



Choosing what matters.
Doing what works.

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 patient's One Thing which was _____"