

A Guide to Using Decision Worksheets in the Office Visit

The Decision Worksheet is a short tool designed to make shared decision making conversations easier. The Decision Worksheet helps you and your patient work through options, key benefits and harms, and design a plan for management. The grid format covers treatment options, with short frequently-asked questions and answers.

The tool is not intended to be used as a stand-alone decision aid, or to be a comprehensive set of information, but rather it is best used during the consultation to guide discussion and elicit patient preferences, values, and concerns.

A Short Guide to Using a Decision Worksheet

- **Introduce decision:** “As we discussed last time, your cholesterol test was high and there are some different options that we can take.”
- **Describe** the goal of grid: “In order to make a decision about the treatment that is best for you, we should review your options together. Here’s a print out that summarizes some key options and the information about them.”
- **Check** to see if patients wish to read it themselves or have you talk through the information with them. (If they wish to read it you can say something like, “Please take your time; I will be checking something on the computer while you review the print out.”)
- **Hand over** to patients, with pen: “Please circle things you wish to talk about or have concerns about.”
- **Encourage** questions and discussion: “I see you circled X; what questions do you have about that side effect? If you are very worried about X then we might try some of these other options.”
- **Add** your own opinion: If there is an option or issue that you want to make sure to discuss with the patient, add it to the grid, circle it and cover that issue. “It’s not listed, but for you, quitting smoking is important to discuss as we think about managing high cholesterol and risks of heart disease.”)
- **Give** the grid to patients, so that they can continue deliberation and/or discuss options with others: “We’ve decided not to start a new medicine for your blood sugar just yet; please think about the treatments we talked about and let’s plan to follow up by phone next week.”

Where to access: Primary Care office InSite (PCOI) > Patient Ed > Shared Decision Making Resources > Decision Worksheets

Source: The Decision Worksheet was based on the 6 Steps of Shared Decision Making from R. Wexler, the Informed Medical Decisions Foundation and Option Grids from G Elwyn.

Feedback on your experience using this tool is welcome; please email the Shared Decision Making Program team at decisions@partners.org.