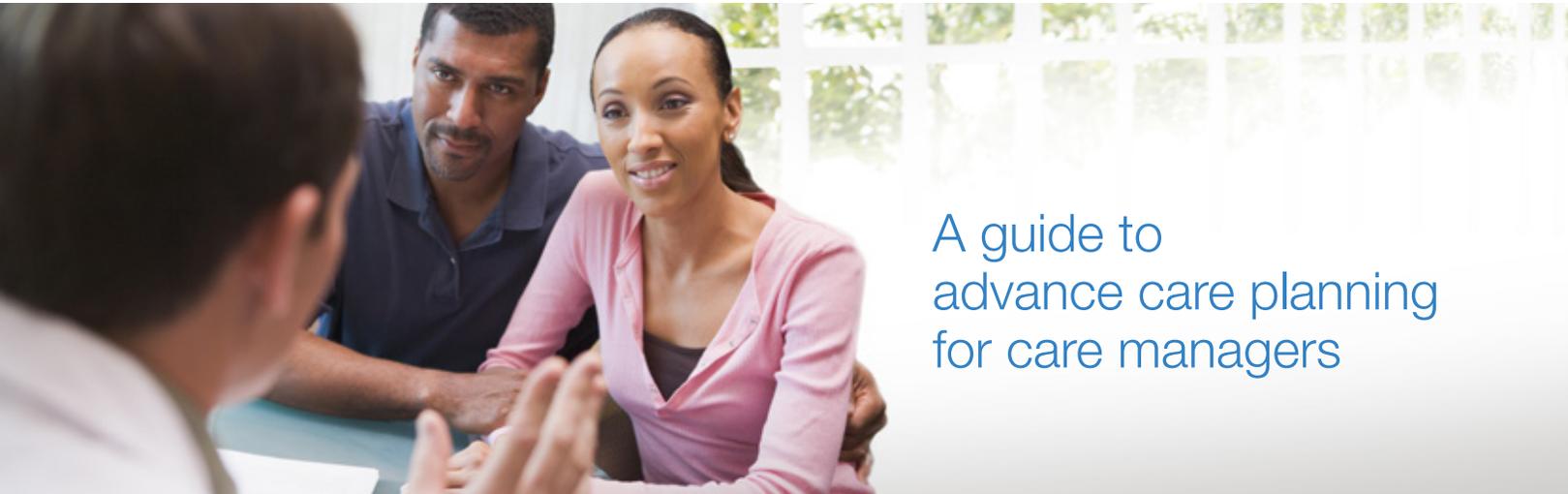


Their choice. Their voice.



A guide to advance care planning for care managers

Discussion guide overview

This **Care Forward** resource is designed to help you during discussions with patients as they progress through the advance care planning journey. The guide is intended to:

- Help you understand key aspects of the advance care planning discussion
- Outline key messages and best practices to ensure an optimal discussion
- Supplement and reinforce the content in the **Care Forward** patient resources

Make sure that your patients have the **Care Forward** patient brochure on hand during their discussions with you and their healthcare team to ensure everyone will be using the same terminology.

Importance of advance care planning

Advance care planning is all about patients expressing their wishes and talking about the kind of healthcare they would or wouldn't want if they could not speak for themselves. Advance care planning conversations can engage and empower patients to make their own healthcare choices while helping you identify and clarify their values and preferences regarding medical treatments and life-sustaining care.

What you can do as a care manager

As a care manager, you can play a vital role by initiating and facilitating advance care planning conversations. By reinforcing the importance of advance care planning for all adults and showing your patients how to create an advance care plan, you can help them find peace of mind in knowing they are better prepared for their future care.

5 steps of advance care planning

Make the most of your advance care planning discussions with patients by making it personal and meaningful for them. Use this companion guide to reinforce the content in the **Care Forward** patient brochure as you encourage patients to find their voice and complete the 5 steps of their advance care planning journey.



STEP 1

Thinking about goals and what is important

Personal goals and healthcare preferences are the foundation of every advance care plan. Asking patients to think about questions like these will help put the importance of advance care planning in perspective:

- What makes life meaningful for you (eg, family, friends, career, and hobbies)?
- What kind of medical care would you want—or not want—and where would you want to receive that care?
- What are your goals for care (eg, comfort, longevity, function)?
- Do you have religious or cultural beliefs that you would want your doctors to honor?

Plant the seed by encouraging your patients to think about what is important to them and what kind of care they would want (or not want). Then schedule a time to revisit the conversation and complete Step 2.

STEP 2

Talking about health and treatment options

It is important for patients to talk with their healthcare team. Encourage them to ask questions, and remind them that it's okay to speak up if there's something they don't understand. Here are a few key topics patients should discuss with their healthcare team:

- Potential health outcomes based on current health status
- Treatment and life-support options that may be available, including the pros and cons of each
- The difference between DNR (do not resuscitate) and DNI (do not intubate)

Don't stop with this conversation. After talking about treatment options and answering any questions your patients may have, prepare for Step 3 by asking patients to finish this sentence: "The person I trust most to carry out my healthcare wishes is..."



STEP 3

Choosing a healthcare decision maker

A healthcare decision maker (or healthcare proxy) is the person patients trust to be their voice if they cannot make their own healthcare choices. To help patients choose the best healthcare decision maker, ask them to consider these questions:

- Will your healthcare decision maker be able to honor your healthcare wishes, even if his or her own values or wishes are very different?
- Will he or she be comfortable asking questions of busy doctors or other providers?

Many people may confuse a healthcare proxy with a power of attorney, so remind patients that a healthcare decision maker does not have power over non-healthcare matters, such as financial or business decisions.



STEP 4

Recording decisions in an advance care plan

Now that your patients have thought about and discussed their healthcare choices, they are ready to complete their advance care plan. An advance care plan, or advance care directive, includes a living will and a durable power of attorney (DPOA) for healthcare. You should remind patients that:

- A living will and a DPOA for healthcare are legal documents that must be signed and witnessed (or notarized)
- Different states have different forms, which are available online at sites such as www.CaringInfo.org

Explain that a living will and DPOA for healthcare are legal documents. You may want to suggest that patients seek assistance from an attorney or notary public as needed to help complete their forms and get them witnessed or notarized.



STEP 5

Sharing their plan

Your patients are now ready to share their plan with the significant people in their lives. Stress the importance of this final step and remind patients to:

- Make several copies of the documents and store the original papers in a safe place where others can easily access them (eg, an unlocked filing cabinet or desk drawer)
- Give a copy to everyone who might be involved in their healthcare
- Consider filing a copy with their local hospital or with an online service

Offer to keep a copy of your patient's advance care plan on file with your organization, if this option is available, and make sure the patient's records are updated with a notation referencing the plan.

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Your checklist to ensure optimal advance care planning discussions

As a care manager, you can play an important role in discussing and explaining the 5 essential steps in the advance care planning journey with your patients. Throughout this process, make sure that your patients have:

- ✓ Received the corresponding educational resources
- ✓ Understood what an advance care plan is and why it's important
- ✓ Thought about their values, wishes, and healthcare instructions
- ✓ Started conversations around advance care planning with their doctors, healthcare team, and loved ones
- ✓ Identified a proper healthcare decision maker
- ✓ Shared their advance care plan with their family, healthcare team, and other important people

Using the 5 steps to guide the conversation, you can empower your patients to create an advance care plan so they can make their healthcare choices known should they become unable to speak for themselves.



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The information in this guide should not replace the directions and advice of the healthcare provider.

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