

Guided Notes

Instructions for Use:

- 1. Fill in patient demographics and medical history.
- 2. Document the patient's chief complaint, including relevant details.
- 3. Conduct a thorough assessment, including vital signs, physical examination, and diagnostic tests.
- 4. Develop a comprehensive plan tailored to the patient's needs, including treatment, education, and referrals.
- 5. Collaboratively set patient goals and action steps.
- 6. Use the additional notes section for any pertinent information.
- 7. Review and discuss the guided notes with the patient, ensuring clarity and understanding.
- 8. Keep the completed template as part of the patient's medical record.

Patient Information:

Name:

Age: **Gender:**

Date of Visit:

Medical History:

Current Medications:

Chief Complaint:

Presenting Problem:

Duration:

Severity:

Aggravating Factors:

Alleviating Factors:

Assessment:

Vital Signs:

Physical Examination Findings:

Diagnostic Tests Ordered:

Differential Diagnoses:

Plan:

Treatment Plan:

Patient Education:

Referrals:

Follow-up Instructions:

Patient Goals:

Short-term Goals:

Long-term Goals:

Action Steps:

Expected Outcomes:

Additional Notes: