HEART FAILURE HOSPITALIZATION PATHWAY TOOLKIT: KEY TABLES AND FIGURES FOR POINT-OF-CARE

This toolkit serves as a companion to the ***2019 ACC Expert Consensus Decision Pathway on Risk Assessment, Management, and Clinical Trajectory of Patients Hospitalized with Heart Failure*** *and its* ***2024 Focused Update.***

The goal of the pathway is to help clinicians consider the short-term and long-term outlook for their patients hospitalized with heart failure (HF)—to institute therapies to reduce symptoms and optimize outcomes, to ensure that those plans are conveyed clearly to caregivers after discharge, and to engage patients to share in decisions and become active participants in their care.

The toolkit provides the tables and figures from the documents, adapted to help clinicians implement key principles from the pathway at the point of care by posting them for reference, filling in provided forms and checklists to help standardize processes, or using these figures as templates for your institution's EHR programming teams.

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Heart Failure Hospitalization Pathway Toolkit: Key Tables and Figures for Point-of-Care

Table of Contents Page

OVERVIEW

Major Nodes and Tools

Roadmap for Risk Assessment, Management, and Clinical Trajectory of Patients Hospitalized with Heart Failure

Node	TRIAGE IN ED	ADMISSION	DAILY TRAJECTORY CHECK	TRANSITION TO ORAL THERAPIES	DISCHARGE DAY	POST DISCHARGE FOLLOW-UP
Tools	• Risk Stratification of Acute HF in the ED (Figure 2) • Predictors of Risk in Emergency (Table 1) • Factors Contributing to HF Decompensation (Table 2)	• Clinical Evidence of Congestion (Table 3) • Hemodynamic Profiles (Figure 3) • Comorbidities to Consider (Table 4) • Risk Assessment During Hospitalization (Table 5) • Interventions for Patients at High Risk (Table 6)	• Trajectory Assessment and Next Steps (Figure 4) • Evaluation of Initial and Residual Congestion (Figure 5) • Diuretic Therapy by Trajectory (Figure 6) • Clinical Trajectories (Figure 7a) • Diuretic Dosing (Table 7)	• Risk Assessment During Hospitalization (Table 5) • Titration of GDMT for HFrEF (Figure 7b)	• Education for Patients and Caregivers (Figure 10) • Focused Discharge Handoff (Figure 11) • Checklist for Communication to Continuing Care Providers (Figure 12)	• Checklist for Follow-up Phone Call within 48-72 Hours (Figure 13) • First post-Discharge Visit Checklist (Figure 14)

PALLIATIVE CARE

- Aspects of Palliative Care (Figure 15)
- Goals of Care/Advanced Care Planning (Table 9)

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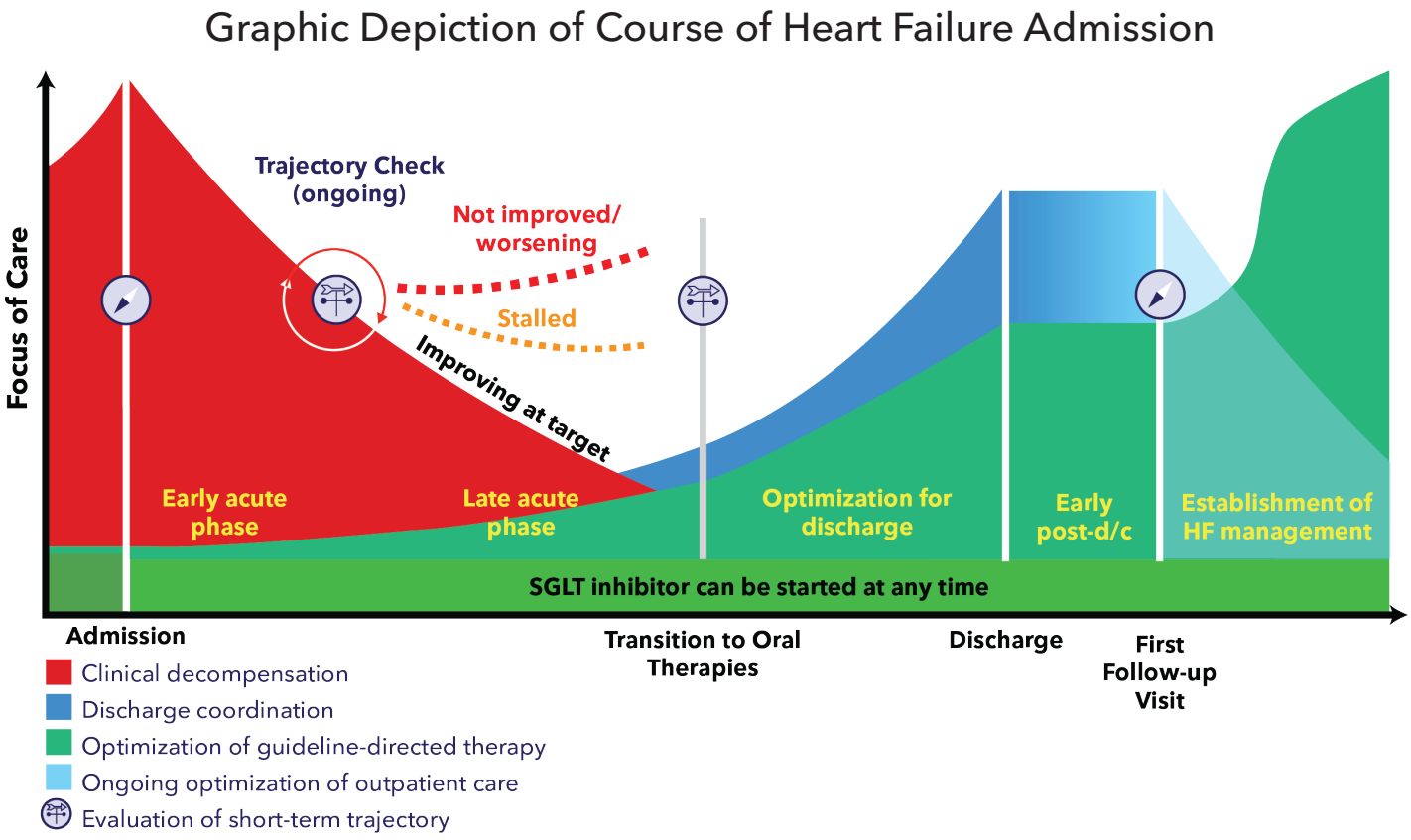
OVERVIEW

Pathway Summary Graphic

Figure 1

This shows the degree of focus on clinical decompensation (***red***), discharge coordination (***blue***), ongoing coordination of outpatient care (***light blue***), and optimization of guideline-directed medical therapy (***green***), with ongoing assessment of the clinical course (***circle with arrows***), and key time points for review and revision of the long-term disease trajectory for the HF journey (***compass signs***).

→→ For optimization of guideline directed medical therapy, refer to the *2024 ECDP for Optimization of Heart Failure Treatment and the 2022 ACCF/AHA/HFSA Heart Failure Guidelines.*

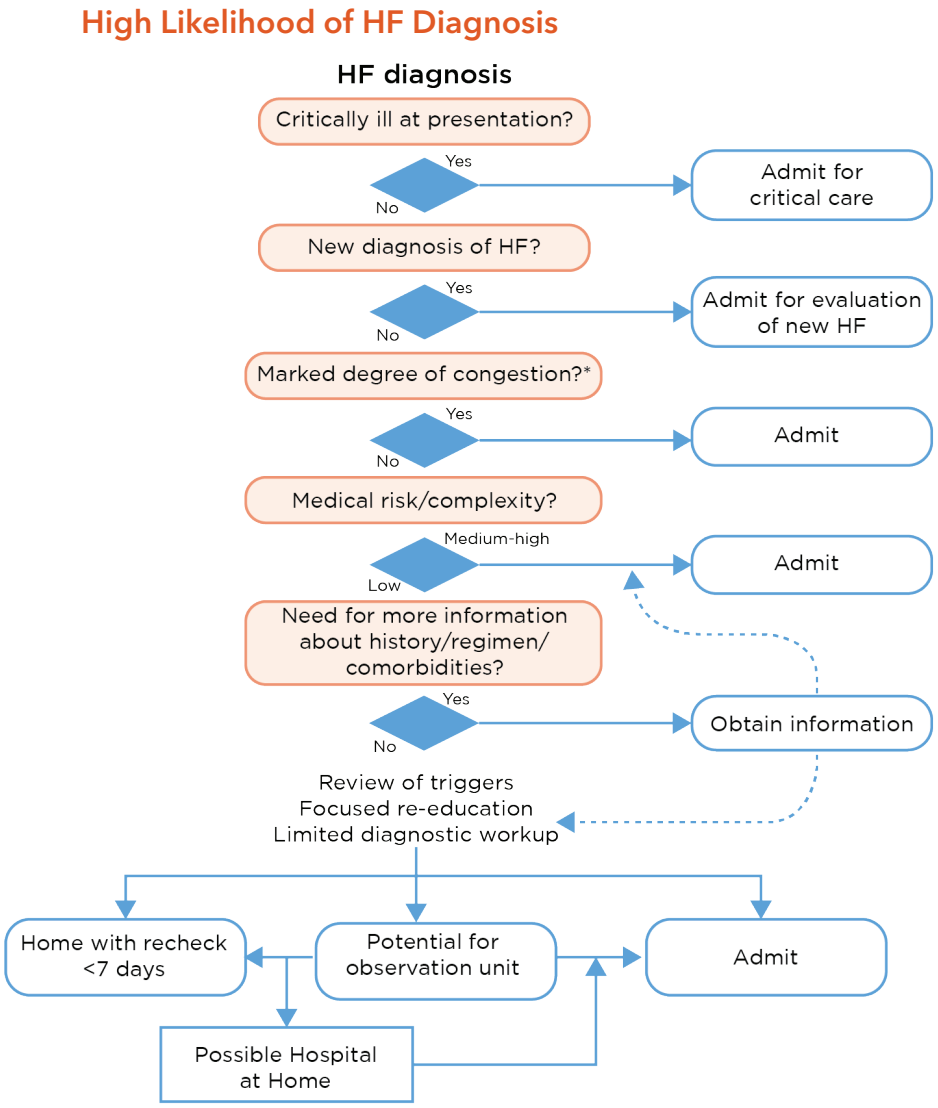


TRIAGE IN ED

Risk Stratification of Acute Heart Failure in the Emergency Department

Figure 2

Use this triage algorithm about admission and initial therapy to guide thought processes during admission evaluations rather than as a formal description of admission criteria and administrative processes surrounding admission.



* Marked leg edema, ascites, or scrotal or perineal edema may be clinical signs of marked congestion. The degree of radiographic and biochemical abnormalities may also indicate the degree of congestion.

Abbreviations: ED = emergency department; HF = heart failure

TRIAGE IN ED

Predictors of Risk in Emergency Care Studies Evaluating Patients With Acute Heart Failure

Table 1

Use this table to evaluate a patient's risk and help determine additional next steps.

Immediate Risk (measures of acute severity)	☐ Hypoxia ☐ Shock/hypoperfusion ☐ Respiratory distress ☐ Anuria ☐ Acute and worsening condition (sepsis, stroke, acute coronary syndrome, hemodynamically significant arrhythmia)
Intermediate Risk (predictors of events through 30 days)	☐ New onset heart failure ☐ Low BP without shock or hypoperfusion ☐ Tachycardia ☐ Kidney dysfunction ☐ Hyponatremia ☐ Elevated cardiac troponin without ACS ☐ Degree of BNP elevation ☐ Liver dysfunction
Lower Risk	☐ Normal BP and HR ☐ Brisk response to initial intravenous diuretic with diuresis and symptom relief ☐ Rapid resolution of symptoms in the ED ☐ Normal kidney and liver function without recent decline ☐ Normal BNP and cardiac troponin

ACS = acute coronary syndrome; BP = blood pressure; BNP = B-type natriuretic peptide; HR = heart rate; ED = emergency department

TRIAGE IN ED

Common Factors That Can Contribute to Worsening Heart Failure

Table 2

Use this table to support the evaluation of patients for factors, both cardiac and non-cardiac, that may contribute to worsening heart failure.

Common Factors That Can Contribute to Worsening Heart Failure
☐ Acute myocardial ischemia
☐ Uncontrolled hypertension
☐ Atrial fibrillation and other arrhythmias
☐ Medications with negative inotropic effect
☐ Medications that increase sodium retention (NSAIDs, thiazolidinediones, steroids)
☐ Non-adherence with medication regimen, sodium or fluid restriction
☐ Anemia
☐ Acute infections (upper respiratory infection, pneumonia, urinary tract infections)
☐ Additional acute cardiovascular diagnoses (aortic valve disease, endocarditis, myopericarditis)

ADMISSION

Clinical Evidence of Congestion

Table 3

Use this table to identify signs and symptoms of congestion, which may be tracked as targets during decongestion and may serve as sentinel symptoms for recurrent congestion after discharge.

Clinical Evidence of Congestion	
Symptoms	**Signs†**
• Orthopnea	• Elevated jugular venous pressure
• Dyspnea on minimal exertion	• Rales‡
• Paroxysmal nocturnal dyspnea	• Pleural effusion‡
• Nocturnal cough*	• Increased intensity of pulmonary component of second sound
• Bendopnea	• Third heart sound
• Abdominal swelling	• Murmurs of mitral and/or tricuspid regurgitation
• Early satiety	• Pulsatile hepatomegaly
• Anorexia, nausea	• Ascites§
• Right upper quadrant pain	• Pre-sacral, scrotal, or perineal edema
• Peripheral swelling	• Peripheral edema
• Rapid weight gain	

* Often when supine; † JVP is the most sensitive sign. Rales may not always be present; ‡ Not common in chronic HF;§ May be difficult to distinguish from central adiposity

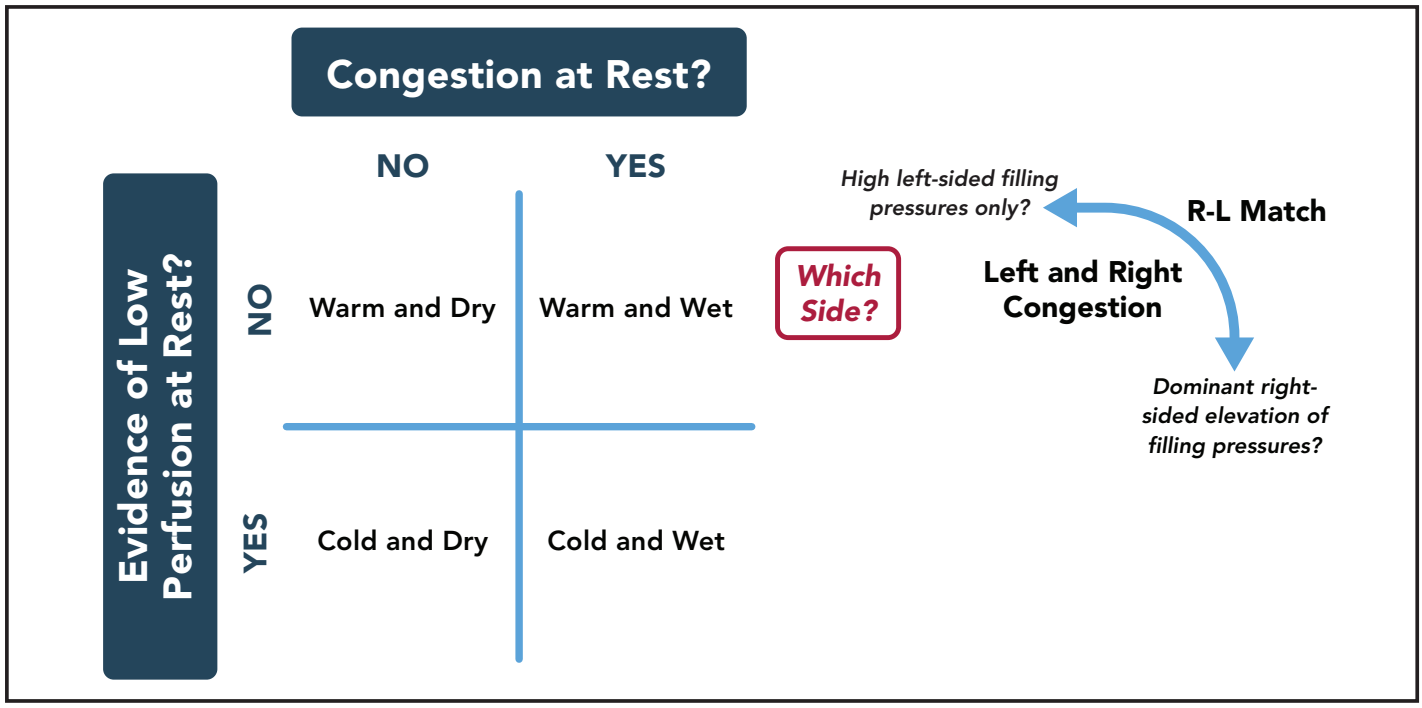
ADMISSION

Classification of Patients Presenting With Acutely Decompensated Heart Failure

Figure 3

Use this figure to identify signs and symptoms of congestion, which may be tracked as targets during decongestion and may serve as sentinel symptoms for recurrent congestion after discharge.

Hemodynamic Profiles



ADMISSION

Key Comorbid Conditions to Consider

Table 4

Evaluation of patient comorbidities is a key component of patient assessment. Consider this list of comorbidities and their therapies in relation to their role in HF decompensation and as independent targets for intervention.

Key Comorbid Conditions to Consider	
Cardiovascular	☐ Coronary artery disease/acute coronary syndrome
	☐ Atrial fibrillation/flutter
	☐ Cerebrovascular disease, TIA/stroke
	☐ Peripheral vascular disease
	☐ Structural valvular heart disease
Systemic Disease	☐ Hypertension
	☐ Diabetes mellitus
	☐ Chronic kidney disease
	☐ Chronic lung disease
	☐ Liver disease
	☐ Infection
	☐ Sleep apnea
	☐ Anemia/iron deficiency
	☐ Rheumatologic diseases
	☐ Amyloidosis
	☐ Cancer
	☐ Thyroid disease
General Conditions	☐ Obesity
	☐ Malnutrition
	☐ Frailty, deconditioning
Psychosocial	☐ Dementia/cognitive decline
	☐ Depression
	☐ Substance abuse
	☐ Tobacco abuse
	☐ Alcohol abuse
	☐ Inadequate social support
	☐ Nonadherence

ADMISSION

Assessing Risk During Hospitalization

Table 5

Use this table to identify risk factors that are most likely to be modifiable. These should help to set patient goals, guide inhospital management, and re-assess integrated risk at discharge. *(Table will continue on the next page)*

Modification of bolded/italicized items decreases risk. Note that the references for risk factors are provided as examples and are not meant to list all sources of validation.

Chronic History Prior to Admission	
☐ **Older Age (robust in all models)** ☐ **Number of Previous HF hospitalizations** ☐ **Comorbidities, especially diabetes, COPD, liver disease, cancer, dementia** ☐ **Frailty** ☐ **Known low LVEF in HFrEF** ☐ **RV dysfunction**	
Assessment at Admission	**Re-Assessment at Discharge**
Class IV symptoms	Effective decongestion improves prognosis.
Non-adherence to medications or salt/fluid restriction	Focused education during hospitalization with increased home and community support may improve adherence.
Progressively higher risk with higher admission natriuretic peptide (NP) levels	Larger % reduction (>30-60%) in NP levels associated with better outcomes. Progressively higher risk with higher discharge NP levels.
Renal dysfunction markers: • Elevated serum creatinine or low clearance • Additional risk of high BUN • Low spot urine sodium after first IV diuretic dose • Diuretic resistance with high outpatient doses	 Risk increased, but small increases in creatinine accompanying successful decongestion are associated with better prognosis. High BUN at discharge increases risk. Low total urinary sodium excretion may be a more important marker than total urine output during hospitalization. Diuretic resistance in-hospital associated with longer LOS and worse outcomes. High risk if discharged on high loop diuretic doses.
Degree of congestion at admission not predictive of outcome except longer length of stay with greater excess volume	Residual congestion after treatment confers high risk. • High measured filling pressures • Orthopnea • Edema • Composite congestion scores • Lack of hemoconcentration

ADMISSION

Assessing Risk During Hospitalization

Table 5 *(Continued)*

Assessment at Admission	Re-Assessment at Discharge
Hemodynamic profile of "Cold and Wet" at admission	Discharge with either cold or wet profile associated with higher risk.
Low systolic blood pressure	Low systolic blood pressure at discharge also identifies high risk.
Troponin elevation	Risk if elevated at any time during hospitalization.
Hyponatremia	Lower sodium at discharge predicts higher risk.
Increased risk at admission if: ***· No RAS therapy*** ***· No beta blocker therapy***	Discontinuation of ACEI/ARB in hospital for hypotension or kidney dysfunction is associated with poor outcomes. Unknown impact of re-initiation after discontinuation for circulatory and/or renal reasons. Discharge without RAS inhibition or discharge without beta-blocker associated with high risk.
Unexpected In-hospital Events Conferring Additional Risks	
• Resuscitation or Intubation • Intravenous inotropic therapy even if brief	
Integrated Risk at Transition to Discharge = { **• Admission Risk** **• In-hospital Trajectory** **• Unexpected Events**	

ACEI = angiotensin-converting enzyme inhibitor; ARB = angiotensin receptor blocker; BUN = blood urea nitrogen; COPD = chronic obstructive pulmonary disease; eGFR = estimated glomerular filtration rate; HF = heart failure; IV = intravenous; LOS = length of stay; LV = left ventricular; NP = natriuretic peptide; RAS = renin-angiotensin system; RV = right ventricular.

ADMISSION

Interventions for Patients at High Risk of Unfavorable Outcomes

Table 6

Once you have assessed a patient's comorbidities and other risk factors, and determined them to be at high risk for unfavorable outcomes, use this table to guide additional steps.

Interventions for Patients at High Risk of Unfavorable Outcomes
• **Discussion of prognosis**
• **Evaluation for advanced *therapies** if appropriate**
• **Review/revision of goals of care and advanced directives**
• **Consideration before interventions† that may be difficult to discontinue**
• **Education regarding palliative care and hospice options**

* Transplantation, mechanical circulatory support

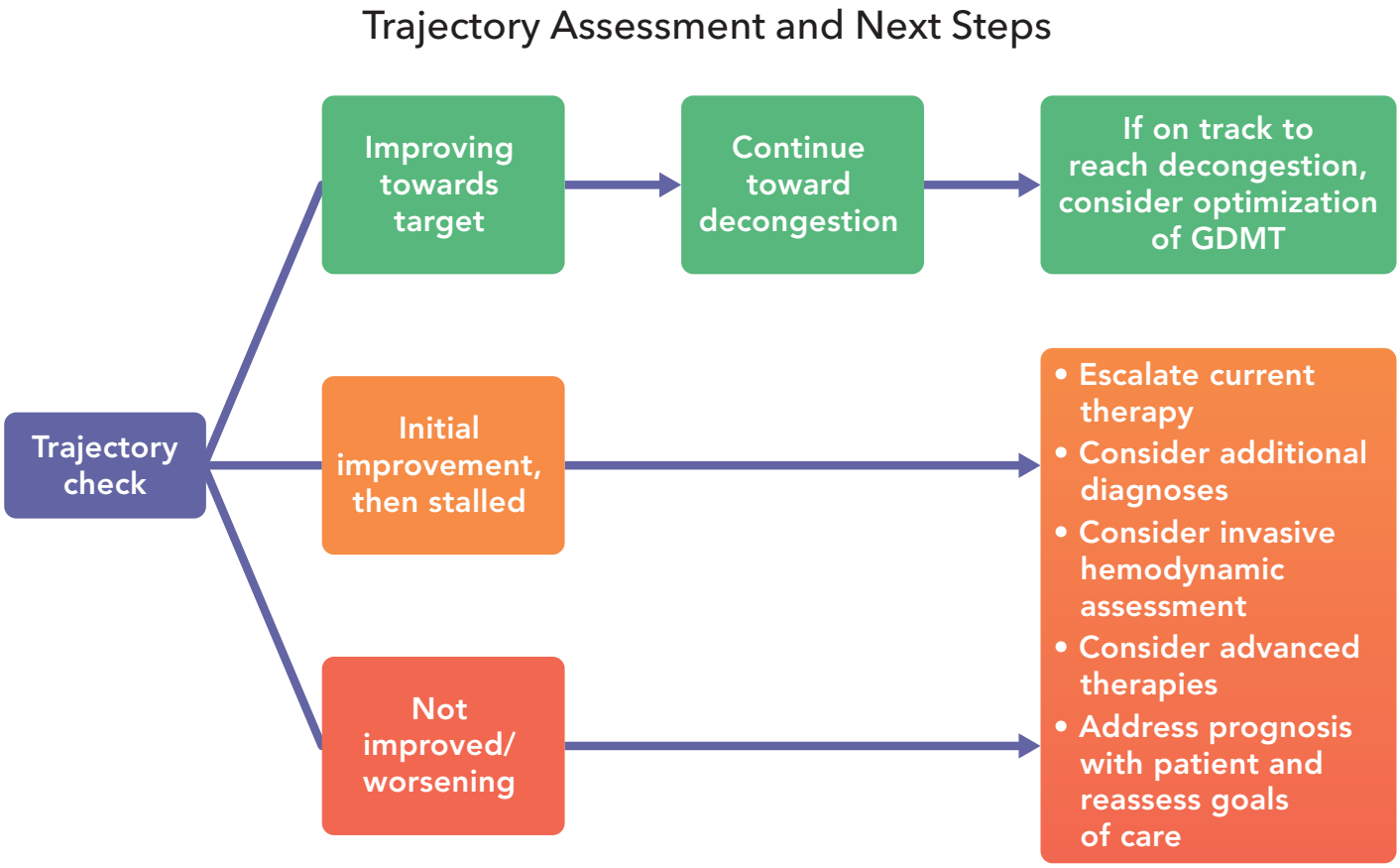
† Intravenous inotropic therapy, temporary circulatory support, mechanical ventilation, dialysis

DAILY TRAJECTORY CHECK

Clinical Trajectories and Their Implications for Therapy

Figure 4

Use figures 4 (*this page*) and 7a (*next page*) to assess a patient's daily clinical trajectory. These trajectories translate into different management strategies throughout the hospitalization and post-discharge.



GDMT= guideline-directed medical therapy

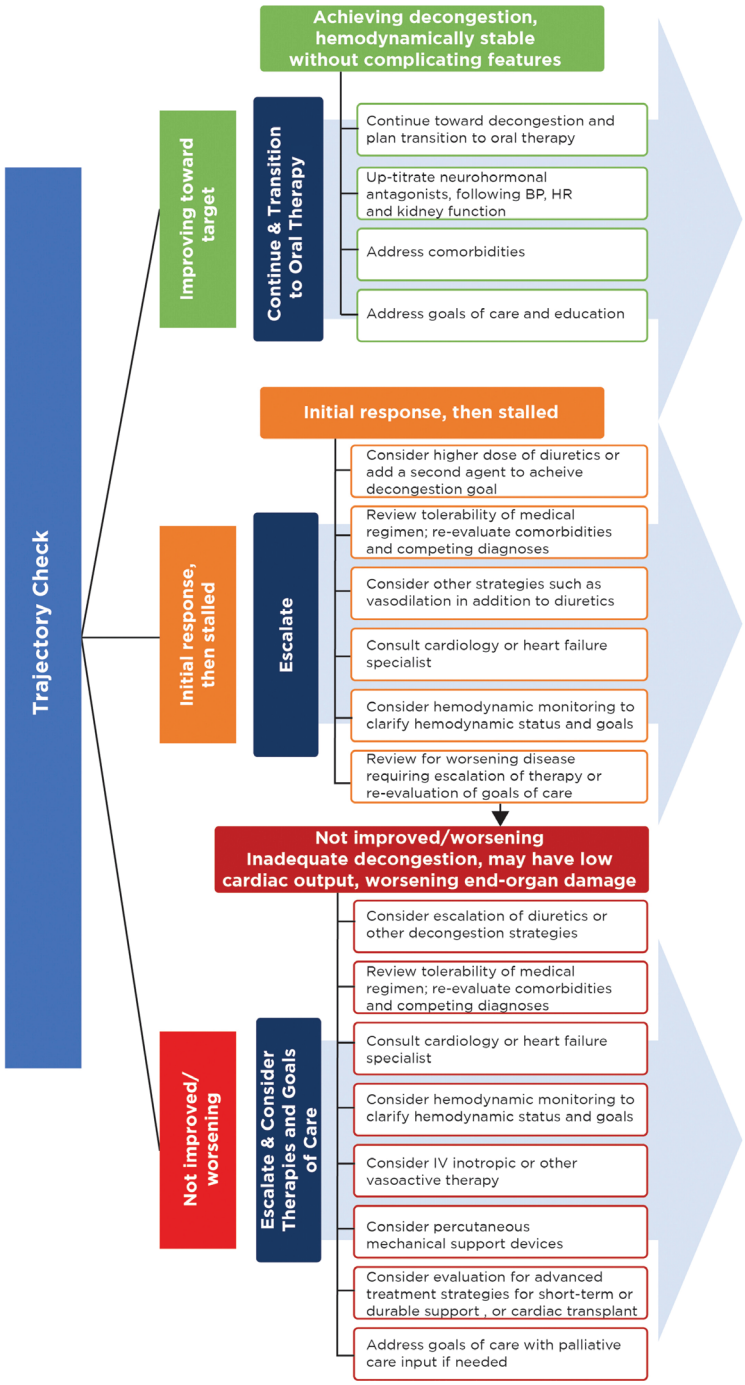
DAILY TRAJECTORY CHECK

Clinical Trajectories

Figure 7a

Identification of patient's clinical trajectory translates into different management strategies throughout hospitalization and post-discharge.

→ To optimize GDMT, refer to the *2024 ECDP for Optimization of Heart Failure Treatment.*



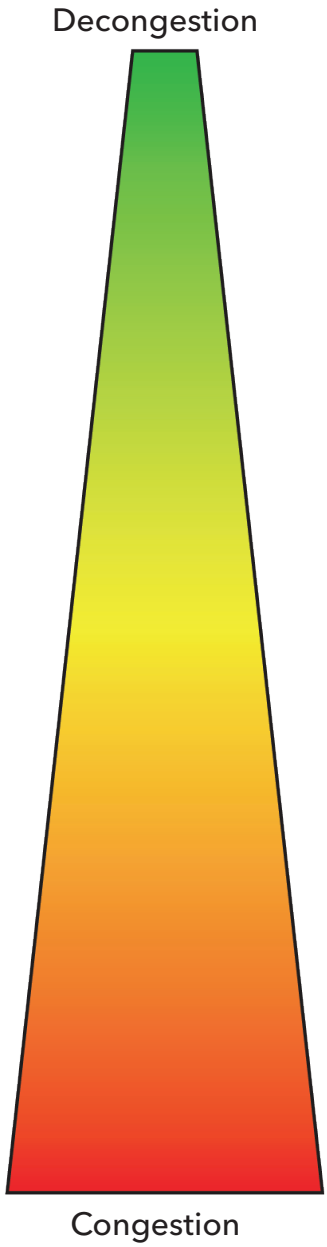
Click to download this figure.

DAILY TRAJECTORY CHECK

Evaluation of the Degree of Clinical Congestion, With Common Reasons for Residual Congestion Listed in the Text Box

Figure 5

Inpatient trajectories are primarily defined by the pace and extent of decongestion. Use the figure below for evaluation of the success of de-congestion for a patient.



Freedom from clinical congestion

No peripheral edema

No rales

No dyspnea on minimal exertion

No hepatomegaly or congestive GI symptoms

No orthopnea or bendopnea

Jugular venous pressure ≤ 6-8 mm Hg

No hepatojugular reflex

Common Reasons for Residual Congestion

Low cardiac output state

Dominant right heart failure

Advanced kidney disease

Symptomatic hypotension

Limitations to patient engagement in self-care

Lack of improvement in signs/symptoms of HF

Lack of decrease in natriuretic peptide levels

Lack of decrease in weight

GI = Gastrointestinal; HF = heart failure

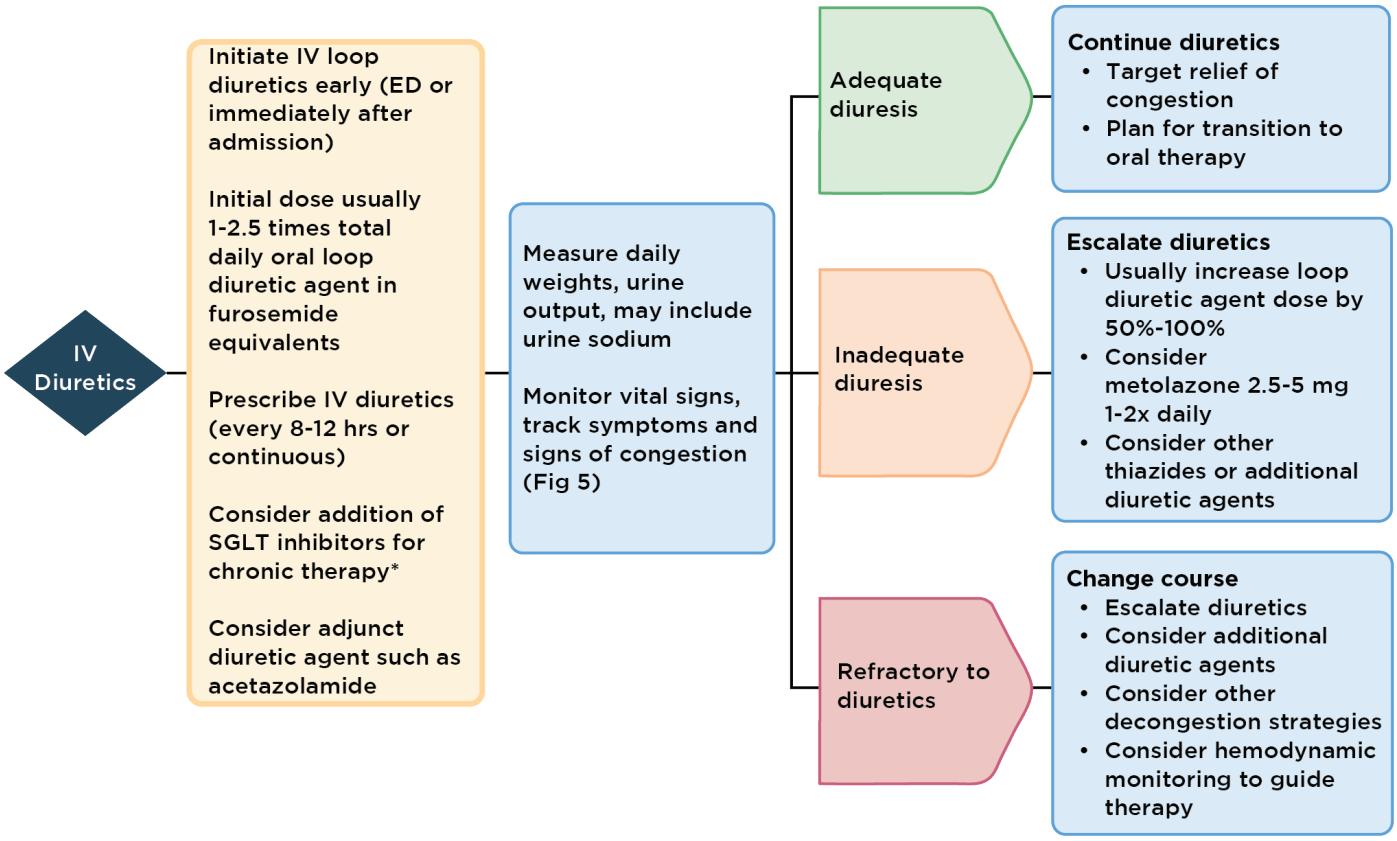
DAILY TRAJECTORY CHECK

Diuretic Therapy in Different Clinical Trajectories

Figure 6

Use this figure to guide therapy at different clinical trajectories.

Guidance on Diuretic Therapy



BP = blood pressure; ER = emergency room; IV = intravenous

DAILY TRAJECTORY CHECK

Diuretic Dosing

Table 7

Use the table to help establish an effective diuretic regimen.

Guidance on Diuretic Dosing

Class	Drug	Usual Outpatient Dosing (Maximum†)	Usual Inpatient Dosing* (Maximum†)
Loop diuretics	Bumetanide	0.5–2 mg orally once to twice daily (10 mg/day)	0.5–4 mg IV once to three times daily (5 mg/dose) *Or* 0.5–2 mg/hour IV infusion (4 mg/hour)
	Furosemide	20–80 mg orally once to twice daily (600 mg/day)	40–160 mg IV once to three times daily (200 mg/dose) *Or* 5–20 mg/hour IV infusion (40 mg/hour)
	Torsemide	10–40 mg orally once daily (200 mg/day)	N/A‡
Thiazide-type diuretics	Chlorothiazide	N/A	0.5–1 g IV once to twice daily (2 g/day)
	Hydrochlorothiazide	25–50 mg orally once daily (100 mg/day)	25–50 mg orally once to twice daily (100 mg/day)
	Chlorthalidone	25–50 mg orally once daily (100 mg/day)	12.5–25 mg orally once to twice daily (100 mg/day)
	Metolazone	2.5–5 mg orally once daily (20 mg/day)	2.5–5 mg orally once to twice daily (20 mg/day)

* For patients receiving loop diuretics prior to admission, the oral dose should be changed to an intravenous dose of 1–2.5 times the home dose. For patients naïve to therapy, the lower end of the dosing interval should be used.

† "Usual" dose ranges reflect approved product labeling and safety and efficacy results from large, randomized controlled trials. Higher ranges may be considered on the basis of observational data and clinical experience.

‡ Torsemide is not available as an intravenous formulation in the United States; oral therapy may be initiated prior to discharge to assess patient response.

IV = intravenous; N/A = not applicable

TRANSITION TO ORAL THERAPIES

Assessing Risk During Hospitalization

Table 5

Use this table after the patient has undergone clinical stabilization and is being transitioned to oral therapy for discharge. This assessment should help clarify goals and guide plans for longitudinal follow-up after discharge. The integrated riskfor discharge includes non-modifiable risk factors from admission, residual congestion or unexpected events during hospitalization, and lack of guideline-directed therapies for chronic heart failure. The transition node offers further opportunity for additional adjustment of these therapies to be continued after discharge. *(Table will continue on the next page.)*

Modification of bolded/italicized items decreases risk. Note that the references for risk factors are provided as examples and are not meant to list all sources of validation.

Chronic History Prior to Admission	
☐ **Older Age (robust in all models)** ☐ **Number of Previous HF hospitalizations** ☐ **Comorbidities, especially diabetes, COPD, liver disease, cancer, dementia** ☐ **Frailty** ☐ **Known low LVEF in HFrEF** ☐ **RV dysfunction**	
Assessment at Admission	**Re-Assessment at Discharge**
Class IV symptoms	Effective decongestion improves prognosis.
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Degree of congestion at admission not predictive of outcome except longer length of stay with greater excess volume	Residual congestion after treatment confers high risk. • High measured filling pressures • Orthopnea • Edema • Composite congestion scores • Lack of hemoconcentration

TRANSITION TO ORAL THERAPIES

Assessing Risk During Hospitalization

Table 5 *(Continued)*

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Hyponatremia	Lower sodium at discharge predicts higher risk.
Increased risk at admission if: ***· No RAS therapy*** ***· No beta blocker therapy***	Discontinuation of ACEI/ARB in hospital for hypotension or kidney dysfunction is associated with poor outcomes. Unknown impact of re-initiation after discontinuation for circulatory and/or renal reasons. Discharge without RAS inhibition or discharge without beta-blocker associated with high risk.
Unexpected In-hospital Events Conferring Additional Risks	
• Resuscitation or Intubation • Intravenous inotropic therapy even if brief	
Integrated Risk at Transition to Discharge = { • Admission Risk • In-hospital Trajectory • Unexpected Events	

ACEI = angiotensin-converting enzyme inhibitor; ARB = angiotensin receptor blocker; BUN = blood urea nitrogen; COPD = chronic obstructive pulmonary disease; eGFR = estimated glomerular filtration rate; HF = heart failure; IV = intravenous; LOS = length of stay; LV = left ventricular; NP = natriuretic peptide; RAS = renin-angiotensin system; RV = right ventricular.

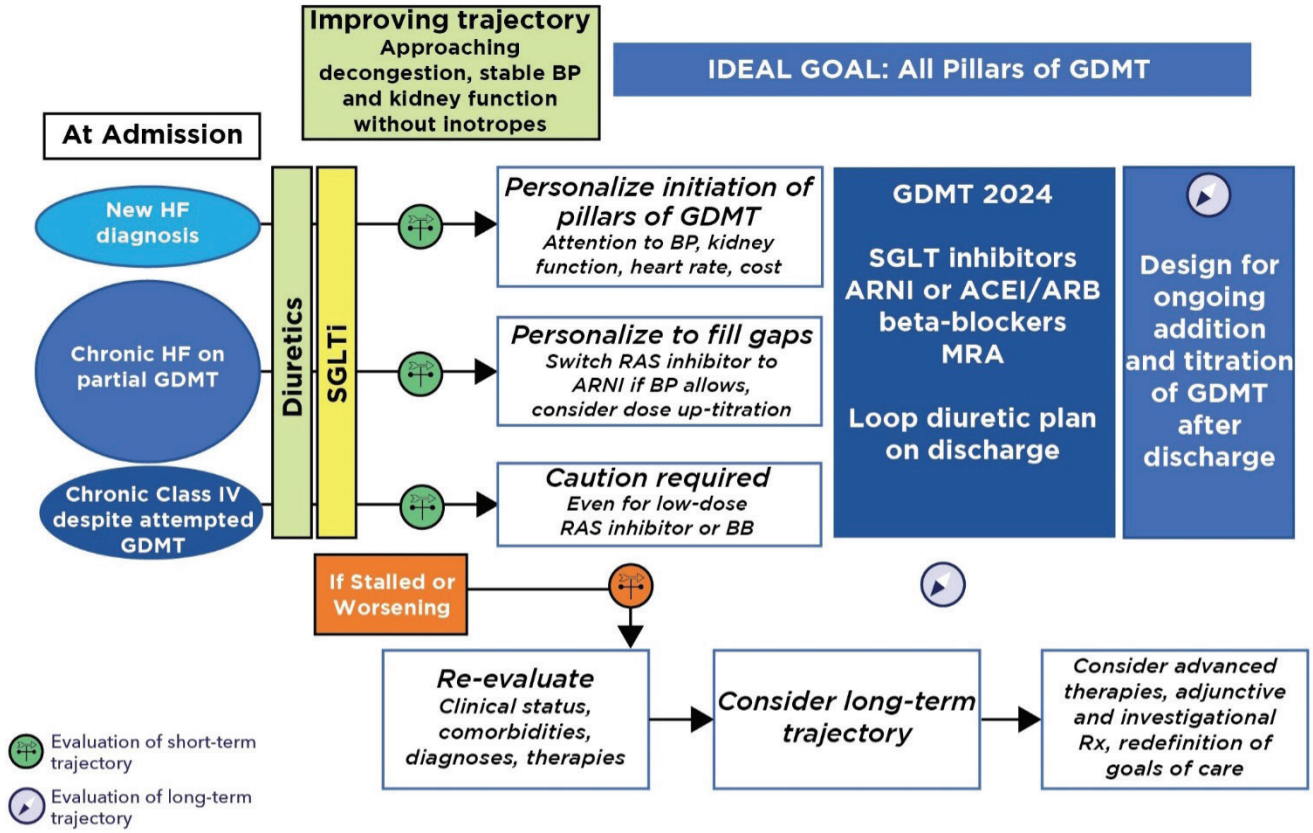
TRANSITION TO ORAL THERAPIES

Titration of GDMT in HFrEF

Figure 7b

Use this figure to guide titration of GDMT in HFrEF based on patient's initial presentation and clinical trajectory.

→ To optimize GDMT, refer to the *2024 ECDP for Optimization of Heart Failure Treatment.*



Titration of GDMT in HFrEF by initial presentation and trajectory. Patients with decompensated HFrEF should be diuresed and started on SGLT inhibitor unless contraindicated or cost prohibitive. Those with an improving trajectory (denoted by the green weathervane icon) should have optimization of GDMT. Patients may have a new HF diagnosis, in which case initiation of all 4 pillars of GDMT should be attempted. Patients with chronic HF on partial GDMT should have personalized therapy to fill in gaps, considering a switch from an ACE inhibitor/ARB to ARNI if appropriate. Caution is required for patients with chronic Class IV HF with decompensated HF; these patients may tolerate even low doses of beta-blockers and RAS poorly, although an attempt at titration may be made. Patients whose short-term trajectory is stalled, or worsening (denoted by the orange weathervane icon) should have re-evaluation of comorbidities and consideration of other diagnoses. The long-term trajectory (denoted by the compass icon) should be reevaluated, with consideration of goals of care, candidacy for advanced therapies, and experimental treatments. The ideal goal is initiation of all 4 pillars of GDMT for HFrEF in the hospital on a baseline of diuretic therapy. A plan for ongoing addition and titration of GDMT after discharge should be fashioned as well.

ACE = angiotensin-converting enzyme; ARB = angiotensin receptor blocker; ARNI = angiotensin receptor/neprilysin inhibitor; BB = beta-blocker; BP = blood pressure; d/c = discharge; GDMT = guideline-directed medical therapy; MRA = mineralocorticoid antagonist; RAS = renin-angiotensin system; SGLT = sodium-glucose cotransporter.

DISCHARGE DAY

Education for Patients, Families, and Caregivers

Figure 10

Use this checklist to guide education for the patient, family, and caregivers. Education provided should be culturally appropriate, and delivered verbally and in written form.

- ☐ Current medications
  - Indication
  - Dose/frequency
  - Potential side effects
  - Potential adherence barriers
- ☐ Activity level
- ☐ Dietary sodium restriction _____mg/day
- ☐ Fluid restriction ☐ Yes _____L/day or ☐ No
- ☐ Daily weight monitoring
  - Has scale ☐ Yes ☐ No
  - Records daily weights ☐ Yes ☐ No
- ☐ Assessment for peripheral edema
- ☐ Smoking cessation counseling for current or recent smokers
- ☐ Substance use counseling, if applicable
- ☐ List of warning signs of decompensation
- ☐ What to bring to each outpatient appointment
  - List of meds
  - Recordings of daily weights
- ☐ Who to call for increased weight / worsening symptoms / ICD discharge

  _____
- ☐ Diuretic management plan
- ☐ Plans for continuation of care
  - Cardiology specialty clinic follow-up appointment _____/_____/_____

DISCHARGE DAY

Model Focused Discharge Handoff

Figure 11

Use this form to convey crucial patient information to continuing care providers to support direct communication. This form is specifically designed to travel with the patient. Areas that are shaded can be formatted as selection menus if this form is being used as a template in a clinical decision tool.

FOCUSED DISCHARGE HANDOFF

Name_____ Age_____ MRN_____ Admission Date___/___/___Discharge Date___/___/___

HF TYPE: ☐ HFrEF ☐ HFpEF (≥50) ☐ HFmrEF (41-49) Last LVEF_____

HF ETIOLOGY: ☐ Ischemic ☐ Non-isch ☐ Other_____

Arrhythmia history ☐ VT ☐ AF ☐ Other Device type_____

Triggers for Hospitalization

_____

_____

CONDITION AT DISCHARGE: ☐ **Discharged to Rehab or other facility**

D/C BP___/___ HR ___ Rhythm ☐ Sinus ☐ AF ☐ paced **Weight** At D/C ___lbs Est. target weight ___lbs

Residual congestion at D/C ☐ **Y** ☐ **N** **Edema 0-4+**_____ **JVP**_____ **Rales** ☐ **Y** ☐ **N** **Ascites** ☐ **Y** ☐ **N**

If still wet, limited by ☐ Dominant R heart failure ☐ Kidney function ☐ Hypotension ☐ Other

Kidney Function Discharge BUN/Cr_____ eGFR_____ Worst CR in hospital_____ Baseline_____

Biomarkers Admission BNP/proBNP_____ "Dry" BNP/proBNP (if known)_____

Comorbidites: _____

Psychosocial Factors_____

Other hospital events ☐ code ☐ sepsis ☐ dialysis ☐ intubation IV inotropes used? ☐ **Y** ☐ **N**

Code Status ☐ Full code ☐ Full code but discussed ☐ DNR/DNI ☐ DNI only ☐ *POLST* ☐ *Needs discussion*

DISCHARGE HF MEDICATIONS:

Diuretic Loop_____dose/freq_____. Metolazone dose/freq_____ Other: dose/freq_____

In-hospital effective loop dose ___mg IV ☐ Daily ☐ BID ☐ TID ☐ Drip at ___mg/hr Metolazone used? ☐ **Y** ☐ **N**

Triggers for rescue dose: If _____lbs up, or_____(sentinel symptom)

Rescue dose _____orally and/or metolazone _____for_____days before recheck

K+ replacement_____meQ/day Plan for more K+ with rescue dose? ☐ **Y** ☐ **N**

GUIDELINE DIRECTED MEDICAL THERAPY:

RAS meds ACEI_____mg/day ARB_____mg/day ARNI _____mg/day Dose ↓in hospital? ☐ **Y** ☐ **N**

If not given or dose ↓, why? ☐ Hypotension ☐ Dizziness ☐ Kidney fx ☐ Cough

If no ARNI, why? ☐ Hypotension ☐ Cost ☐ Hyperkalemia ☐ Angioedema

Beta-blocker_____mg/day Dose ↓ in hospital? ☐ **Y** ☐ **N**

If not given or dose ↓, why? ☐ Hypotension ☐ bradycardia

MRA ☐ **Y** ☐ **N** If not, why not? ☐ Hypotension ☐ Kidney function ☐ Hyperkalemia

SGLTi ☐ **Y** ☐ **N** If not, why not? ☐ Kidney function ☐ DKA ☐ UTI/GMI ☐ Cost

PLAN

☐ **Start** ☐ **Titrate**

☐ △ **ARNI**

☐ Start ☐ Titrate

☐ Start ☐ Titrate

☐ Start ☐ Continue

Other HF meds Hydral/nitrates ☐ **Y** ☐ **N** Ivabradine ☐ **Y** ☐ **N** Digoxin ☐ **Y** ☐ **N** Inotropes ☐ **Y** ☐ **N**

- Anticoagulation *for* ☐ AF ☐ DVT/PE ☐ Mech valve ☐ LV thrombus ***with*** ☐ DOAC ☐ Warfarin
- Antiplatelet *for* ☐ ACS ☐ PCI ☐ Stroke/TIA ***with*** ☐ ASA ☐ Clopidogrel ☐ Prasugrel ☐ Ticagrelor
- Antiarrhythmic ☐ Amiodarone ☐ Dofetilide ☐ Sotalol ☐ Other _____

See patient discharge document and full discharge summary for complete medication list

FOLLOW-UP: Follow-up team_____ Appt date and time_____

Home health referrals (visiting nurses, PT, home infusion)_____

Post-discharge labs: Will be drawn at: _____ Results sent to _____

HF medication refills to_____

For worsening heart failure, contact_____ Phone Number_____

For non-cardiac issues, contact_____ Phone Number_____

Other clinicans_____ ☐ Research Study_____

Additional support needed for optimal care:_____

Click to download this PDF form

DISCHARGE DAY

Checklist for Communication to Continuing Care Providers

Figure 12

Use this checklist as a guide for communication with continuing care providers about pertinent patient information and potential issues.

HOSPITAL COURSE

- ☐ Reason for admission
- ☐ Sentinel symptoms
- ☐ Congestion status
  - Admission, discharge, and target weight
  - Admission and discharge kidney function
  - Diuretic dosing
  - Rescue dosing
- ☐ Unexpected events

PLANNED THERAPIES AND MONITORING

- ☐ Plan for initiation, titration, and optimization of GDMT
  - ARNI/ACEI/ARB
  - Beta blockers
  - Aldosterone mineralocorticoid antagonists
  - SGLT inhibitor
  - Ivabradine
  - Hydralazine/isosorbide
- ☐ Adjustment of diuretics
- ☐ Plan to monitor electrolytes and kidney function
- ☐ Follow-up for pending or planned diagnostic tests
- ☐ Plan for EP consult if sudden death risk or potential candidate for device therapy OR AF
- ☐ Recommendations for when to assess response to therapy and in what venue (in person vs telehealth)
- ☐ COVID, Pneumovax and Influenza vaccination

FOLLOW-UP RELATED TO COMORBIDITIES

- ☐ Kidney function
- ☐ Diabetes
- ☐ Sleep-disordered breathing
- ☐ Depression
- ☐ Anemia
- ☐ IV iron given?
- ☐ Other

POST DISCHARGE FOLLOW-UP

Checklist for Follow-Up Phone Call

Figure 13

Use this checklist to help organize and streamline the follow-up phone call to ensure that it is comprehensive yet focused.

Early Post-Discharge: Checklist for 48-72 Hour Follow-Up Phone Call

INTRODUCTION: My name is _____. I am calling from (either provider's office or hospital, depending on care coordination structure) to see how you are feeling and after your recent discharge from the hospital.

TOPIC	VITAL QUESTION	CAUSE FOR IMMEDIATE CONCERN	TEACHING POINTS TO BE COVERED IN CALL/CLINIC, USING TEACH BACK
Symptoms Sentinel symptom from hospitalization Shortness of breath Orthopnea Edema	How is _____? ☐ Same ☐ Better ☐ worse than at discharge	Alert If WORSE	Do you know what symptoms you should be paying attention to?
Dizziness	Are you having trouble with dizziness? ☐ Yes ☐ No Is it just when you first stand up or does it last longer? _____	FREQUENT DIZZINESS	Review dizziness as potential symptom of concern
Daily Weights	Are you weighing yourself daily? ☐ Yes ☐ No If not, do you have a scale? ☐ Yes ☐ No What was your first weight at home after discharge? _____ What is your weight now? _____	ALERT If no weights or if weight increase > trigger	Importance of weights as short-term indication of fluid balance. Review diuretic plan from discharge Do you have a plan for what to do if your weight increases?
Medications (Refer to discharge list)	Do you have these medications prescribed at discharge? ☐ Yes ☐ No Do you know how to take them? ☐ Yes ☐ No Do you think you are having side effects from any of them? _____	ALERT If Not obtained, Or not taking correctly	Types and purposes of HF medications
Salt restriction	Are you watching your salt intake? ☐ Yes ☐ No What is your daily limit? _____ What are you doing to make sure you don't eat too much salt? _____		Review contribution of salt to fluid retention Common high-salt items How to read labels
Fluid restriction (for patients who have one)	Are you keeping track of your fluid intake? ☐ Yes ☐ No What is your daily limit? _____ What are you doing to stay within your limit? _____ _____		Review contribution of fluid to symptoms, Importance of fluid restriction for fluid balance and how to account for fluids in food as well as beverages. Reassure this is often not a sign of dehydration in heart failure Present alternatives such as frozen fruit, etc
Follow-up	When is your follow-up appointment? and in what venue (in person, telehealth)? _____ If going in person, do you have a way to get there? _____	NO follow-up appt or no way to get there	
Physical Activity			Consider cardiac rehabilitation

POST DISCHARGE FOLLOW-UP

FIrst Post-Discharge Visit Checklist

Figure 14

Consider the key components listed in this checklist to guide the first post-discharge visit to reassess clinical status, review medications, provide additional education, and address issues that may lead to worsening HF.

☐ **History**
- Discharge summary reviewed.
- Etiology of cardiomyopathy identified.
- Precipitant of exacerbation identified.
- Heart failure compensated?
  - NYHA class.
  - Weight log reviewed?
  - Symptoms reviewed?
- Important concomitant disease states
  - CKD
  - Diabetes
  - Hypertension
  - AF
  - COPD
  - OSA
  - Others

☐ **Goals of Care changed**

☐ **Physical Exam**
- Vital signs
- BMI
- Orthostatic blood pressure
- Jugular venous distention
- Rales +/-
- "cold/warm", "wet/dry" profile
- S3 present/absent

☐ **Diagnostic Testing**
- Basic metabolic panel
- Complete blood count
- BNP or NT-proBNP
- Liver function panel (per discretion of clinician)
- Iron studies (per discretion of clinician)
- High-sensitivity Troponin, sST2, Gal-3 (per discretion of clinician)
- 12-lead ECG
- Chest x-ray (per discretion of clinician)
- Review LVEF (__%). If not available, attain TTE
- Follow-up EF:
  - 40 days post-MI
  - 3 months post-NICM
- Ischemia Evaluation Needed?

☐ **Medications**
- Comprehensive medication reconciliation
- Beta-blocker
  - Dose optimized?
- ARNI/ACEI/ARB
  - Dose optimized?
  - Eligible to switch to ARNI?
- Mineralocorticoid antagonist
  - Dose optimized?
- SGLT inhibitor
- Diuretic agents
  - Dose adjustment?
- Ivabradine? (Consider initiation if heart rate remains elevated despite beta-blocker optimization)

☐ **Interventional therapies (if applicable)**
- Revascularization
- CRT
- ICD
- AV node or AF ablation
- Valvular intervention
- Remote monitoring

☐ **Patient education**
- Importance of adherence
- Medication education
- Dietary education
- Activity education
- Smoking cessation
- Alcohol consumption
- Follow-up appointment scheduled
  - ☐ In-person
  - ☐ Telehealth

☐ **Consultations**
- Home health services
- Cardiac rehab referral
- Advanced heart failure clinic referral
- Palliative/hospice referral

PALLIATIVE CARE

Aspects of Palliative Care

Figure 15

Consider the aspects of palliative care listed in the figure to help set goals around advance care planning.

This figure reflects recent data and publications, including:

1. A study demonstrating that a palliative care referral trigger tool decreased hospital readmission rates up to 90 days postdischarge while also increasing the completion of advanced directives.

2. The 2022 AHA/ACC/HFSA HF Guideline, which advocates a need-based approach to palliative care, with emphasis on shared decision-making, caregiver and bereavement support, and hospice care.

HF = heart failure; ICU = intensive care unit

PALLIATIVE CARE

Goals of Care/Advance Care Planning

Table 9

The table is intended to guide clinician-patient discussions on goals of care and advance care planning.

Advance Care Planning Discussion

Assess Readiness to Discuss Goals of Care
Assess Understanding of Prognosis
Confirm/Discuss Goals of Care • Confirm/Elicit patient values and preferences pertaining to quality of life and life prolongation (cultural, religious). • Discuss aspects of what the patient would consider an unacceptable quality of life. • Discuss benefits/burdens of reasonable therapeutic options.
Confirm/Establish Surrogate Decision Maker • Person best able and willing to represent patient's values and preferences and patient's best interests.
Establish/Reassess Code Status • Based on Goals of Care Discussion. • Do Not Attempt Resuscitation (DNAR). • Full Code. • Attempt shock without other measures.
Discuss Management of Defibrillator when appropriate • Pacing function is often left intact even if defibrillation is deactivated.
Determine need for specialist palliative care consultation

Links to Additional Resources

ACC Resources:

TreatHF App:
Tools.ACC.org/TreatHF/

HF Advance Care Planning Toolkit:
CvQuality.ACC.org/clinical-toolkits/advance-care-planning-toolkit

HF Condition Center:
CardioSmart.org/Heart-Conditions/Heart-Failure

HF Action Plan:
CardioSmart.org/MyHFActionPlan

HF Infographics:
CardioSmart.org/~/media/Images/Infographics/2016/Heart%20Failure%20resize.ashx

CardioSmart.org/~/media/Images/Infographics/Heart-Failure-Journey.ashx

2022 AHA/ACC/HFSA Guideline for the Management of Heart Failure:
https://www.jacc.org/doi/10.1016/j.jacc.2021.12.012?_ga=2.74773586.1174326798.1737484184-1586257890.1733853887

2024 ECDP for Optimization of HF Treatment:
https://www.jacc.org/doi/10.1016/j.jacc.2023.12.024?_ga=2.3585904.1174326798.1737484184-1586257890.1733853887

2024 ECDP Focused Update of the 2019 ACC ECDP on Heart Failure Hospitalization:
https://www.jacc.org/doi/10.1016/j.jacc.2024.06.002?_ga=2.6160243.1174326798.1737484184-1586257890.1733853887

2019 ACC ECDP on Heart Failure Hospitalization:
https://www.jacc.org/doi/pdf/10.1016/j.jacc.2019.08.001?_ga=2.74896466.1174326798.1737484184-1586257890.1733853887

External Resources:

HFSA Advanced Care Training Module:
HFSA.org/wp-content/uploads/2018/03/HFSA-Module-9-03.14.2018-LR.pdf