Quality Care Senior

The Follow-Up Appointment Coverage Scorecard

A companion worksheet to Closing the Loop — treat follow-up transportation as a measurable coverage process, not a one-time ride request.

> Use this scorecard for every appointment that requires transportation support. Mark each item complete, incomplete, or not applicable. The scorecard is a process-control tool: it exists to find incomplete handoffs before they become repeated staff work.

Coverage step	Complete	Incomplete	N/A
Appointment date, time, provider, and location confirmed	☐	☐	☐
Transportation request submitted with sufficient lead time	☐	☐	☐
Ride matched to mobility and supervision needs	☐	☐	☐
Pickup location and return plan verified	☐	☐	☐
Escort requirement reviewed against the care plan or facility policy	☐	☐	☐
Resident or responsible contact informed	☐	☐	☐
Appointment attendance recorded	☐	☐	☐
Follow-up instructions routed to the appropriate care team	☐	☐	☐
Next appointment or action assigned	☐	☐	☐
Unresolved barrier escalated to a named owner	☐	☐	☐

Appointment

_____

_____

Provider · date · time · location

Resident

_____

_____

Name · mobility needs · supervision needs

Owner

_____

_____

Role accountable for closing the loop

Review incomplete items

Review incomplete items during daily or weekly operations meetings. Look for repeated failure points by appointment type, destination, resident need, or role. Do not measure only whether a ride was requested — close the task only after the facility knows whether the appointment occurred, whether the next visit was scheduled, and whether the care team received relevant information through the approved channel.

Language that keeps coordination respectful: identify what support is needed rather than labeling the resident. Ask which part of the transportation plan is incomplete, confirm the pickup, escort, and return plan, and note what changed since the last successful visit. This language supports accountability without assigning blame. It is operational guidance, not clinical advice.

Contact Quality Care Senior today
678-996-6929 ·
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The signs do not prove Alzheimer's. The kit is educational and does not diagnose.