

Age-Friendly Health Systems:

How to Introduce My Health Checklist to Older Adults

October 2025

ihi.org/AgeFriendly

"How to Introduce My Health Checklist to Older Adults" supported by AARP.

My Health Checklist was created especially for:

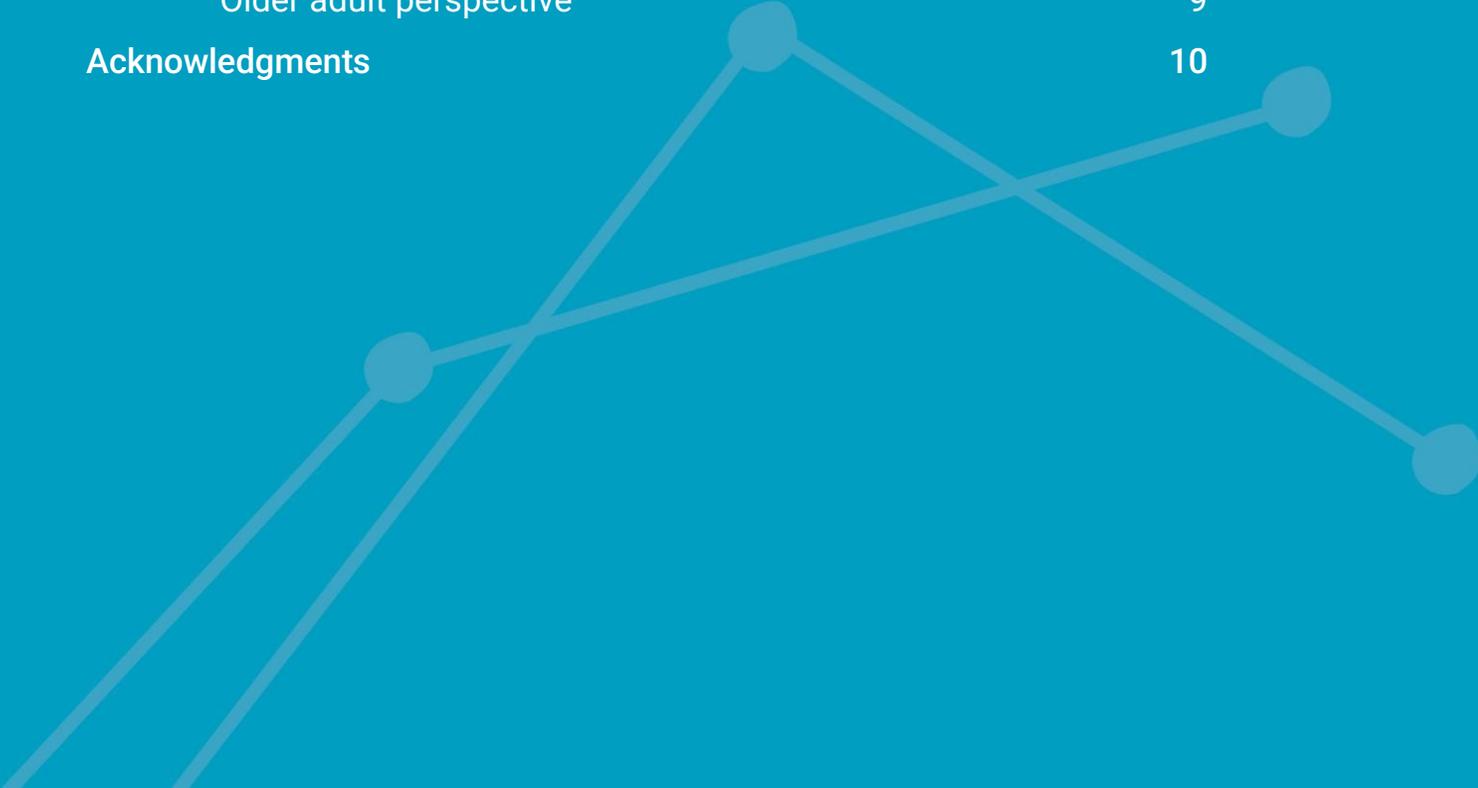
Age-Friendly 
Health Systems

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. 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.

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

For more information on common questions and why this is important, visit [ihl.org/AgeFriendly](https://www.ihl.org/AgeFriendly) and see the resource “**FAQs and Why This Matters.**” Also see the resource “**How to Introduce My Health Checklist to Staff.**”

Steps to introduce the checklist

Before the appointment or conversation

Consider where to share within your organization

How can you share the checklist directly with older adults? Where might you share the checklist with a caregiver or support person, or somewhere that anyone can access like a waiting room? What language(s) will they want to read? (The checklist is available in English, Chinese, Portuguese, and Spanish.)

For example:

As part of the patient experience:

- Share with geriatric resource packets distributed in the hospital and send with existing packet for home visits (Bridgeport)
- Hand out with urgent care visit discharge paperwork (Mann Grandstaff VAMC)
- Target transitional care as part of swing bed work as a place to share (Hudson)
- Social worker sharing with complex neurology patients in independent rehab facility (Sarasota)
- Share with patients and families when seeing them on the inpatient Geriatric consult team and outpatient primary care (Erie Medical)
- Share during home health (Sutter)

Through proactive outreach:

- Share with older adult volunteers (Hudson)
- Present to Patient Experience Council (Hudson)
- Use during disease and illness-specific days or activities, such as a stroke awareness event at hospital (Hudson)

Consider where to share in your community

Partner with the community. Who in your community already meets with or supports older adults?

Look for locally-based organizations where older adults gather, or organizations that work with older adults, to meet them where they are.

For example:

- Senior centers (Sarasota)
- Community health fairs (Sarasota)
- YMCA and Silver Sneakers group (Hudson)
- Partner with the AARP state office
- Distribute through Meals on Wheels or similar services
- Resident-run advisory committees in independent living facilities (Hudson)
- Bring to assisted living and long-term care facilities (Hudson)
- Reach out to a community church and provided the checklists. Plan to return to get feedback. (Bridgeport)
- Connect with an individual from the local Retired Senior Volunteer Program or Area Agency on Aging (Parkview)
- Connect with faith leaders
- Leave copies at the library
- Offer at gatherings of family caregivers

Format

Print: Will you print the checklist so that it can be folded in half as a compact booklet, or print it so that each page uses an entire 8.5 x 11" sheet of paper? Can you print a hard copy on the unit floor computer? Can you print multiple copies to hand out at your organization or place an order elsewhere?

Tips for printing:

- Print on your own printer

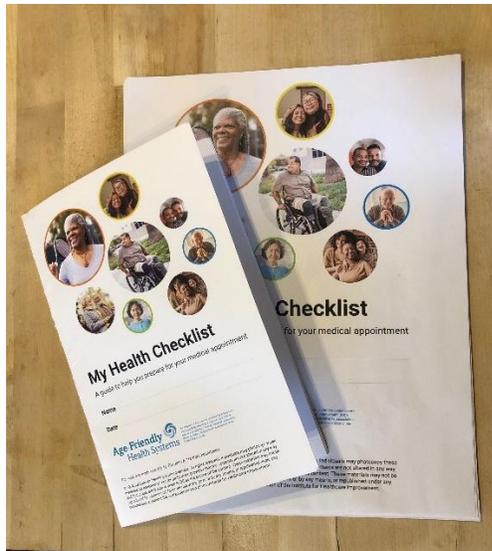
- For the checklist to be folded in half as a compact booklet: Print the PDF and then fold the pages in half
- For each page to take up an entire 8.5 x 11" sheet of paper: On the print screen, click on "Fit" (Windows) or "Scale to Fit" (Mac) and the printed checklist will expand to fill the 8.5 x 11" 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

Digital: If you will share the checklist online, who do you need to partner with (e.g., IT department)? Consider what language(s) will be used. Consider internet access as well as comfort with technology

For example:

- Send in the electronic patient portal before an appointment.
 - One team noted that many older adults in their community are early adopters of portal use (and challenges tend to be related to internet access, not age). They will make checklist an optional resource in the system, with the older adult's top 3 questions from the final page of the checklist viewable by the provider. (Sutter)
 - One older adult shared that they prefer printing items from their electronic patient portal to bring to doctor appointments (Bridgeport)
 - A caregiver and several older adults noted that while many older adults use technology comfortably, many prefer or require printed copies of materials. It is important to offer that as an option.
- Order the checklist printed as a small booklet from the local print shop or print in-house, or from [this online print shop](#).
- Create a video to play in the waiting room about the checklist and leave copies out on the tables

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:



Introducing the checklist

Choose a time

The older adult does not need to complete the checklist in the moment.

For example:

- When someone is rooming the older adult
- During the appointment
- During geriatric rounds
- As part of print and/or electronic discharge materials (for example, transitioning from hospital to home, or from home health to primary care)
- As part of a visit with social worker or other care team member supporting advance care planning

Share the checklist

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 can help me and other members of your health care team to provide you the best care.”
- I have shared with patients being discharged from the hospital that have a follow up visit scheduled with their PCP. I explain how the checklist is an optional guide to help them navigate important topics they would like to discuss with their providers. (Bridgeport)
- “This is a great guide to help organize your care and make sure the healthcare team is meeting your needs.” (Atlantic Health)
- “This is a tool to assist in doctors’ visits and help you to recall information that’s important to you.” (Bayhealth)
- “This guide can help you get your thoughts on paper for when you visit with your doctor.” (Sarasota)
- 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.

Keep the conversation going

Encourage the older adult to complete the checklist later, and then to bring it with them to a future health care conversation.

“I do geriatric consults in the hospital and the 4Ms are already incorporated into my typical visit. I typically share as something to help them think to be better prepared for appointments...I have shared with patients being discharged from the hospital that have a follow-up visit scheduled with their PCP. I explain how the checklist is an optional guide to help them navigate important topics they would like to discuss with their providers.”

–Melissa Hanson, APRN, Geriatrics/GEMS, Bridgeport Hospital

Stories in Action

Older adult perspective

“The brochure was beneficial in helping me formulate my questions in advance of my appointment. In addition, right after [the conversation about My Health Checklist] I called and requested that I have an X-ray on my foot in advance of seeing my doctor. The X-ray revealed that the surgery on my right foot... had not healed correctly, indicating shifting of the screw implants. This is only now being discovered, nine months after surgery, and a corrective surgery is required... I am wearing a boot until then.

“The guide gave me the initiative to request the X-ray because I felt something was not right. In addition, I will insist on routine monitoring...

“During my previous visits, my foot was examined but not X-rayed, instead it was suggested I buy expensive shoe inserts to help with swelling and numbness. However, had X-ray monitoring occurred early on, corrective measures outside of repeat surgery might have been an option, and by the way, the inserts, a wasted expense.”

Caregiver perspective

The daughter of an older adult writes:

“I finally had some time to look through the checklist, and my overall opinion is that it’s a fantastic tool for older adults and their caregivers/helpers!

“I think the four categories are excellent (“the 4Ms”), and encompass all pertinent areas of importance in terms of what most older people want/need to speak to their physicians about during an appointment. So often the conversation gets off track from the get-go and is like chasing the wind, and critical concerns often get missed. This booklet would go a long way towards helping seniors organize their thoughts before seeing a provider. I think it would greatly help guide the provider as well.”

She also notes,

“Many seniors do have the knowledge to [go online to get the material], but so many do not nor do they have a younger more tech-savvy helper. I realize computers and technology continue to be the way we get things done, but there are still older adults who are perhaps tech challenged or visually impaired who need things available to them in an alternate format without having to jump through more computer hoops.”

Health system perspective

At Sutter Health, Kerri Maya, PhD(c), MSL, RN, NPD-BC, Director, Continuing Professional Development, Sutter Health System Office, leads continuing professional development across the system. This work includes evaluating provider materials and internal content designed to improve provider skills and outcomes of patients. She says, “When it comes to provider communication skills and agenda setting, it really bothers me when the provider assumes they need to drive the agenda, rather than the patient. This is often based on assumption that the

older adult is not prepared for these conversations, so providers have to take charge. Culturally, in health care, we often still hold back on sharing full information with patients.

“The My Health Checklist is the perfect tool for this. It has the potential to prepare the patient and family for these health conversations! We value a prepared patient as a system – and this guide is the ideal tool to help prepare older adults.”

Community partnership perspective

At Hudson Hospital and Clinic, Joy Hughes, RN Care Management Coordinator, and Megan Hundertmark, PharmD, Inpatient Pharmacist, are introducing My Health Checklist over a series of meetings. At an assisted living facility and long-term care facility, the session was listed on the activity board amongst bingos and other activities. “We had a very positive response,” says Hughes.

The Hudson team sat in the dining room, and centers brought residents in who they thought would be interested, as well as their spouses in some cases. People of all cognitive abilities joined the activity. Residents took time to fill out the checklist on the spot.

Older adult perspective

At Bridgeport, Melissa Hanson received feedback from a few older adults. They thought the length of the checklist was appropriate and easy to navigate. One older adult who brought the guide with her to an appointment said the checklist was “very specific with questions I would not have considered previously” and felt she was “better prepared with my thoughts written.”

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

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