

Shared Decision-Making Checklist for Patients and Caregivers

We often rely on our doctors to tell us what care we need. But to get the best care, you and your doctor make decisions together. This process is called “**shared decision making**.” Your doctor shares medical expertise, and you share what you want out of your care. Then you make a decision together.

If your healthcare team has not spoken about shared decision making, you can still engage in the process. Refer to this checklist to start the shared decision-making conversation.

Before Your Appointment/Discussion: Think about What Matters to You and Write it Down

- What would you like to ask and know about your condition and treatment options?
- What matters most to you in life? What are your goals for treatment—for example, to manage symptoms or to be able to do things you are currently unable to do? Think about your goals for treatment, what matters to you. A nurse, social worker or primary care provider may also be able to help you discuss your goals and wishes.
- Is cost an important part of your decision?
- If a caregiver or family member is involved in your care, does he or she know your goals and wishes? If not, discuss them.
- Refer to advance care planning [resources](#).

During Your Appointment/Discussion: Ask Questions; Express Your Goals and What Matters

Ask a family member or caregiver to join/attend and take notes that you can refer to later.

- I would like to make this decision together with you based on my goals and what matters most to me and on your expertise.
What I would like most from life is...
What matters most to me is...
What I am most afraid of is...
Are there decision tools we can use to make this decision together? How can I learn more about my condition and my options?
- What are my options for treatment?
- What are the benefits of the options?
- What are the risks to me if I choose this option?
- What if I don't want to do anything?

- I understand it could be helpful to let you know about my advance care plans and code status. I would like to discuss that with you.
 - What are the costs associated with each of the options? Whom can I speak with to learn more about the treatment and how I can pay for them?
 - For my specific goals and condition, what would be my best options?
 - I don't understand. Can you explain this to me a different way?
 - Can I contact you with questions?
 - Can you give this information to me in writing?
 - What are the next steps?
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After Your Appointment

- Keep the notes in a handy place so that you can refer to them later.
- If you are unclear on next steps, ask!
- If you need more time to make a decision, let your caregiver and healthcare team know.

Read our FH® Insurance Basics article on [palliative care and shared decision making](#).

References:

1. [AHRQ SHARE Approach to Shared Decision Making](#)
2. [AHRQ, Using the Teach-Back Technique: A Reference Guide for Health Care Providers](#)
3. [AHRQ, Communicating Numbers to Your Patients: A Reference Guide for Health Care Providers](#)
4. Glyn Elwyn et al., "A Three-Talk Model for Shared Decision Making: Multistage Consultation Process," *BMJ* 359 (November 2017): j4891, <https://doi.org/10.1136/bmj.j4891>.