

Working Together to Improve Advance Care Planning in Healthcare & Community Settings

A Guide From:



Respecting Choices[®]
PERSON-CENTERED CARE

PREPARE[™]
for your care



IMPROVING ADVANCE CARE PLANNING IN HEALTHCARE AND COMMUNITY SETTINGS

Respecting Choices® and PREPARE for Your Care™ are two of the nation's leading, evidenced-based advance care planning (ACP) programs.



ACP is a process that leads to thoughtful conversations about people's wishes, person-centered decision-making, accessible documentation, care aligned with people's preferences, and decreased caregiver distress. Yet, ACP can be challenging to put into practice.

- **Respecting Choices** and **PREPARE for Your Care**, two of the nation's leading ACP programs, have created this document to best leverage a combination of their evidenced-based products and services to support healthcare and community innovators seeking person-centered, customized, and cost-effective solutions to improve their ACP efforts.

Respecting Choices and PREPARE are the only ACP organizations that have been approved as [Evidence-Based Programs through the Title III-D Program of the Older Americans Act](#).

- **As leaders in the field, we can help you take on this important work by offering:**
 - Expert consultation in system transformation
 - Clinician education
 - Person-centered, culturally-appropriate education and materials

This Guide Will Help You:

- Understand what **Respecting Choices** and **PREPARE for Your Care** can offer.
- Learn how these programs can be used together for maximal, synergistic results.
- Discover how these programs address diversity, equity, inclusion, and health disparities.
- See the benefits of advance care planning to individuals, families, and healthcare organizations.
- Plan your next steps toward increasing advance care planning by working with these programs.

Please contact us to learn how Respecting Choices and PREPARE for Your Care can help improve the quality of your ACP programs.

info@respectingchoices.org
info@prepareforyourcare.org

TABLE OF CONTENTS

Page	Contents
4	Overview
6	Information about Respecting Choices and PREPARE for Your Care
9	How Respecting Choices and PREPARE Can Work Together
10	Research Demonstrates the Efficacy of These Programs
12	Addressing Diversity, Equity, Inclusion, and Health Disparities
14	Services and Products Respecting Choices and PREPARE Offer
16	Contract, Purchase, or License with Respecting Choices and/or PREPARE
18	Appendix: Respecting Choices and PREPARE Resources and Materials

OVERVIEW

The **Respecting Choices** and **PREPARE for Your Care** collaboration offers a combination of expert consultation in system transformation, clinician education, and person-centered education and materials to successfully increase advance care planning.



Respecting Choices uses consultation methods based in systems-theory to guide organizations and communities in implementing sustainable ACP and shared decision-making programs. It also provides ACP facilitator training, evidenced-based person-centered materials, and consultation for leadership engagement, redesign of workflows and electronic health records, and development of an ACP quality improvement program.

How Respecting Choices Can Support You

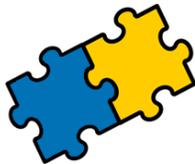
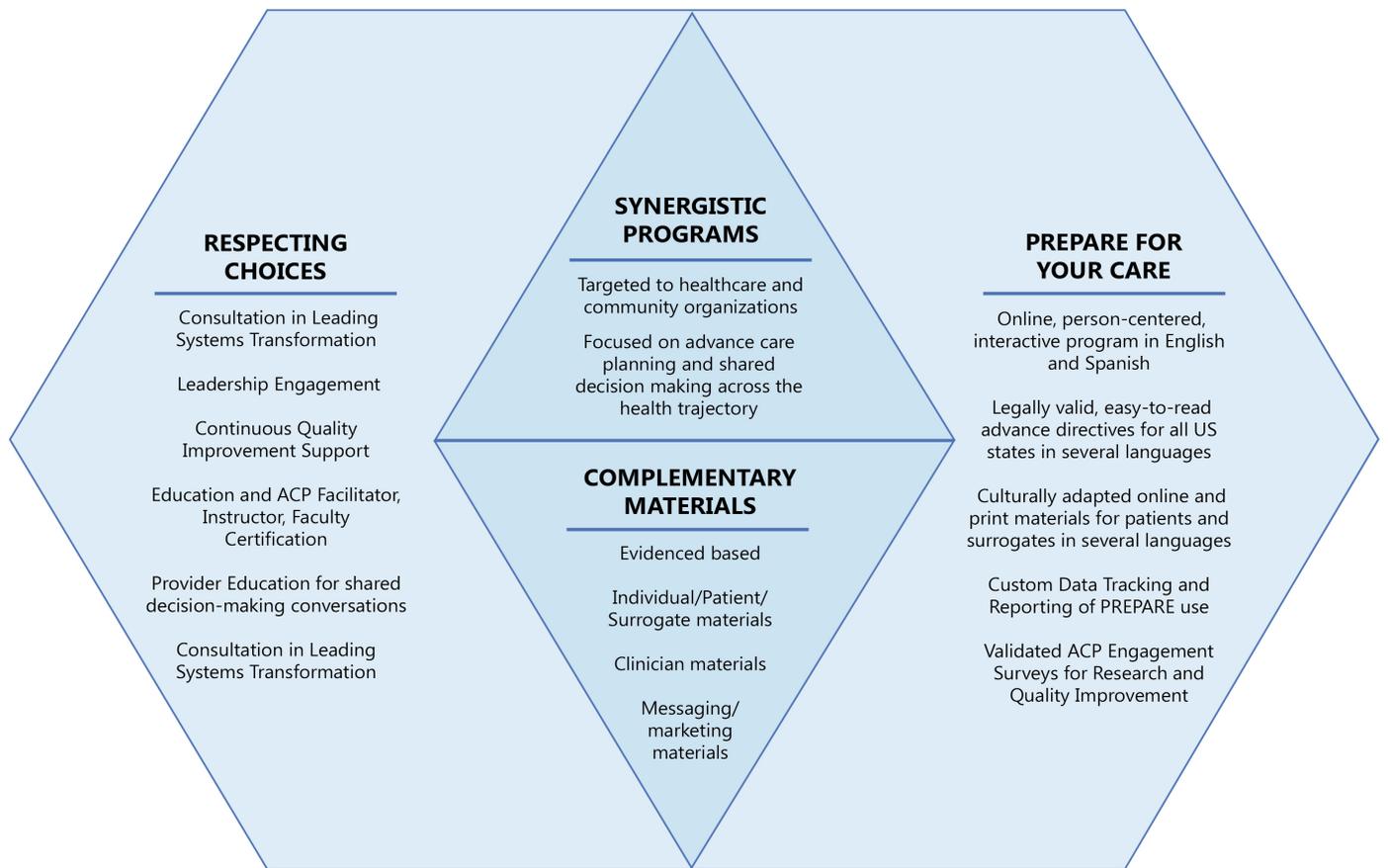
 Consulting Services	 Education and Certification	 Products and Materials
<ul style="list-style-type: none">• Program Implementation• Program Assessments• Leadership & Stakeholder Engagement	<ul style="list-style-type: none">• National Certification Courses• Online Courses• Instructor Certification• Faculty Certification via Fellowship Program	<ul style="list-style-type: none">• Education & Engagement Materials• Fact Sheets• Certified Decision Aids• Books and Manuals



PREPARE for Your Care is a person centered, evidenced-based online program in English and Spanish that helps people from diverse backgrounds prepare for medical decision making. It includes video stories to help people learn how to discuss their wishes with family, friends, and medical providers. The program offers a range of materials, including easy-to-read, legally valid, values-based advance directives for all US states in English, Spanish, and a growing number in other languages, such as Chinese.

How PREPARE™ for Your Care Can Support You

 Person-Centered Materials	 Clinician Materials	 Consulting Services
<ul style="list-style-type: none">• Easy-to-use, interactive, website in English and Spanish• Video stories that model ACP behavior• Easy-to-read, legally valid advance directives for all US states in several languages	<ul style="list-style-type: none">• Toolkits for Group visits / Group events• Simple Scripts and Toolkits to start ACP conversations	<ul style="list-style-type: none">• Program implementation & assessment



Examples: The programs can be used separately or together for maximal, synergistic benefit.

Priming the ACP Process

- Individuals are offered PREPARE’s online program with video stories that enable them to discuss ACP with family and friends, complete PREPARE’s easy-to-read advance directives on their own, and prepare them to speak with their medical providers.
- Respecting Choices provides certified training and consultation to organizations. Their staff learns how to facilitate ACP conversations and to include ACP in their existing workflows.

Leads to Successful ACP

- People are prepared for communication and medical decision making, and if appropriate have completed easy-to-read, legally valid advance directives in their preferred language.
- People have meaningful conversations with their family, friends, and medical providers.
- ACP is integrated into existing workflows and is appropriately documented and accessible.

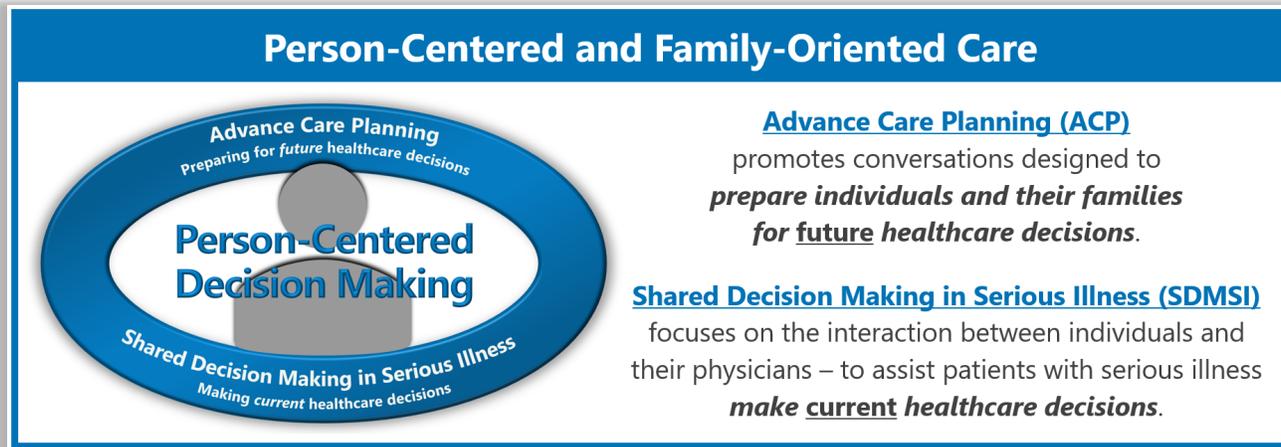
INFORMATION ABOUT RESPECTING CHOICES AND PREPARE FOR YOUR CARE



Respecting Choices is a well-established, nonprofit, 501(c)3 organization committed to guiding organizations and communities worldwide to effectively implement and sustain evidence-based systems that support advance care planning (ACP) and shared decision making in serious illness as standards of care for all people to ensure that individual's goals, beliefs, preferences, and decisions for healthcare are ***known and honored***. Respecting Choices knows that advance care planning conversations are not a "one size fits all" intervention and has developed conversations to meet the needs of any individual, whether a healthy young adult, a patient navigating the complexities of progressive illness, or an individual facing end-of-life decisions, meeting them where they are currently in their health situation.

Over the last 25 years, Respecting Choices programs have been used in over 500 organizations and communities across the U.S. and other countries, providing a robust foundation of practical experience. In addition, Respecting Choices has been a studied intervention in [33 research publications](#). Together, the practical experience and peer-reviewed, published research have demonstrated that the Respecting Choices programs favorably impact all domains of the Quadruple Aim.

Respecting Choices has two programs that work together to embed person-centered decision making as a standard of care: ***Advance Care Planning*** and ***Shared Decision Making in Serious Illness***.



Each of these programs are designed to integrate with the other, creating an interprofessional approach that supports individuals through their decision-making process by using consistent language, strategies, and processes across sites of care and over time. Implementation of the Respecting Choices programs ensures that patients receive proactive, timely support to discern what matters most to them as a basis to establish their preferences and decisions, as appropriate to their stage of health, resulting in improved outcomes.

Each program implementation addresses elements beyond education, to include focusing on systems to support the process, such as patient engagement and education materials, workflows, documentation systems, metrics, and sustainability plans.



PREPARE for Your Care is a person-centered, evidenced-based, easy-to-use, online,

HIPAA-compliant, advance care planning (ACP) program in English and Spanish. It was developed by [researchers at the University of California, San Francisco](#), and was launched in 2013. PREPARE is based on behavior change theory and uses [video stories](#) to help people prepare for communication and decision making. It can be used by the public and by health systems, medical providers, and community-based organizations.



The Goals of PREPARE for Your Care:

1. Provide easy-to-use ACP materials to culturally diverse communities and reduce health disparities.
2. Prepare people and their surrogate decision makers for ACP communication and decision making.
3. Empower people to discuss their wishes with family, friends, and medical providers, and if appropriate, to document their wishes in easy-to-read advance directives.
4. Provide easy-to-use, ACP resources for community-based organizations and clinicians.

The PREPARE program also provides easy-to read advance directives in English and Spanish for every state in the US, with a growing number in Chinese and other languages. The directives are reviewed frequently by a legal team to ensure they are valid in all states. The PREPARE advance directives are unique in that they are written at a 5th-grade reading level and focus on peoples' values and quality of life. They also provide space for people to explain their choices. This type of information is invaluable for honoring peoples' wishes at the bedside.

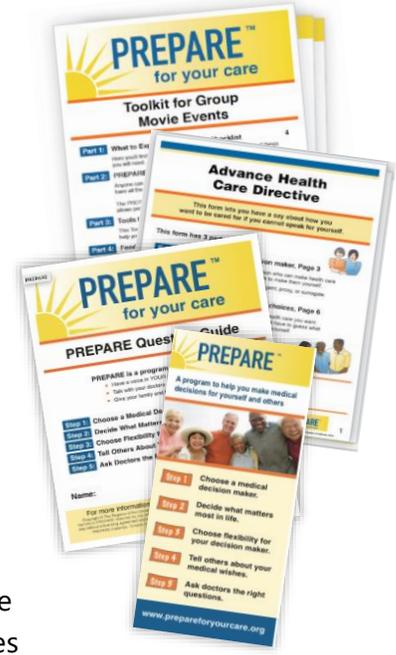
Rather than only focusing on checkbox, end-of-life preferences, the PREPARE online program and advance directives helps people identify what is important for their quality of life. It also prepares people, through video stories, to communicate with others and make medical decisions based on their values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

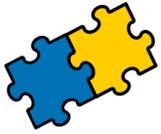


In addition, the program provides easy-to-use training materials for clinicians to start the ACP conversation, and easy-to-read ACP materials they can provide to their patients and clients in several languages.

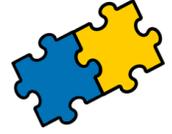
The PREPARE for Your Care online program and advance directives are evidenced-based with [substantial research](#) demonstrating their efficacy and effectiveness, including in randomized controlled trials among English and Spanish-speaking patients. In addition, PREPARE and the easy-to-read advance directives were designed for use outside of the clinical encounter to decrease clinician time. Our research has shown that the PREPARE program decreases health disparities in ACP.

PREPARE for Your Care can prime your patients/clients to be ready to speak to medical providers and Respecting Choices Facilitators. This decreases clinician time and helps to improve the quality of the ACP discussions. This synergy supports organizations whose goal is to increase the prevalence of ACP; offering choices for individuals, Respecting Choices certified Facilitators outreach to those requesting a conversation is increased. Integrating an easy-to-use online ACP experience in English and Spanish as preparation for a conversation reduces the time for the conversation and enables the organization to better meet the needs of the diverse individuals they serve.





HOW RESPECTING CHOICES AND PREPARE CAN WORK TOGETHER



Respecting Choices and PREPARE for Your Care are **SYNERGISTIC**. Together, they can increase access to ACP and meet people where they are in their health journey ([Figure](#), Page 5).

- Some people may prefer to start with the PREPARE online ACP program with video stories.
- Some people may be ready and prefer to complete the PREPARE easy-to-read advance directives on their own.
- Some people may prefer to start with a 1:1 ACP facilitated conversation.
- Some people may prefer both—an online program/advance directive review followed by a conversation.

Respecting Choices and PREPARE both have a suite of materials (see [Appendix](#)) that will meet your needs in combination with the online ACP experience and facilitated conversations.

PREPARE for Your Care in English and Spanish can prime your patients/clients to be ready to speak to Respecting Choices Facilitators and other medical providers. This decreases clinicians' time, helps to improve the quality of the ACP discussions, and enables organizations to better meet the needs of individuals from diverse cultural backgrounds. These discussions create a strong building block for shared medical decision-making.

[Examples: How health systems and organizations may use our tools to engage people in ACP:](#)

- **Conversations**
 - People use the online PREPARE program and are empowered to discuss with their family, friends based on the video stories and instructions provided.
 - People use the online PREPARE program as pre-work to “prime” them before a meeting with a certified Respecting Choices Facilitator or other medical provider.
 - Medical providers and community leaders use the Respecting Choices guides and the PREPARE Simple Scripts to talk to patients/clients and/or their designated decision-maker about ACP.
 - Medical providers and community leaders use the PREPARE videos and Movie Event Toolkits to conduct community group events or group medical visits in person or virtually.
 - Health systems use the EMR and the patient portal to send messaging about ACP, links to the PREPARE resources, and to offer Respecting Choices facilitation.
- **Documentation**
 - Health systems and organizations can download easy-to-read PREPARE state-specific, legally valid, advance directives for all US states in English and Spanish, and growing number of other languages, such as Chinese.
 - People can complete the advance directive with help from the PREPARE program.
 - People may start to complete an advance directive on the PREPARE program and then follow up with a facilitated Respecting Choices conversation. Facilitators may then assist with disseminating the form to the healthcare team.

RESEARCH DEMONSTRATES THE EFFICACY OF THESE PROGRAMS



Respecting Choices' demonstrated *research and practice-based outcomes* include the following:

- **Benefits to Individuals/Patients**
 - Individualized, person-centered planning discussions facilitated in a consistent and standardized manner across all care settings
 - Provision of care and treatment that is consistent with patient goals and values, and avoidance of unwanted care
 - High patient and family satisfaction with ACP conversations
 - Increased congruence in patient and surrogate decisions
 - Increased prevalence of planning in racially, ethnically, and culturally diverse communities
 - Patient goals of care clarified by exploring the concept of “living well” (i.e., experiences most important to give life meaning)
 - ACP plans that are clear and available to healthcare providers
 - Specific and easy-to-understand plans integrated into medical decision making
 - Patients’ goals and decisions translated into written plans to guide clinical decision making
 - Timely and appropriate referrals for other needed services (care coordination) promoted
- **Benefits to Families/Loved Ones**
 - Decreased decisional conflict and regret
 - Increased surrogate understanding of patient’s goals of care
 - Positive impact on family members through reduced stress, anxiety, and depression in surviving relatives
- **Benefits to Healthcare Organizations**
 - More equitable access to care
 - High satisfaction of patients with hospital care in general
 - Reduced Moral distress of healthcare providers and clinicians working with patients and surrogates on end-of-life decision making
 - Clinician competency and comfort level with conversations improved by developing and enhancing communication and facilitation skills
 - Time spent by physician and healthcare team on crisis end-of-life decision making (e.g., family meetings, conflict resolution) shifted to time spent on early and effective planning conversations
 - Improved efficiency of care, including earlier hospice referrals and use at end of life
 - Increased hospital CPR success (alive at discharge), decreasing CPR prevalence with associated poor outcomes
 - Reduced in-hospital deaths
 - Trend of reduced cost of care
 - Delivery of a consistent patient/clinician experience standardized by a systems approach

For more information, visit [Respecting Choices Research and Reports](#).



Demonstrated impact of PREPARE for Your Care:

The PREPARE team initially completed a [randomized trial of the PREPARE easy-to-read advance directives](#) among 205 chronically ill, English and Spanish-speaking older adults at a public hospital. This trial found the PREPARE advance directives were preferred over a standard advance directive and resulted in greater 6-month completion rates.

Next, the PREPARE team completed two randomized controlled trials among >1400 English and Spanish-speaking primary care patients. Patients were provided the PREPARE website plus the PREPARE easy-to-read advanced directives versus the directive alone and asked to review them on their own, outside of the clinical setting.



- In a [VA trial](#) of 414 participants (mean age 71 ± 8 years, 43% nonwhite race/ethnicity), PREPARE arm participants had greater overall ACP documentation (35% vs 25%, $p = 0.04$) and greater self-reported ACP engagement vs. the AD alone ($p < 0.001$).
- In a [large follow-up trial](#) conducted in four safety-net, primary-care clinics in San Francisco, including 541 English-speaking and 445 Spanish-speaking primary care patients, PREPARE resulted in a higher rate of ACP documentation (43% vs 32%; $p < 0.001$) and higher self-reported ACP engagement scores (98% vs 89.5%; $p < 0.001$). These studies were patient-facing, meaning that these interventions required no additional clinician or system-level interventions.
- In addition, through audio-recordings of primary care visits after reviewing the interventions, we found that the PREPARE for Your Care online program and video stories [empowered older adults to speak up about ACP](#) 41% more than patients who just reviewed the advance directive. The increased patient empowerment resulted in increased ACP documentation in the medical record.

This body of randomized trial and other research demonstrates that the PREPARE program:

- a) successfully engages patients in ACP – even older patients with limited health literacy (20% in the VA trial and nearly 40% in the SF safety net).
- b) engages patients in pre-visit ACP, which has a direct impact on primary care visit interactions, advance care planning documentation, and patient involvement in their own care.

For more information, visit [PREPARE For Your Care Research](#).

ADDRESSING DIVERSITY, EQUITY, INCLUSION, AND HEALTH DISPARITIES



Respecting Choices

Since inception, Respecting Choices has been providing practice-based evidence on what works in the real world, demonstrated across diverse populations, nationally and internationally. A key strategy is Respecting Choices' conversation guides. These guides are person-centered, beginning with an assessment of the individuals' fears followed by the exploration of personal, cultural, and/or spiritual beliefs. The conversation guide is a framework. There is flexibility within this framework for the ACP Facilitator guiding the conversation to adapt the conversation to meet the needs of every unique individual.

This person-centered and family-oriented approach is an essential element in designing an ACP approach that is individualized, respects these variables, and is translatable and transferable to meet the person where they are and honor the unique needs that are identified. Importantly, our findings show that beginning the planning process is never "too early" to help people talk about what is important to them, and this exploration of how their personal, cultural, and spiritual beliefs may impact ACP preferences and decisions. The Respecting Choices model overcomes previously identified obstacles to ACP planning and is attentive to and ensures increased understanding of the person's healthcare goals, preferences, and values, even as the individual may change their mind over time.



PREPARE for Your Care and Advance Care Planning for All

Our team's mission is to continue to fight against inequities in health care access and ACP. The PREPARE team has gone to great lengths to include diverse patients, caregivers, and communities in the design, development, [testing and implementation of our PREPARE materials](#). All of PREPARE's materials go through a very rigorous user-centered design process where we partner with culturally and ethnically diverse communities throughout the entire design process.

The PREPARE team co-created the online program, the easy-to-read advance directives for all US states in English and Spanish, and the California advance directives in 11 languages with individuals from diverse cultural and family backgrounds. The PREPARE online video stories are also based on real-life stories from individuals from diverse family backgrounds who participated in our focus groups and in-depth interviews.

The PREPARE team has [published the rigorous methods](#) used to co-develop the online and written materials with and for culturally diverse communities:

- To overcome health literacy barriers, PREPARE materials are targeted to the 5th grade reading level.
- To overcome language barriers, PREPARE materials are in several languages.
- To overcome visual impairment and health literacy barriers, the PREPARE online program provides a “speak aloud” function if it is needed.
- To overcome hearing impairment, PREPARE includes closed captioning for all video content.
- To overcome limited computer literacy, particularly among the elderly, the PREPARE team developed the program in partnership with older adults and obtained outside evaluation and user testing to ensure it was easy to use by older adults.

Furthermore, the COVID-19 pandemic has hit communities of color the hardest. The PREPARE team has created easy to read materials in English and Spanish to help communities consider their [options for medical care and plan for a hospital visit](#). PREPARE also has [easy-to-read scripts](#) that any type of clinician, lay health worker, or organization can use to start an ACP conversation with their patients or clients.

The PREPARE team continues to elicit feedback from end users, research participants, and our community partners to ensure all materials are up to date and continue to meet the needs of our end users.



SERVICES AND PRODUCTS

RESPECTING CHOICES AND PREPARE OFFER

Both the **Respecting Choices** and **PREPARE for Your Care** services and programs have been adopted by large multi-state health systems to small critical access hospitals, as well as with community-based organizations (e.g., Area Agencies on Aging, Faith Communities, large and small community conveners).



Respecting Choices' experience demonstrates the value and effectiveness (and importance) of community-clinical implementation, elevating a holistic approach to address individuals' mental, spiritual, social, and emotional priorities when making healthcare decisions. Our philosophy of *Freedom within a Framework* encourages adaptation of the Respecting Choices framework, developed with 25 years of practice and research-based evidence, to meet your individualized needs.

■ **Consulting Services**

Respecting Choices offers implementation packages that address all populations and stages of health, resulting in an effective system that will ensure all individuals' preferences and decisions are known and honored.

- Program Implementation
- Program Assessments
- Leadership and Stakeholder Engagement

■ **Education and Certification**

Respecting Choices offers a range of flexible educational opportunities including certification courses, depending on the goals of your program, organization, or community.

- National Design and Implementation Courses
- National Certification Courses – Facilitator and Instructor
- Online Courses
- Faculty Fellowship Certification Program for Long-Term Sustainability

■ **Products and Materials**

From basic information about ACP to pieces focused on treatment options, you can trust the quality and content in our materials for individuals, healthcare agents, care team members, and others. Explore our comprehensive selection of engagement and education materials, such as ACP Planning Guides, Role of the Healthcare Agent Cards, Fact Sheets, and certified Decision Aids (see Appendix). Co-branding and customization of these materials are available through a subscription agreement.

For more information, see [Respecting Choices Program Support and Services](#) and www.RespectingChoices.org.



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.

■ Patient-Facing ACP Materials

- [PREPARE for Your Care Online Program](#): The online, HIPAA compliant, interactive ACP program that provides a step-by-step guide, video stories, and values-based questions.
 - [PREPARE Quick Start Guide](#): This 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 US 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

- [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. Events use the PREPARE Question Guide and PREPARE Movie.
- [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

■ Consultation

- How to implement PREPARE in your organization
- How to use validated surveys and other metrics to measure the success of your program

CONTRACT, PURCHASE, OR LICENSE WITH RESPECTING CHOICES AND/OR PREPARE



Respecting Choices

Education and Engagement Materials. From basic information about ACP to pieces focused on treatment options, you can trust the quality and content in our evidence-based materials for individuals, healthcare agents, and others. Explore our comprehensive selection of engagement and education materials, such as ACP Planning Guides, Role of the Healthcare Agent Cards, and Fact Sheets. Purchase options include:

- **Buy pre-printed packs of materials** in the Respecting Choices [Online Store](#). Easy online ordering allows you to select the items and quantities you need.
- **Customize/Co-Branding of Materials.** A la carte and entire library of material licensing options available. Materials may be co-branded, and most may be customized. You may print or distribute electronically.
 - *Making Choices® Materials.* (i) permit Licensee to translate into another language at its own expense, (ii) place of Licensee’s name and logo prominently on the Materials (“Co-brand”), or (iii) other modifications requested by Licensee and approved by Respecting Choices. Licensee assigns to Respecting Choices the copyright in all modifications it makes to the Materials.
 - *Decision Aid Materials.* Co-brand with placement of Licensee’s name and logo prominently on the Materials.
 - *Review of Customization and Digital Access.* Respecting Choices will make the modified version of the Materials available for Licensee’s review. Once approved by Licensee, Respecting Choices will make the Materials available in digital format for Licensee to download and use pursuant to the license restrictions stated below.
 - *Licensee Name and Logo.* Licensee grants Respecting Choices a limited license to use Licensee’s name and logo solely to place on the Materials. All goodwill related to the use of the Licensee’s name or logo on the Materials accrues to the benefit of Licensee.
- **Grant of License.** Respecting Choices grants Licensee a limited term, non-exclusive, non-transferable license to the Materials designated on Exhibit A:
 - *Decision Aid Materials.* To reproduce and distribute either in hard-copy form to patients receiving health care from providers/clinicians employed by or under contract with Licensee. There is no limit on the number of copies Licensee may make or distribute so long as such use complies with the other terms and conditions of this Agreement. Licensee may not display or make available the Decision Aid Materials on Licensee’s Website.
 - *Making Choices® Materials.* (i) To reproduce and distribute in hard-copy form to patients receiving health care from providers employed by or under contract with Licensee. There is no limit on the number of copies Licensee may make or distribute so long as such use complies with the other terms and conditions of this Agreement, and (ii) to display as a

locked pdf (unable to copy, distribute, modify) on Licensee's website, provided a link to Respecting Choices' website is adjacent to such display.

- Licensee may not alter or remove any the copyright notices or proprietary legends on any Materials, i.e., © Copyright 2008-2020. GLMF, Inc. All rights reserved.

Respecting Choices Prime. Prime provides access to ongoing, program-specific support for your organization such as access to national Respecting Choices Instructor and/or Faculty meetings and networking. Prime also offers exclusive pricing on services and products purchased most often by Respecting Choices customers.



PREPARE for Your Care

Copyright © The Regents of the University of California, 2013. All rights reserved.

Licensing Opportunities for Researchers. PREPARE can be licensed for use by researchers and healthcare or community organizations to conduct research projects.

Licensing Opportunities for Health Systems and Other Organizations

- **Quality Improvement:** PREPARE can be licensed by organizations to conduct quality improvement projects. For example, organizations may want to measure advance care planning engagement by patients, members, employees, or track PREPARE usage.
- **Branding:** The PREPARE team works with organizations to brand our materials, such as adding logos and health system/organization information.

It is OK to provide the "[PREPAREforYourCare.org](https://www.prepareforyourcare.org)" URL in written or web-based materials. Licensing is required from the UC Regents to include any PREPARE PDFs or any PREPARE content or materials on other websites or within other materials. Derivative works are not allowed. Licensing is also required for the use of any PREPARE content, materials, or PDFs in quality improvement and/or research projects, as well as for white labeling (branding) or data reporting. For more information, please see the [PREPARE Terms of Use](#) and [Licensing Options](#).

Please:

- Use the "[PREPAREforYourCare.org](https://www.prepareforyourcare.org)" URL for online/print materials.
 - The "[How To Use PREPARE Tools For Providers and Organizations](#)" toolkit has standardized descriptions.
- Forward URL only instead of PDFs to colleagues/patients/clients.
- Print materials from the PREPARE website.

Please contact us to learn how Respecting Choices and PREPARE for Your Care can help improve the quality of your ACP programs.

info@respectingchoices.org
info@prepareforyourcare.org

APPENDIX:

RESOURCES AND MATERIALS



Respecting Choices Resources

1. ACP Information Card
2. Selection of an Agent
3. Making Choices Information Booklet
4. Making Choices Planning Guide
5. CPR Fact Sheet
6. Breathing Support Fact Sheet
7. Tube Feeding Support Fact Sheet
8. Certified Decision Aid on CPR
9. Certified Decision Aid Help with Breathing
10. Certified Decision Aid Long-term Tube Feeding
11. Interdisciplinary Team Scripts for motivation to participate in ACP
12. Interdisciplinary Team Scripts Introduction to ACP guide
13. First Steps ACP Facilitator Conversation Guide: Meeting with Individual (and agent if present) (in Spanish and English)
14. First Steps ACP Facilitator Conversation Guide: Adults with Chronic Illness (and agent if present) (in Spanish and English)
15. Next Steps ACP Conversation Guide: Meeting with individuals with Decisional Capacity (and agent if present)
16. Next Steps ACP Conversation Guide: Meeting with agent or designated decision-maker for individuals without decisional capacity
17. Advanced Steps ACP Conversation Guide: Meeting with individuals with decisional capacity (and agent, if present)
18. Advanced Steps ACP Conversation Guide: Meeting with agent or designated decision-maker for individuals without decisional capacity
19. ROI for Implementation, Key Findings, Measured outcomes
20. Key Findings
21. Designing Your ACP System Infrastructure (RC0060)
22. Respecting Choices Program Support and Services and Outcomes"
23. About Us Brochure
24. RC Professional Consultation Services
25. How Respecting Choices is Unique
26. Designing Your ACP System Infrastructure: The Medical Record System
27. Documentation template for First Steps conversations
28. Documentation template for Next Steps conversations
29. Documentation template for Advanced Steps conversations
30. Sample workflow for review of ACP documents
31. Sample workflow for ACP Storage
32. Educational tip sheet for Individuals on storage and next steps
33. Proactive Care Planning for COVID-19
34. Proactive Care Planning with HC Agent for COVID-19

35. Medical Priorities and Treatment Options
36. Scheduling Proactive Care Planning for COVID-19
37. Scheduling HC Agents to Proactive Care Planning for COVID-19
38. Recorded Webinar: How to have a proactive care planning conversation
39. Proactive Care Planning for COVID-19 for Individuals
40. Proactive Care Planning for COVID-19 for Healthcare Agents
41. Respecting Choices Overview for Community Based Organizations webinar
42. Respecting Choices overview for Healthcare webinar
43. Respecting Choices Overview for Palliative Care and Hospice webinar
44. Respecting Choices Highlights for Executives



PREPARE Resources

1. [PREPARE Online Program](#): The online, HIPAA compliant, interactive ACP program that provides a step-by-step guide, video stories, and values-based questions.
2. [PREPARE Quick Start Guide](#): This handout includes pictures and instructions to help users get into and start using the online program.
3. [PREPARE Easy-to-Read Advance Directives](#): These forms are legally valid and available for all 50 states in English and Spanish. In several states the forms are available in Chinese and in California they are available in 10 other languages. The forms can be downloaded and printed. The PREPARE online program questions can also be automatically added to the form for most states. PREPARE can also guide users through completing the form.
4. [PREPARE Summary of My Wishes](#): This form includes a summary of all of the user's answers to the online PREPARE values questions and can be found in the menu. This can be helpful for people who are not ready to complete an advance directive.
5. [PREPARE Pamphlets](#): in English, Spanish, and Chinese that describe PREPARE and ACP.
6. [Covid-19 Tip Sheet](#): that helps individuals prepare for a hospital visit and ACP
7. [Easy-to-use ACP Scripts](#): Providers and community organizations can use to introduce ACP and the PREPARE materials.
8. [PREPARE ACP Toolkit](#): Provides more in-depth instructions and scripts for starting ACP conversations and discussing the PREPARE tools.
9. [PREPARE Movie Event Toolkit](#) with accompanying:
 - a. PREPARE Movies of each step of the website
 - b. Movie Event Question Guide for participants
 - c. A video demonstrating how to put on a movie event either in person or virtually.
10. [4-item ACP Engagement Survey](#): The survey is validated, easy-to-use, and can be used to measure the effect of ACP interventions.
11. [Research & Quality Improvement License Packages](#): A range of packages that may include custom URL and landing pages, aggregate usage data reporting, and PREPARE team support.
12. [Co-branding Advance Directive License Packages](#): A range of packages that may include co-branded advance directives and materials, custom URL and landing pages, and custom AD Step online advance directive.

Please contact us to learn how Respecting Choices and PREPARE for Your Care can help improve the quality of your ACP programs.

info@respectingchoices.org
info@prepareforyourcare.org