

## **Documentation in the Electronic Health Record (EHR)**

The below phrases are documented by clinicians when a patient returns to the office after having their goals and care preferences elicited and their template reviewed. Clinicians free-text (or use macros/smart text) these phrases and any additional pertinent information in the Discussion/Summary section of the EHR notes.

### **For Initial Patient Priorities Care Visit:**

- These decisions were based on the patient's specific health outcome goals, care preferences, and likely health trajectory.
- This decision (ie. \_\_\_\_\_) was based on the patient's specific health priorities, including their health outcome goals and care preferences.
- I spent \_\_\_\_ minutes (or > 50% time) in counseling and decision making related to the patient's specific health outcome goals and care preferences.
- I spent \_\_\_\_ minutes in counseling related to the patient's specific health priorities, including their health outcome goals and care preferences. We made decisions based on these. More than 50% of this time was spent on education about tradeoffs and health trajectory.
- The patient's health outcome goals are not yet aligned with their care preferences. We will have further discussions

### **For Follow-Ups/Ongoing Care:**

- "I reviewed patient's health outcome goals and care preferences with patient"
- "I addressed the patients specific ask which was \_\_\_\_\_"