

Checklist for recording and sharing advance care planning discussions

Recording advance care plans

1. What to record?

- ✔ **Decisions, wishes or preferences** that individuals and family / carers have made regarding future care during **either informal conversations** with individuals or family / carers **or a planned advance care planning discussion**.
- ✔ **Any worries or concerns** that individuals or family / carers have, or any areas where decisions are not final and need to be considered or discussed further at some point in the future.

2. How to record?

- ✔ Advance care plan decisions, preferences and wishes should be recorded within **professional guidance and standards and local policies and procedures**.
- ✔ **Detail:** Give as much detail as possible but be clear and unambiguous. Some decisions may need to be legally recorded e.g. Advance Decision to Refuse Treatment (ADRT) and/or Power of Attorney.
- ✔ **Document dates** of conversations, who they were with and how / where the meeting took place. Check policies and procedures in your work setting about how to record this information.

3. Where to record?

- ✔ Recording and storing of an advance care plan will depend on an **organisation's care record system**. This may be a paper patient record, an Electronic Patient Record (EPR) or a combination of both.
- ✔ The information recorded in an advance care plan should be **easily accessible to a range of multi-disciplinary health and care professionals**.

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Sharing advance care plans

1. An advance care plan should **follow an individual throughout their care journey**.
2. **Consent** is needed from the individual before sharing an advance care plan. (Sometimes you may need to share advance care plans without documented consent, if this is in the best interests of the individual. Check the policy for this within your own work setting or seek advice from a senior member of your team.)
3. Share the advance care plan with **all involved** with the individual's care (subject to consent) including;
 - ✓ The individual
 - ✓ Family / carers
 - ✓ Community provider
 - ✓ Out of hours health care provider
 - ✓ Emergency care providers
 - ✓ GP practice
 - ✓ Others present during the advance care planning discussion