

THE DOCUMENTATION DEFENCE™

Clinical Decision-Making Prompt Sheet

Finding. Meaning. Decision. Plan.

Educational prompt only. Adapt it to the patient, treatment, your profession, scope, current guidance, insurer terms, clinic policy and record system. This is not legal advice and does not certify compliance. Do not place identifiable patient information in an unsecured copy.

1. Finding

What patient-specific history, preference, assessment finding or uncertainty mattered?

Record the actual finding and its source

2. Meaning

What was your clinical view at that time? Separate observation, patient report and opinion.

Record your working view and any uncertainty

3. Decision

Did you proceed, modify, defer, decline, refer or arrange review? Why was that the proportionate decision?

Record the decision and reason

4. Plan

What was discussed, advised, monitored, handed over or scheduled next? Who owns it?

Record the next action, timing and owner
