use it however feels most helpful for them.

The checklist is available in English, Chinese, Portuguese, and Spanish.

Some people may prefer to complete the checklist with a support person in person or over the phone. It's always okay for older adults to skip a question. It's fine to take a break and come back later.

Many older adults with varying cognitive abilities are able to express their care needs and goals using the checklist. If you are supporting an older adult who you think may need help, ask them if they want someone to help them review the checklist. Take their lead. [For additional resources for caregivers of people with Alzheimer's or other forms of dementia, visit The Conversation Project.](#)

How can I introduce the checklist?

When talking with health care professionals and community partners:

- [Adapt this slide deck from IHI](#)
- Share a story about your own experience with the checklist

For more tips and resources, visit ihi.org/AgeFriendly and see the resource **"How to Introduce My Health Checklist to Staff."**

When talking with older adults and caregivers:

Start with asking and listening. Then, the older adult can take it with them to complete later, and then be encouraged to bring the completed checklist to a future conversation.

- When introducing the checklist, you might try one of these phrases:
 - “This is a checklist that talks about what’s important to you in your care: what matters to you, your medication, your mind, and your mobility. On the last page, you can list the top things you want to talk about together. What questions do you have about the checklist?”
 - “Being prepared for your appointment can help you get the care that’s right for you. You are part of the team. You can have a say in your care.”
 - “Here is a checklist to ensure you receive age-friendly care that promotes what matters to you and your health. Would you like a copy?” (Case Western)
 - “Knowing what matters to you help me and other members of your health care team to provide you the best care.”
- The checklist is not meant to take the place of any required intake forms you may already have. **It’s designed for at-home use and self-reflection.** Or, if you have a staff member with time available, that person can sit with the older adult and support them to complete the checklist if the older adult wants help.

For more tips and resources, visit ihi.org/AgeFriendly and see the resource “**How to Introduce My Health Checklist to Older Adults.**”

How can I prepare to talk with an older adult who brings a completed checklist?

- Start with asking and listening.
 - When an older adult has completed the checklist, you might say: “Thank you for taking the time prepare for our conversation. Let’s look at the last page with your top concerns. What are your most important questions for today?”
- Then ask yourself:
 - **What** can I do in this appointment to address these goals and integrate What Matters into the care plan?
 - **With whom** can I share this information (e.g., team members, referrals)?
 - **How** can I remember what I learned in this conversation when I talk with this person next?
- Next, take action
 - Document what matters to the older adult.
 - Write down what you learned in the conversation in the electronic health record or on paper. Use the person’s own words as much as possible (e.g., “I would like to be able to walk around the block” rather than “Patient wants to mobilize”).

- Share this information with the care team. Make sure care team members know where this information is stored and access it
- Integrate into the plan of care. Then, review the care plan with the older adult to check if it aligns with what matters.
- Ask for feedback.
- Strengthen relationships with all older adults.
- Spread what works.

When can I share the checklist?

You can share the checklist at many different moments, including:

- Mail hardcopies to older adults before their appointments
- Hand a copy to an older adult at the end of an appointment for them to use at the next visit
- Introduce the checklist at the “Welcome to Medicare” visit
- Include the checklist in the electronic portal
- Use as a handout in the lobby during awareness events
- Leave copies in the waiting room

How will this checklist change health care appointments?

The checklist is designed to help older adults prioritize their top questions. By organizing their thoughts in advance of a health care conversation, they can have more productive and efficient conversations – whether or not the provider is familiar with the checklist. Focusing on what matters to the older adult is key to providing evidence-based [age-friendly care](#).

On the final page of the checklist, older adults are encouraged to list up to 3 top questions or concerns. Having these top questions prepared at the start can support a productive conversation for both health care providers and older adults.

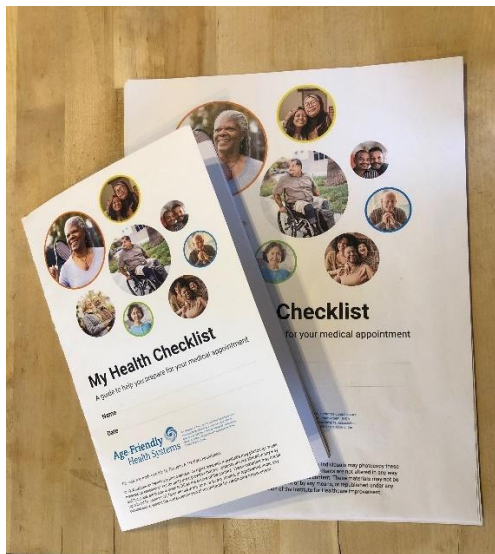
How can I print the checklist?

My Health Checklist is free for you to download, print, and share with your friends, family, community, faith group, clients, residents, or patients. Please do not make any changes to the checklist.

- Print on your own printer
 - For the checklist to be folded in half as a compact booklet: Print the PDF and then fold the pages in half

- For each page to take up an entire 8.5 x 11” sheet of paper: On the print screen, click on “Fit” (Windows) or “Scale to Fit” (Mac) and the printed checklist will expand to fill the 8.5 x 11” page
- Print using your organization’s in-house print shop or a local printer (e.g., FedEx, Staples). We recommend the following specifications to print as a compact booklet:
 - 5.5 x 8.5” saddle stitched
 - Full duplex
 - 100 lb card stock covers
 - 24 lb paper inside
- [Order professionally printed copies](#) via this online store
 - Note: If your organization is tax exempt, you can visit the Help Center of the online store for instructions to deduct the tax. The shipping address matches the address of the tax exemption form.

In the photo below, the booklet is shown at left (users have said this compact format, printed on 8.5 x 11” paper that is then folded in half, may feel more approachable); the entire 8.5 X 11” sheets is shown at right/underneath:



Why is the checklist this size and length?

The checklist is structured around the evidence-based elements of [age-friendly care](#), known as the 4Ms: What Matters, Medication, Mentation, and Mobility. Reviewers wanted specific examples included so that all older adults could see themselves in the checklist (see more under “How and why was the checklist developed?”)

The last page serves as the checklist for the **top three questions** the older adult wants to bring to the health care conversation, recognizing the time constraints of appointments.

The pages have high color contrast, large font size, and plenty of white space to support readability.

Users have said that formatting the checklist as a compact booklet, printed on 8.5x11" paper that is then folded in half, may feel more approachable.

Where can I find more resources?

For tips for asking and acting on What Matters to older adults:

- Download "[How to Have Conversations with Older Adults About "What Matters": A Guide for Getting Started](#)"

To support patients' conversations with the important people about wishes for care through the end of life:

- Download free guides for getting started from [The Conversation Project](#)

To support patients to think more about what matters most to them in their life and health:

- Visit [My Health Priorities](#)

For more resources for caregivers (care partners) or other people who support an older adult:

- Visit [Caring for Caregivers](#)

For more guidance on delirium, part of Mentation:

- Visit the [American Delirium Society](#)

To support patients to identify which questions to bring to medical appointments:

- Download [Ask Me 3®: Good Questions for Your Good Health](#)

How and why was the checklist developed?

We know^{1,2}:

- What brings staff the greatest satisfaction in their jobs is being able to deliver ideal patient experiences.
- Older adults want collaboration, kindness, and respect from their care team. And, to be active participants in their care.

My Health Checklist is meant to start this communication by fostering two-way conversations. It's a tool for older adults, caregivers, and health care professionals.

IHI received requests for this resource from health systems that wanted something to provide to older adults to help them feel ready for appointments — and requests from individual older adults who want something geared toward them.

The checklist gives open-ended prompts for each of the evidence-based elements of [age-friendly care](#), known as the 4Ms: What Matters, Medication, Mentation, and Mobility. The questions help older adults think about their situation now, what's going well, what could be better, and what they want their provider to know.

The examples for each prompt ("Some Ideas") are carefully crafted from feedback from older adults, caregivers, and health care team members, sharing a range of life experiences (such as retired or working, various income levels and housing needs, and different physical abilities). The last page serves as the checklist for the top three questions the older adult wants to bring to the health care conversation, recognizing the time constraints of appointments.

The goal is for anyone to be able to pick it up and think, "This could be for me":

- Examples include issues that people might hesitate to bring up on their own, including loneliness, treatments costing too much, bladder control, and relationships and intimacy
- Wording does not make assumptions about gender, family relationships, or sexual orientation
- Imagery and language reflect a variety of life experiences

Older adults, caregivers, and experts in age-friendly care provided input at the beginning, across several iterations, and through focus groups aiming to reach a mix of demographics. The ideas shared helped make the checklist better and more useful.

Acknowledgments

Thank you to the older adults, family and caregivers, health care team members, and age-friendly experts who have engaged in this work.

Thank you to AARP for supporting this work to support the use of My Health Checklist.

The development of My Health Checklist was made possible by The John A. Hartford Foundation, a private, nonpartisan, national philanthropy dedicated to improving the care of older adults. For more information, visit www.johnhartford.org.

The advice and stories in this resource have been gathered from the work of IHI and Age-Friendly Health Systems in partnership with the following organizations leading the way to learn from the use of My Health Checklist: Atlantic Health Systems, Bayhealth: Sussex Campus and Kent Campus, Case Western University, Erie County Medical Center, HealthPartners: Hudson Hospital and Clinic, JPS Health Network, The Peter Lamy Center on Drug Therapy and Aging at University of Maryland School of Pharmacy, Medstar Health, Parkview Health, Sarasota Memorial Health Care System, Sutter Health, Mann Grandstaff Veterans Affairs Medical Center (VAMC), West Tennessee Healthcare: Bolivar Hospital, Yale New Haven Health: Bridgeport Hospital and Milford Campuses.

Learn more about My Health Checklist and Age-Friendly Health Systems at ihi.org/AgeFriendly.

Institute for Healthcare Improvement

For more than 30 years, the Institute for Healthcare Improvement (IHI) has used improvement science to advance and sustain better outcomes in health and health systems across the world. We bring awareness of safety and quality to millions, accelerate learning and the systematic improvement of care, develop solutions to previously intractable challenges, and mobilize health systems, communities, regions, and nations to reduce harm and deaths. We work in collaboration with the growing IHI community to spark bold, inventive ways to improve the health of individuals and populations. We generate optimism, harvest fresh ideas, and support anyone, anywhere who wants to profoundly change health and health care for the better. Learn more at ihi.org.

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