Patient Assessment Templates

Center to Advance Palliative Care™

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This resource provides guidance for designing a patient assessment template and offers sample forms that meet quality assessment and documentation standards, and promote ease in billing and coding.

To create a template that works for the team, the process should be collaborative.
1) Create a document with input from all team members and disciplines.
2) Meet with coding and billing personnel so they can ensure key documentation areas are listed in the template for billing and coding purposes.
3) Work with Information Technology (IT) staff early in your tool development to assist with efficiently pulling information from a patient's record. This is particularly necessary when an organization uses a large electronic health record (EHR) (e.g. Allscripts, EPIC, CERNER, etc.) Many palliative care services use these products and have created templates from which to work.

Template Design Resources
→ Sinclair C, Krutka A, et al. Documentation Design: Palliative Care Notes in the EHR Era (FR453). Journal of Pain and Symptom Management. 2018. 55(2):619 – 62.
→ Quill T. The Initial Interview in Palliative Care Consultation. July 18, 2019. Waltham, MA: UptoDate. https://www.uptodate.com/contents/the-initial-interview-in-palliative-care-consultation Accessed August 21, 2019.
→ Montagnini M, Bailey A, Lorenz, KA, McNamara, MR, Weinstein K, Wertheimer S, Debra et al. What Should Be in a Palliative Care Consult? Using a Standardized Template for Patient Assessment (P2). Journal of Pain and Symptom Management. 2012,43(2): 314 – 315.
→ Von Gunton C, Weissman D, Palliative Care Fast Facts 267-Writing the Consultation Note. Appleton, WI: Palliative Care Network of Wisconsin. 2015. https://www.mypcnow.org/fast-fact/consultation-etiquette-in-palliative-care/ Accessed August 21, 2019.

Resource for Tools to Use in Templates
→ Aslakson R, Dy SM, Wilson RF, Waldfogel JM, Zhang A, Isenberg SR, Blair A, Sixon J, Robinson KA. Assessment Tools for Palliative Care. Technical Brief No. 30 (Prepared by Johns Hopkins University under Contract No. 290-2015-00006-I.) AHRQ Publication No. 14-17-EHC007-EF. Rockville, MD: Agency for Healthcare Research and Quality; May 2017. https://effectivehealthcare.ahrq.gov/sites/default/files/pdf/palliative-care-tools_technical-brief-2017.pdf

Template Samples
Four sample patient assessment templates from three community-based palliative care programs follow.
1. Lehigh Valley Network OACIS/ Palliative Medicine, Lehigh, PA: Palliative Care Home Visit Template
2. Presbyterian Outpatient Palliative Care Program in Albuquerque, NM: Palliative Care Outpatient/Clinic and Home Visit Template
3. M Health - Fairview in Minneapolis, MN: Palliative Outpatient/Clinic Visit Template
4. M Health - Fairview in Minneapolis, MN: Palliative Care Social Work Visit Template

Note: several of the templates include symbols to denote information is being imported from the patient's electronic record or must be completed. Key: *** = required field, @ = choice of pop-up menu, { } = required completion of a particular assessment such as male or female physical exam or advance care planning.