PREPARE™
for your care

Guide for Using
PREPARE for Your Care

For Community &
Healthcare Organizations
Interested in
Advance Care Planning

Developed by
PREPARE™
for your care

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PREPARE™ for your care

PREPARE for Your Care™ (PREPARE) is an online resource that helps people begin the important process of planning for medical decision-making. Using video stories, PREPARE helps people explore their personal wishes and learn how to discuss them with family, friends, and medical providers.

Why PREPARE?

Evidence-Based. PREPARE's advance care planning (ACP) programs are based on over two decades of research. In randomized trials, they have proven to empower patients and caregivers, decrease health disparities in ACP, prime patients for clinical visits, and help people get the medical care that is right for them.

National. PREPARE includes advance directives for US states and Washington, D.C.

Multilingual. PREPARE advance directives are available in English and Spanish. They are also available in Arabic, Armenian, Chinese, Farsi, Hmong, Khmer, Korean, Russian, Somali, Tagalog, and Vietnamese for some states.

Accessible. PREPARE is designed to address limited health and digital literacy and visual, hearing, and cognitive impairment.

Legally Compliant. PREPARE advance directives are reviewed yearly by UC Law San Francisco (formally UC Hastings) to ensure compliance with state laws and regulations.

What People Are Saying

"PREPARE is the gold standard of ACP."
— *Susan Edgman-Levitan*
Executive Director of Primary Care Innovations
Massachusetts General Hospital

"After seeing examples on the website,
deciding on my own wishes is a lot easier for me now."
— *Patient, San Francisco General Hospital*

"These resources [through the PREPARE for THEIR Care
program] are a lifesaver, no matter what stage of medical planning you are in."
— *Caregiver*

Partner With Us

PREPARE is copyrighted through the Regents of the University of California. Some uses of PREPARE require a license, and some do not. See our licensing options.

Standard PREPARE License: Co-brand and integrate a subset of our ACP materials into your workflow and technology platforms.
Powered by PREPARE License: Customize, white label, and integrate a complete suite of our ACP materials into your workflow and technology platforms.
Research and Quality Improvement Licenses: Use printed materials and the "PREPAREforYourCare.org" URL in research or quality improvement projects.

WHAT IS PREPARE FOR YOUR CARE?

PREPARE for Your Care™ (PREPARE) is a person-centered, easy-to-use, online, secure ACP program in English and Spanish that uses video stories to help people prepare for medical 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 US states and Washington, D.C. (with a growing number of advance directives available in Chinese and other languages). These advance directives are unique in that they focus on people's 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 help 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 evidence-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, and 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 print state-specific advance directives. An individual may begin completing one with help from the PREPARE for Your Care™ website. Based on the video instructions provided, they may then be empowered to discuss with their family, friends, and clinicians.
- Use a variety of strategies to fit the individuals' desired engagement with ACP, including:
    - o Provide written materials;
    - o Send messaging about ACP and links to PREPARE resources through the patient portal; and
    - o 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.

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 your organization's needs.

- **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 ACP. This can be done in informal conversations or over e-mail and can probe for what they know about ACP and various tools and resources to support it, 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.

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?

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

In your presentation, you will want to explain the importance of ACP in delivering high-quality, person-centered care and 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 exploring ACP and PREPARE; make additional presentations, if needed; and conduct a more thorough readiness assessment.

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 to establish a task force or work group representing involved staff/units to help plan and 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 will communicate to various stakeholders and program participants to ensure everyone is ready to move ahead and make the plan a success.

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

Project Objective
Establish a series of three group medical visits by June 2026 among older Spanish-speaking patients, using the PREPARE for Your Care movies, PREPARE Movie Toolkit for the 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

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			
Download, review, and copy materials			
Train staff to conduct a GMV			
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			

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[1] PREPARE is copyrighted through the Regents of the University of California. Some uses of PREPARE require a license, and some do not. See the front cover of this document and our licensing options for more details.

IMPLEMENT THE PLAN

Now that you have a plan for the work, it's time to work on 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 customize the materials and integrate them into your technology platforms, which requires a license?
    - Will you use the materials in research, quality improvement initiatives, or for data reporting purposes, which requires a license?

- 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.

- Can you 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 about them? How often have you communicated with your patients/clients about what is on offer and what to expect?

- Have you connected with your communications staff to help build 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 patients/clients to ensure everyone is on the same page and encourage buy-in or participation.

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 from participants, to facilitate ongoing learning and sharing and 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 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?

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 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

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Example 1: PREPARE Group Movie Event Workshops at a Senior Center

The Activities Director at a San Francisco senior center—which 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. The Director learned about the importance of ACP from Facebook 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 easy online access.

As the Director had general autonomy around programming, they checked with the senior center's Executive Director and got the go-ahead to pilot an ACP workshop featuring PREPARE's videos and resources. The Director downloaded the PREPARE Movie Toolkit and Question Guide, became familiar with them, and began planning for a 90-minute workshop.

The senior center had a room, a large screen, and internet access, so the Director focused on finding a suitable 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 senior center's weekly newsletter, posted flyers 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 printed copies of the Question Guide and California easy-to-read advance directive directly from the PREPARE website for all participants. Following the Toolkit's instructions, they ran a successful workshop for 12 English-

speaking and bilingual people; 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 participants' questions. They also referred participants to their medical provider if their questions were too complicated.

At the end of the workshop, the senior center used a template included in the Toolkit to get participant feedback. Using that feedback, they planned two more workshops to be conducted in Spanish. With this experience under their belt, the Director began running the PREPARE workshop quarterly, including one session entirely in Spanish, to provide a regular "dose" of ACP for the senior center's members.

[Licensing](#): No license was required because the organization printed copies of materials directly from the PREPARE website and used the [PREPAREforYourCare.org](#) URL to screen the Step Movies. The organization did not post PREPARE materials on its website, did not include PREPARE materials within its own print materials, and did not email PREPARE materials. It was also not interested in using the PREPARE materials in research, quality improvement initiatives, or for data reporting purposes.

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[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 sought 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 incorporate ACP into practice more routinely, particularly with patients with serious illness and their Spanish-speaking patients. The nurse practitioner shared the PREPARE website and materials with these clinicians, and together, they started to explore different approaches to using these resources. The nurse practitioner went through the PRISM questions with their colleagues and came up with several ideas, including:

- Sending the "PREPAREforYourCare.org" URL 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 for Your Care™ Simple Scripts to help start ACP conversations; and
- Training staff to conduct group medical visits with the PREPARE Movie Event Toolkit and Question Guide.

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

Over the course of three months, as people in the center 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 quality improvement project with a subset of patients. It used those learnings to improve its 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 clinic branding or logo on the materials, so that they would know they were coming from a trusted source.

Licensing: A Basic Research License, followed by a Standard License, was needed. The working group first led a small, internal quality improvement initiative. The team then obtained approval from leadership to enter into a Standard License with PREPARE and the Regents of the University of California. A Standard License allowed the center to add its logo and contact information to the licensed advance directive and pamphlet and roll them out across the clinic.

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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, the physician 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, the physician 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.

The physician 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 provided on the PREPARE website. Impressed with the presentation and research evidence behind PREPARE, particularly related to reaching historically marginalized populations, the Executive Director decided to name ACP as a quality metric priority for their Medicare and Medicare Advantage patients for the upcoming year. They also authorized an ACP working group, to be led by the primary care physician, to assess the system's readiness.

Using the PRISM questions, the workgroup began to speak individually with various 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.

The workgroup partnered with the health system's EHR team to send messages to older patients about PREPAREforYourCare.org through the patient portal. They also sent them ACP messages containing printed PREPARE materials in the mail. In addition, they chose their first primary care pilot site. They provided brief training to those clinicians using PREPARE for Your Care™ Simple Scripts and the ACP Toolkit to begin to incorporate into and bill for ACP discussions during the Medicare Annual Wellness Visit. The workgroup piloted a series of PREPARE Group Medical Visits using the PREPARE Group Movie Event Toolkit and training materials as well.

During this initial phase, the workgroup heard from patients and providers that adding the health system's logo and colors to the PREPARE materials would help to build trust in their ACP programs. Furthermore, it learned that a Powered by PREPARE License would allow the customization of certain PREPARE materials, including permission to white

label them. In addition, it would include tested, easy-to-read messages about ACP, saving the workgroup from needing to iterate upon theirs further. The workgroup brought this to the attention of the Executive Director of the Office of Population and Accountable Care and the senior management team.

Licensing: A Basic Research License, followed by a Powered by PREPARE License, was needed. The initial phase was a quality improvement initiative and included mass distributing the PREPAREforYourCare.org URL via the electronic health record. The workgroup then obtained approval for a Powered by PREPARE License with PREPARE and the Regents of the University of California, which granted permission for the health system to change the look of materials so that patients would understand they were part of its regular care. The workgroup plans to expand its ACP program to clinicians throughout the health system so that all older patients can engage with the PREPARE materials and in the ACP process.

PREPARE for Your Care™ provides easy-to-use, evidence-based, culturally- and literacy-appropriate materials 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. Organizations can use these materials in various ways to meet their unique needs. Please see the Provider and Community Tools section of the PREPARE for Your Care™ website.

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PREPARE for YOUR Care: Interactive, online, step-by-step program that guides users through five essential steps for their own high-quality ACP.

PREPARE for THEIR Care: Online, step-by-step caregiver program that helps caregivers start conversations with their family and friends and supports caregivers in making medical decisions for others.

Easy-To-Read Advance Directives: State-specific, legally compliant, easy-to-read advance directives in multiple languages. PREPARE for YOUR Care can guide users through completing a form.

Getting Started With PREPARE: In addition to this document, the following tools introduce PREPARE and how you can use the program.
- **PREPARE Informational Slide Set:** Slide set describing the need for advance care planning, the PREPARE program, the evidence base behind it, and how it can be used in your organization.
- **How to Use PREPARE Tools for Providers and Organizations:** A brief summary of the PREPARE tools, how to use them, and how to license them.

Patient and Caregiver Handouts: In addition to the easy-to-read advance directives, the following handouts can be given to patients and caregivers.
- **PREPARE for YOUR Care Program Guide Pamphlet**: A pamphlet briefly summarizing the PREPARE for YOUR Care 5 Steps.
- **PREPARE for YOUR Care Quick Start Guide**: Instructions to help users get into and start using the online PREPARE for Your Care program.
- **PREPARE for THEIR Care Program Guide Pamphlets**: Pamphlets to support caregivers, one on "How To Help Other People with Their Medical Planning" and one on "How To Make Medical Decisions for Other People."

[Communication Guides for Providers and Organizations](#): These guides help anyone start an advance care planning conversation, including medical providers, health navigators, and staff at community organizations.

- **Simple Advance Care Planning Scripts for Everyone**: Brief scripts to start advance care planning conversations.
- **Advance Care Planning Toolkit**: In-depth instructions and scripts to start an advance care planning conversation and discuss PREPARE tools.

[Group Medical Visits or Movie Events for Patients](#): These materials help with group medical visits and PREPARE for YOUR Care group movie events.

- **PREPARE for YOUR Care Toolkit for Group Movie Events**: Toolkit for anyone to organize a group medical visit or group movie event at a medical center, library, senior center, place of worship, or other community settings. You do not need experience with advance care planning, because ALL the information is provided in the PREPARE for YOUR Care movies.
- **PREPARE for YOUR Care Movies**: Each of the 5 PREPARE for YOUR Care Steps can be watched in a full movie format. They can be used in group medical visits or group movie events.
- **PREPARE for YOUR Care Movie Event Question Guide**: This Question Guide helps people follow along with the questions about their medical wishes in the PREPARE for YOUR Care Step movies. This is not an advance directive.

[PREPARE for THEIR Care Toolkit for Group Movie Events](#): Toolkit to organize a group movie event for caregivers at a medical center, library, senior center, place of worship, or other community settings. You do not need experience with advance care planning, because ALL the information for caregivers is provided in the PREPARE for THEIR Care Movies.

[Advance Care Planning Engagement Survey](#): A validated, easy-to-use survey that measures behavior change in response to advance care planning interventions. The survey is available in a patient-facing and surrogate-facing version. Each version is available in multiple languages.