



PREPARE™

for your care

Guide for Using PREPARE for Your Care

**For Community &
Healthcare Organizations
Interested in
Advance Care Planning**



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PREPARE™ for your care

PREPARE for Your Care™ ([PREPARE](#)) is an easy-to-use, online, secure, ACP program that uses video stories and easy-to-read advance directives to help prepare people for communication and medical decisions based on their values, both now and in the future.

Why PREPARE?

Evidence-based. PREPARE is the only patient-directed ACP program that has been designated as an [Evidence Based Program by the National Council on Aging](#) and is based on decades of [research](#) at The University of California San Francisco.

Proven outcomes. In randomized trials with over 1,400 participants, PREPARE increased ACP in 98% of English and Spanish speaking older adults, including 43% new medical record documentation.

Easier for clinicians. PREPARE primes patients, and their family members, to have high-quality conversations with clinicians, significantly reducing the time and stress clinicians face when starting these conversations.

Accessible to all. The PREPARE online program is available in English and Spanish. In addition, the easy-to-use advance directives are legally compliant in all 50 states and Washington, DC, and are available in English, Spanish, and growing number in Chinese and other languages. The PREPARE program addresses limited health and digital literacy, as well as visual, hearing, and cognitive impairment. It has been proven to reach socially and economically disadvantaged populations and to reduce disparities in ACP.

Customizable. PREPARE can provide content to organizations to use in their work streams and interfaces.


Ongoing updates. PREPARE keeps all advance directives and materials current by monitoring changes in state laws to ensure compliance.

What our partners say:

| | | | |
|---|---|---|---|
| <i>“PREPARE is the gold standard of ACP”</i> ~ Healthcare Leader | <i>“After seeing examples on the website, deciding on my own wishes is a lot easier for me now.”</i> ~ Patient | <i>“It [PREPARE] breaks it down to doable actions, instead of walking into a fog of what ACP is all about.”</i> ~ Patient | <i>“Patients come to their visits prepared, making ACP easier and more efficient.”</i> ~ Clinician |
|---|---|---|---|

Partner with us:

Licensing Opportunities



PREPARE and the University of California Regents offer several [licensing opportunities](#) which include branding our materials with your institution’s logo and colors, creating organization specific URL’s and a customized website landing page, and integrating your organization’s branded advance directives into online PREPARE platform. Data reporting and research licenses are also available. Please contact info@prepareforyourcare.org for additional information ([Terms of use](#)).

WHAT IS PREPARE FOR YOUR CARE?

[PREPARE for Your Care™](#) (PREPARE) is a person-centered, easy-to-use, online, secure, advance care planning (ACP) program in English and Spanish that uses video stories to help people prepare for health care communication and decision making. It can be used by the public and by health systems, medical providers, and community-based organizations.

The PREPARE program also provides easy-to read advance directives in English and Spanish for every state in the U.S. (with a growing number in Chinese and other languages). These directives are unique in that they focus on peoples' values and quality of life and provide space for people to explain their choices. This type of information is invaluable for honoring peoples' wishes.

Rather than only focusing on checkbox, end-of-life preferences, the PREPARE online program and advance directives helps people identify what is important for their quality of life. It also prepares people, through video stories, to communicate with others and make medical decisions based on their values both now and in the future.

In addition, the program provides easy-to-use training materials for clinicians and others to start an ACP conversation, and easy-to-read ACP materials in several languages they can provide to their patients and clients.

The PREPARE for Your Care™ online program and advance directives are evidenced-based with [substantial research](#) demonstrating their efficacy and effectiveness, including in randomized controlled trials. In addition, PREPARE and the easy-to-read advance directives were designed for use *outside of the clinical encounter to decrease clinician time*.



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PREPARE for Your Care™ features a versatile set of resources that can be used in different ways and in many different settings. For example:

Community Organizations can:

- Provide the PREPARE [pamphlet](#) in offices, clinics, public spaces to introduce the ACP and the program broadly.
- Conduct group education events using the [Movie Event Toolkit](#) from PREPARE.
- Provide copies of the PREPARE state-specific, legally valid [advance directives](#) to your community.
- Make information about ACP and PREPARE tools part of your usual community outreach in newsletters and social media.

Healthcare Organizations/Systems can:

- Use the PREPARE program and videos as pre-work to prime patients before a clinic visit.
- Provide easy-to-use PREPARE advance directives. Health systems, clinicians, and organizations can download easy-to-read PREPARE state-specific [advance directives](#). An individual may begin completing the advance directive with help from the PREPARE for Your Care™ website. They may then be empowered to discuss with their family, friends, and clinicians based on the video instructions provided.
- Use a variety of strategies to fit the individuals' desired engagement with ACP, including:
 - Send messaging about ACP and links to PREPARE resources through the patient portal;
 - Provide PREPARE URL and website information;
 - Provide written materials; and
 - Provide the PREPARE website before or after a visit with an ACP Facilitator.
- Use the PREPARE for Your Care™ [Simple Scripts](#) to help clinicians introduce ACP and the PREPARE [online interactive program](#) and advance directives.
- Conduct group medical visits in person or virtually using the PREPARE videos and [Movie Event Toolkit](#).



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As with any new initiative, there are several steps that your organization can take to create a successful ACP program and implement PREPARE for Your Care™. Some of these may be combined or skipped, depending on the needs of your organization.

- [Gauge interest](#)
- [Assess readiness](#)
- [Create a plan](#)
- [Implement the plan](#)
- [Sustain the work](#)

Our team adapted the [Practical, Robust, Implementation and Sustainability Model \(PRISM\) framework](#) to help you better understand your environment, as well as the barriers and opportunities that exist within your organization.

We have placed key questions of this framework into the relevant engagement sections noted above. Answering these PRISM questions can help ensure your organization is ready to implement ACP and if not, what you may need to do to move the implementation process forward.

Please review the following pages for ideas about how to create an ACP engagement process that is best for your organization and situation.



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GAUGE INTEREST

To get started, it is helpful to “take the pulse” of relevant leadership and staff to understand their knowledge of and interest in advance care planning (ACP). This can be done in informal conversations or over e-mail and can probe for what they know about ACP and various ACP tools and resources, including PREPARE. To provide more information, you can refer people to [this article that defines ACP](#) and to the [PREPARE for Your Care™ website](#).

Here are some helpful questions to help you consider important issues in your organization that may affect the success of an ACP implementation effort, adapted from the PRISM framework.

With this reconnaissance in hand, it is often helpful to hold an introductory meeting to describe ACP and PREPARE with relevant leadership and staff. This may be a standalone gathering or could be part of an already scheduled meeting.

| Organization Characteristics | |
|------------------------------|---|
| | What are the competing demands of your organization that would make ACP difficult? |
| | What are the resource barriers to success in implementing ACP and PREPARE materials? |
| | What are the organizational cultural barriers to ACP? To PREPARE materials? |
| | Will the organization allow the use of existing staff to work on ACP? |
| | Is there an internal champion for ACP who will do the day-to-day work? Is there an organization leader who will also champion and/or approve this work? |
| | Are there any staff incentives for yourself or for your patients (e.g., quality metrics for clinicians) for doing ACP? |

In your [presentation](#), you will want not only to explain the importance of ACP in delivering high quality, person-centered care, but also to articulate the benefits of ACP for your patients/community and your organization.

You may want to show some of PREPARE’s easy-to-access materials that could be used to help your patients/clients do ACP, either on their own or with support from clinicians and staff.

Based on the reaction to the presentation, you will want to seek approval to continue to explore ACP and PREPARE, make additional presentations, if needed, and to conduct a more thorough readiness assessment.



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ASSESS READINESS

Once you're confident there is sufficient interest in ACP, it is often helpful to do a deeper dive into your organization's readiness to implement a program like PREPARE.

Adapted from the PRISM framework, here are some questions that can help you contemplate some of the challenges and opportunities associated with making ACP and the PREPARE materials more broadly available to your patients or clients.

| Organization's Perspective on PREPARE and ACP | |
|--|---|
| | If applicable, what ACP materials are you using now? |
| | If applicable, what messaging do you use for ACP now? Is this working? |
| | How could PREPARE materials be included in your established workflow? Mailings, meetings, group visits, symposium, etc.? |
| | If ACP and PREPARE is implemented, how would you measure success? |
| Patient/Client Characteristics | |
| | Briefly describe the population you serve. |
| | What languages are spoken by the majority of your clients/patients? What percentage of your population speaks Spanish? |
| | Do you have a patient/client advisory committee/champion who could help give advice about ACP? |
| Patient/Client Perspective on PREPARE and ACP | |
| | What barriers to ACP are your clients facing (e.g., health literacy, language barriers, etc.)? |
| | What are some common misunderstandings or beliefs your patients/clients hold about ACP? |
| | Given PREPARE's ability to address literacy, cognition, and language challenges, how could PREPARE materials support your organization? |
| External Environment | |
| | Are there consequences that have happened because ACP is not more widespread? How so? |
| | Are there community resources that can enhance an ACP program? |
| | Are there community champions or leaders that can help reach socially and economically marginalized and medically vulnerable older populations and champion ACP in those communities? |



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CREATE A PLAN

With a clear understanding of the challenges and possibilities in your organization, your next step is to begin planning your ACP/PREPARE effort. Depending on the scope of your plan, it may be helpful establish a task force or work group representing involved staff/units to help with planning and to oversee the implementation of an ACP/PREPARE activity or program. Even better, if there is an existing group that already meets regularly, it can be helpful to encourage this group to take on ACP as one of its priorities.

As always, you want to start with the end goal in mind. Set one or two clear, SMART objectives for this effort. SMART objectives are Specific, Measurable, Attainable, Relevant, and Time-Bounded. Once you know where you are headed, you can develop a clear, concrete set of steps and a plan to get there.

Working with your group, you can identify these steps, secure necessary buy-in and approvals, understand any changes to existing workflows, and identify how you are going to communicate to various stakeholders and program participants to ensure everyone is ready to move ahead and make the plan a success.



This example is for a medical clinic, but can be extrapolated to community organizations

Project Objective

Establish a series of three (3) group medical visits by June 2022 among older Spanish-speaking patients, using the PREPARE for Your Care movies, PREPARE Movie Toolkit for the group facilitator, the PREPARE Movie Question guide for participants, and the easy-to-read PREPARE advances directives.

Patient population

Hispanic/Latino older patients with limited English proficiency

Relevant staff

- Nurses
- Social work staff
- Translators, if needed

Approvals required

- Medical director sign-off



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Materials/resources needed (see reference below for license information)¹

- Access to PREPARE for Your Care online movies in Spanish
- Access to PREPARE Movie Event Toolkit and Question Guide
- PREPARE state-specific, legally valid, easy-to-read advance directives in Spanish

| Task | Deadline | Assigned to | Notes |
|---|----------|-------------|-------|
| Identify possible patients and dates for group medical visits (GMV) | | | |
| Reserve room | | | |
| Train staff to conduct a GMV | | | |
| Download, review, and copy materials | | | |
| Communicate to relevant clinicians about the GMV and answer questions | | | |
| Recruit patients for the GMV | | | |
| Hold the first GMV and assess success and challenges | | | |
| Conduct subsequent sessions and review | | | |
| Decide next steps around ACP – continue GMVs? Other activities? | | | |
| Secure branding license from UCSF/PREPARE, if needed | | | |

¹ PREPARE materials can often be used without a license. Please see the [terms of use](#). Licenses can be obtained from the University of California Regents for branding of the PREPARE materials with your organization’s logos/colors and for research, quality improvement, data reporting, and consulting.



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IMPLEMENT THE PLAN

Now that you have a plan for the work, it's time to work the plan. Of course, this will vary based on what you are trying to accomplish, but there are several things to consider:

- Are PREPARE materials easily accessible to staff and patients/clients/community members? Will you need to acquire a license to brand the materials, conduct quality improvement or research, or to obtain data reporting of PREPARE use?
- Is a brief or small pilot indicated? Trying ACP/PREPARE out with a limited number of patients/clients/community members can help identify unforeseen challenges.
- Are you able to get initial feedback on what worked and didn't work to help drive process improvement?
- Are staff prepared to implement PREPARE? Do they have sufficient information, guidance, or training? Do they know where to go to answer [questions about PREPARE or ACP?](#)
- Are the information/documentation procedures clear and understood?
- Are patients/clients sufficiently aware of ACP and PREPARE? How do you know? How many times have you communicated with them about what is on offer and what to expect?
- Have you connected with your communications staff to help in building awareness about ACP and PREPARE?

At the beginning stages of any new project, communication is crucial. People are busy, and there is always competition for their time and attention. It may feel over the top, but it can help to communicate multiple times to key staff and to patients/clients/community members to ensure everyone is on the same page and to encourage buy-in or participation.



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SUSTAIN THE WORK

Starting the work, of course, is only the beginning. It may be helpful for your task force/working group to continue meeting to assess and improve the work. You will also want to hear from various individuals/staff, particularly those directly responsible for the work, as well as participants to facilitate ongoing learning and sharing and to build momentum.

It may also be helpful to create a dashboard to monitor activity and uptake and to inform any programmatic or implementation pivots that may be required. This dashboard, complemented by first-person testimonials from staff and participants, can be used to demonstrate your impact and build support for the work going forward.

Creating and communicating this case for ACP/PREPARE will be important as the working group/task force considers how to ensure that your initial project or activity can be repeated. Are there ways to integrate ACP/PREPARE into your organization's routine practice? Do you need to find ways to protect time or appropriate needed resources to fund ongoing ACP/PREPARE efforts? Who is responsible for signing off or finding these funds or staff to ensure this important work can continue?

And thinking a bit more broadly, here are some questions, adapted from the PRISM framework to help you think through these and other sustainability issues:

| Future Implementation & Sustainability | |
|--|--|
| | How do you think your organization could partner with other organizations to increase dissemination and implementation of ACP and PREPARE? |
| | Do you have ideas regarding how PREPARE could be implemented and disseminated more broadly in your organization? |
| | Are there resources for future implementation, dissemination, and sustainability of ACP and the use of PREPARE? |



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Each organization has unique assets and challenges when it comes to implementing ACP and PREPARE. Here are three examples of how community-based groups and health organizations have approached this work:

- [Example 1](#): PREPARE Group Movie Event Workshops at a Senior Center
- [Example 2](#): Integrating PREPARE into Routine Care at a Federally Qualified Health Center
- [Example 3](#): Incorporating PREPARE into a Health System Workflow



[Example 1: PREPARE Group Movie Event Workshops at a Senior Center](#)

The Activities Director at a senior center in San Francisco that serves a diverse group of older adults, including a significant percentage of Spanish-speaking people, was looking for ways to improve the senior center's programming around health and well-being. They learned about the importance of advance care planning (ACP) from Twitter during the week of National Healthcare Decisions Day. A web search identified several ACP programs, including PREPARE for Your Care™, which looked interesting because of its easy-to-read materials in several languages and its easy online access.

As the Director had general autonomy around their programming, they checked with their Executive Director and got the go ahead to pilot a workshop on ACP, featuring PREPARE's videos and resources. They downloaded the PREPARE Movie Toolkit and Question Guide, familiarized themselves with the materials, and began planning for a 90-minute workshop.

The Center had a room, a large screen and Internet access, so they focused on finding a good date and time (right after lunch was popular for her programming generally) and doing extensive outreach. They used the helpful marketing suggestions in the PREPARE Movie Toolkit, including information about ACP and PREPARE. They then included information about the workshop in the Center's weekly newsletter, posted flyers around the center based on the template provided in the Toolkit, and spoke individually with several "regulars," who showed up for many of their other health programs.

For the workshop, the Director downloaded and made copies of the PREPARE Movie Event Question Guide and easy-to-read PREPARE advance directives for the state of California for the group participants. Following the Movie Toolkit's instructions, they ran a successful workshop for 12 English-speaking and bilingual people, where the group watched the Step 1 (Choose a Medical Decision Maker) and Step 2 (Decide What Matters Most in Life) Movies. They used the FAQs section of the Toolkit (also in the [FAQ section of the PREPARE website](#)) to answer any questions that people may have had. They also referred people to their medical provider if the questions were too complicated. At the end of the workshop, they used the feedback template included in the Movie Event Toolkit to get feedback from participants. Using that feedback, they planned two more



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workshops to be conducted in Spanish. With this experience under their belt, the Director then began running the PREPARE workshop quarterly, including one session completely in Spanish, to provide a regular “dose” of ACP for the Center’s members.

Licensing: No license required. Because the organization was only sharing the public PREPAREforYourCare.org URL and was using the materials directly from the public PREPARE website and they were not hosting any of the PDFs on their own organizations website or in their own materials or sending the PDFs electronically to others (per the terms of use) a license was not required. They were also not interested in conducting a QI or research study with funding or for publication and did not need organization-branded materials at this time.



Example 2: Integrating PREPARE into Routine Care at a Federally Qualified Health Center

A nurse practitioner responsible for quality improvement at a Federally Qualified Health Center outside of Seattle was looking for ways to integrate ACP into routine care. They heard about PREPARE from a colleague and liked its ease of access and approach. Other colleagues at the center were also interested in finding ways to more routinely incorporate ACP into practice, particularly with patients with serious illness and their Spanish-speaking patients. The NP shared the PREPARE site and materials with these clinicians and together they started to explore different approaches to using these resources. The NP went through the PRISM questions with their colleagues and came up with several ideas including:

- Sending the PREPARE URL link to patients through the patient portal of the clinic’s electronic health record;
- Making copies of PREPARE [Pamphlets](#) and [Advance Directives](#) for patient waiting rooms and exam rooms;
- Providing their clinicians with the [PREPARE Simple ACP Scripts](#) to help start ACP conversations; and
- Training staff to conduct group medical visits with the [PREPARE Movie Event Toolkit](#) and [PREPARE Question Guide](#).

Led by the NP, the group developed a brown bag lunch for staff and volunteers on ACP and the PREPARE program to build more awareness. The NP also discussed the group’s ideas with the clinic’s Medical Director, who gave the NP the go-ahead to place PREPARE’s materials in a few public areas at the clinic and to organize additional sessions to train staff and volunteers about the basics of ACP.



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Over the course of three months, as people in the clinic became more familiar with ACP, a small working group studied the organization's readiness to do this work using the PRISM questions. They identified key people and processes that were involved to ensure that each patient had access to PREPARE materials during routine care and that conversations about patients' wishes and the PREPARE advance directives were documented in the electronic health record. The working group developed a small, internal (i.e., not resulting in an external report or publication) quality improvement project with a subset of patients and used those learnings to improve their approach with a larger group of patients. They learned that patients could engage with the PREPARE materials and their workflow processes were successful. Patients reported that they would like to see some sort of clinic branding or logo on the materials so they would know it was coming from a trusted source.

Licensing: Basic Branding for materials. Now ready to roll this out across the clinic, the team obtained approval from leadership to enter into a Basic Branding license with PREPARE and the University of California Regents to add the Center's branding and logo to the PREPARE Advance Directive and pamphlet as well as provide the Center's contact information on the materials.



Example 3: Incorporating PREPARE into a Health System Workflow

After reviewing recent health media coverage and the broader literature about the benefits of ACP, a physician working as a co-lead for a Population Health Workgroup at a university primary care practice identified ACP as an important quality metric for their Medicare Advantage patients. Increasingly concerned about health equity and access, they knew that many patients who had not engaged in ACP had limited health literacy or spoke a language other than English.

While considering possible approaches, they wanted an ACP program that was both evidence-based and broadly accessible. The physician reviewed different programs and found extensive evidence for PREPARE and its ability to reach a culturally and linguistically diverse patient population.

They then made a brief presentation about ACP and PREPARE to the Executive Director of the Office of Population and Accountable Care and the senior management team using the slides and the one-page summaries provided on the PREPARE website. Impressed with the presentation and the research evidence behind PREPARE, particularly to reach historically marginalized populations, the Executive decided to place ACP as a quality metric priority for the upcoming year for their Medicare and Medicare Advantage patients. They also authorized an ACP working group, to be led by the primary care physician, to assess the system's readiness.



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Using the PRISM questions, the workgroup began to speak individually with a variety of department heads to understand their sense of competing priorities and what was realistic in terms of implementing an ACP initiative. They found great interest in ACP and PREPARE, particularly, its ability to address health equity concerns (an institutional priority) and to make things easier for clinicians as PREPARE primes patients for ACP conversations. However, they also learned that any implementation would have to wait three months until the completion of a big EHR transition.

The workgroup used this time to create easy-to-read messages about ACP using the resources on the PREPARE website. They worked with their EHR team to send ACP messages to older adults through the patient portal and through the mail. They also chose their first primary care pilot site and provided brief training to those clinicians using [the PREPARE Simple Scripts for Clinicians](#) and the [ACP Toolkits](#) to begin to incorporate and bill for ACP discussions and PREPARE into the Medicare Annual Wellness Visit. They also piloted a series of [PREPARE Group Medical Visits](#) using the PREPARE Group Movie Event Toolkit and training materials.

During this initial phase, the workgroup heard from patients and providers that adding the university health systems branding and logos to the PREPARE materials would help to build trust in their ACP programs. The workgroup brought this to the attention of the Population Health Leadership team who agreed to obtain a branding license from PREPARE that enabled the system to use their own branding on the PREPARE materials and to create a custom URL so that patients understood PREPARE as part of the system's regular care. They also agreed that research data reporting license would allow them to monitor uptake and usage of PREPARE materials for quality improvement purposes. Pending results of this initial body of work, the implementation team plans to expand their ACP program to clinicians throughout the system so that all older patients have the opportunity to engage with the PREPARE materials and engage in the ACP process.

Licensing: Premium Plus Branding and Research/Data Reporting License

The implementation team obtained approval from leadership to enter into a [Premium Plus Branding license](#) with PREPARE and the University of California Regents. This allowed them to add the system's branding and logo to the PREPARE Advance Directive and Pamphlet, to have a health system-specific custom URL, customized landing page of the PREPARE website, and branded [PREPARE Advance Directives](#) integrated into the PREPARE online program. They also sought out a separate [Premium Research/Data Reporting license](#) that provides access to a data dashboard that allows the team to track PREPARE usage and to identify how to further improve ACP with more patients.



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PREPARE for Your Care™ provides easy-to-use, evidence-based, culturally and literacy appropriate materials in several languages to help people engage in ACP. The cornerstone of the program includes **videos that model “HOW” to engage in ACP**. PREPARE also provides toolkits and other resources, such as easy-to-read advance directives in several languages and easy-to-use scripts to help clinicians start ACP conversations. These materials can be used by organizations in various ways to meet their unique needs. Please see the [Tools for Providers and Organizations](#) section of the PREPARE for Your Care™ website.

- **Person-Facing ACP Materials**

- [PREPARE for Your Care Online Program](#): The online, secure, interactive ACP program that provides a step-by-step guide, video stories, and values-based questions.
 - [PREPARE Quick Start Guide](#): Handout includes pictures and step-by-step instructions to help users get into and start using the online program.
 - [PREPARE Pamphlets](#): Available in English, Spanish, and Chinese.
- [PREPARE Easy-to-Read Advance Directives](#): These forms are legally valid and available for all U.S. states in English and Spanish and a growing number in Chinese and other languages.
- [PREPARE Summary of My Wishes](#): This form includes a summary of all the user’s answers to the online PREPARE values questions for those not ready to complete an advance directive.
- [PREPARE Covid-19 Tip Sheet](#): Helps individuals prepare for a hospital visit and ACP.

- **Materials for Providers and Organizations**

- [How to Use PREPARE Tools for Providers & Organizations](#): A brief summary of the PREPARE tools and how to use them.
- [Simple ACP Scripts for Everyone](#) (clinicians and non-clinicians): This two-page document provides easy to use scripts (i.e., words to say) to start ACP conversations and to introduce PREPARE materials.
- [PREPARE ACP Toolkit](#): This toolkit provides more in-depth instructions and scripts for starting ACP conversations and discussing the PREPARE tools.
- [PREPARE Toolkit for Group Movie Events](#): A step-by-step guide with all materials to put on group events using the PREPARE Question Guide and PREPARE Movies.
- [4-item ACP Engagement Survey](#): Validated, easy-to-use, and used to measure the effect of ACP interventions.
- [License Packages](#)
 - Research & Quality Improvement License Packages
 - Co-branding Advance Directive License Packages



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