

Advance Care Planning Goals of Care Designation (ACP/GCD) Tracking Record

Accessing and using it in Connect Care

Developed by AHS's Advance Care Planning Goals of
Care Designation Team – Calgary Zone
October 2023

Topics

- What is the Advance Care Planning Goals of Care Designation (ACP/GCD) Tracking Record?
 - Who should document on it?
 - Sample Tracking Record entries
 - Why is it important to use the Tracking Record?
 - What Do I Do with the Tracking Record?
 - Accessing and printing the Tracking Record in Connect Care
 - Resources
-

What is the ACP/GCD Tracking Record?

- The ACP/GCD Tracking Records are AHS forms that healthcare providers use to document conversations that have taken place regarding a patient's Advance Care Plan and Goals of Care Designation (GCD) or related topics.
 - The forms reflect what was talked about, who was involved, what was decided and the reasons for the decisions, from the oldest to most recent conversations.
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Paper version – still being used in community

[illegible]

Aegea, Charlie-IP (MRN 1000476877)

Encounter Date: 14/10/2023

Aegea, Charlie-IP

MRN: 1000476877

Aegea, Ian-IP, MD

Physician

Specialty: Internal Medicine

Tracking Record Addendum

Date of Service: 16/10/2023 11:17

Present: patient Mrs. Smith, daughter Angie, and son John.

Mrs. Smith knows that she has a life limiting illness. She wants to know her prognosis and understands that she has less than 2 years. We have discussed that something may happen suddenly that would shorten that prognosis.

Her goals are to stay in her house as long as possible and spend time with her family. She prefers no ICU or CPR. Her family knows her preferences and a M2 GCD was determined . Mrs. Smith is in agreement.

ED to Hosp-Admission (Current) on 14/10/2023

Revision History

Date/Time	User	Provider Type	Action
16/10/2023 11:21	Aegea, Ian-IP, MD	Physician	Addend
16/10/2023 11:19	Aegea, Ian-IP, MD	Physician	Addend
16/10/2023 11:17	Aegea, Ian-IP, MD	Physician	Sign

Care Timeline

14/10 08:10

EGD TRANSORAL BIOPSY SINGLE/MULTIPLE

14/10 16:10

Admitted from ED 16:10




Aegea, Charlie-IP (MRN 1000476877) DOB: 14/10/1963 Printed at 16/10/2023 11:22

Page 1 of 1

Who should be documenting on the ACP/GCD Tracking Record?

- The Tracking Record is for any health care professional or member of the healthcare team to use to document key elements of any Advance Care Planning, Goals of Care, or related conversations (such as, Serious Illness Conversations) they have had with a patient or their alternate decision maker.
 - Patients and families don't write on this form.
-

Sample Tracking Record Entry Paper Version

- Captures who was present for conversation 
- Captured key elements of conversation. 
- Paper version has conversation prompts 





Affix patient label within this box

Advance Care Planning/Goals of Care Designation Tracking Record

- Purpose: to document the content of Advance Care Planning (ACP)/Goals of Care Designation (GCD) conversations and/or decisions.
- Benefits:
 - Assists healthcare providers in being aware of previous conversations and to understand the reasons underlying the current GCD order.
 - Gives clues about where to pick up the conversation if decisions need to be reviewed or confirmed.
- The ACP GCD Tracking Record is a continuous record that goes in the Green Sleeve. Documenting on both Tracking Record and progress note may be necessary to ensure transfer of critical information.
- The original form is kept in the patient's Green Sleeve. When the patient moves to a new care setting, including home, a copy remains with the sending facility.

Date (yyyy-Mon-dd)	Site/ Attendees	Conversation Summary Notes	Required Documentation
2018, Sep-20	FMC, Dr. Matthew & Angie (daughter), John (son)	Mrs. Smith knows that she has a life limiting illness. She wants to know her prognosis and understands that she has less than 2 years. We have discussed that something may happen suddenly that would shorten that prognosis. Her goals are to stay in her house as long as possible and spend time with her family. She prefers no ICU or CPR. Her family knows her preferences and a M2 GCD was determined. Mrs. Smith is in agreement.	Any member of the healthcare team can record conversations on this form. Include who was involved in today's discussions (i.e. patient, family, healthcare provider Include name and relationship/discipline) Summarize conversation and/or key decisions from today's discussion It helps to document responses to the following speaking prompts.
			■ Have you completed a Personal Directive? ■ Have you selected an alternative decision maker? If so do they know your wishes? ■ What is your understanding now of where you are with your illness? ■ If your health situation worsens what are your important goals? ■ Do you know if you have a Green Sleeve? ■ Do you know if you have a Goals of Care Designation (GCD) order?

Sample Tracking Record Entry Connect Care Version

- Captures who was present for conversation 
- Captured key elements of conversation. 

Aegea, Charlie-IP

MRN: 1000476877

Aegea, Ian-Ip, MD

Physician

Specialty: Internal Medicine

Tracking Record
Addendum

Date of Service: 16/10/2023 11:17



Present: patient Mrs. Smith, daughter Angie, and son John.



Mrs. Smith knows that she has a life limiting illness. She wants to know her prognosis and understands that she has less than 2 years. We have discussed that something may happen suddenly that would shorten that prognosis.

Her goals are to stay in her house as long as possible and spend time with her family. She prefers no ICU or CPR. Her family knows her preferences and a M2 GCD was determined. Mrs. Smith is in agreement.

ED to Hosp-Admission (Current) on 14/10/2023

Revision History

Date/Time	User	Provider Type	Action
16/10/2023 11:21	Aegea, Ian-Ip, MD	Physician	Addend
16/10/2023 11:19	Aegea, Ian-Ip, MD	Physician	Addend
16/10/2023 11:17	Aegea, Ian-Ip, MD	Physician	Sign

Care Timeline

14/10 08:10	EGD TRANSORAL BIOPSY SINGLE/MULTIPLE
14/10 16:10	Admitted from ED 16:10

Why Using The Tracking Record Is Important

Documenting Advance Care planning, Goals of Care, and related conversations on the Tracking Record is important because the Tracking Record is ***provided to the patient*** upon discharge/transfer (in a Green Sleeve with their GCD order). In Connect Care, Tracking Records are labeled as such for easy filtering.

If these conversations are documented elsewhere in the patient chart (for example, buried in consult or progress note), other healthcare providers may not readily access them.

Benefits of using the Tracking Record

- Helps the next healthcare provider understand the reasons for the current GCD and Goals of Care decisions.
 - Gives clues about where to pick up the conversation if decisions need to be made, reviewed or confirmed.
 - Saves people from having to tell their story over and over.
 - Allows for correct and consistent interpretation of the current GCD order.
 - Shows that these conversations occurred with the patient.
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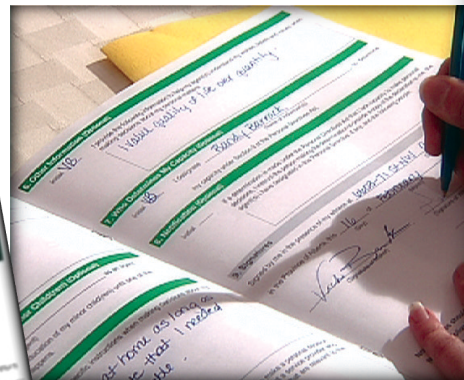
What Do I Do with the Tracking Record?

- The Tracking Record is the property of the patient.
 - After you document on the Tracking Record, it should be reviewed with the patient for accuracy and to ensure consistency with any Goals of Care decisions.
 - The tracking Record needs to be printed out and ***provided to the patient*** in a Green Sleeve (with their current GCD order) upon discharge/transfer.
-

The Green Sleeve: A Patient's "Health Passport" (Paper Version Document images)



Green Sleeve



Personal Directive
(copy)

ACP/GCD
Tracking Record

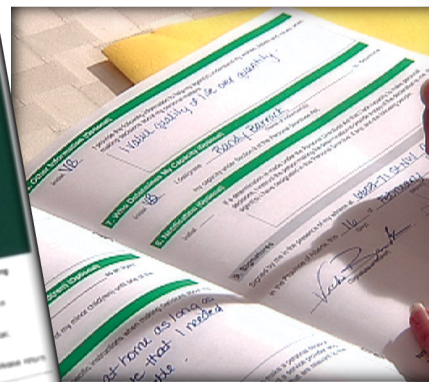
GCD
Order Form

With paper versions of AHS Documents – originals given to patient in Green Sleeve, keep copies for the health record/chart.

The Green Sleeve: A Patient's "Health Passport" (Connect Care document images)



Green Sleeve



Personal Directive
(copy)

Agea, Charlie-IP (MRN 1000476877) Encounter Date: 14/10/2023

Agea, Charlie-IP

Agea, Ian-IP, MD
Physician
Specialty: Internal Medicine
Tracking Record Signed Date of Service: 16/10/2023 11:17

Sample

ED to Hosp-Admission (Current) on 14/10/2023

Care Timeline

14/10/23	EGD TRANSORAL BIOPSY SINGLE/MULTIPLE
08:10	
14/10/23	Admitted from ED 16:10
16:10	

Agea, Charlie-IP (MRN 1000476877) DOB: 14/10/1963 Printed at 16/10/2023 11:18

ACP/GCD

Tracking Record – printed
from Connect Care

Agea, Charlie-IP (MRN: 1000476877) DOB: 14/10/1963

☒ verified

Place this document in the Patient's Green Sleeve. Mark all previous Goals of Care Designation orders as "VOID", date and initial.

Goals of Care Designation (GCD) Order

Patient: Charlie-IP Agea
United States of America
Phone: 608-889-4465
DOB: 14/10/1963
Gender: M

Date: 16/10/2023 Time: 11:26

Goals of Care Designation Order

M1 = Medical care with transfer to Acute care when required and without the option for life-saving ICU care

Directed at cure or control in any location of care, without accessing a tertiary level ICU. Treatment of illness may include transfer to an acute or tertiary care facility. All active medical and surgical interventions aimed at cure and control of conditions are considered, within the bounds of what is clinically indicated, and excluding the option of admission to a tertiary level ICU for life-saving interventions. If a person deteriorates further and is no longer amenable to cure or control interventions, the goals of care designation should be changed to focus on comfort primarily.

The following clarifications apply to this GCD order

Patient's location of care when this GCD order was placed

Edm Wmc University Of Alberta Hospital

Involvement of the patient or Alternate Decision Maker (ADM) prior to ordering this GCD

Patient

Names of formally appointed or informal ADMs should be noted on the ACP/GCD Tracking Record if applicable

Name of Physician / Designated Most Responsible Health Practitioner who has ordered this GCD	Discipline
Agea, Ian-IP, MD	Physician - Internal Medicine
Signature	Date (dd-Mon-yyyy)
Signed electronically in Connect Care	16/10/2023

Printed on 16/10/2023

16/10/2023 11:26 Page 1 of 1

GCD

Order Form – printed from
Connect Care

With Connect Care versions of AHS
Documents – print outs are given to the
patient in Green Sleeve

Accessing the ACP/GCD Tracking Record In Connect Care:

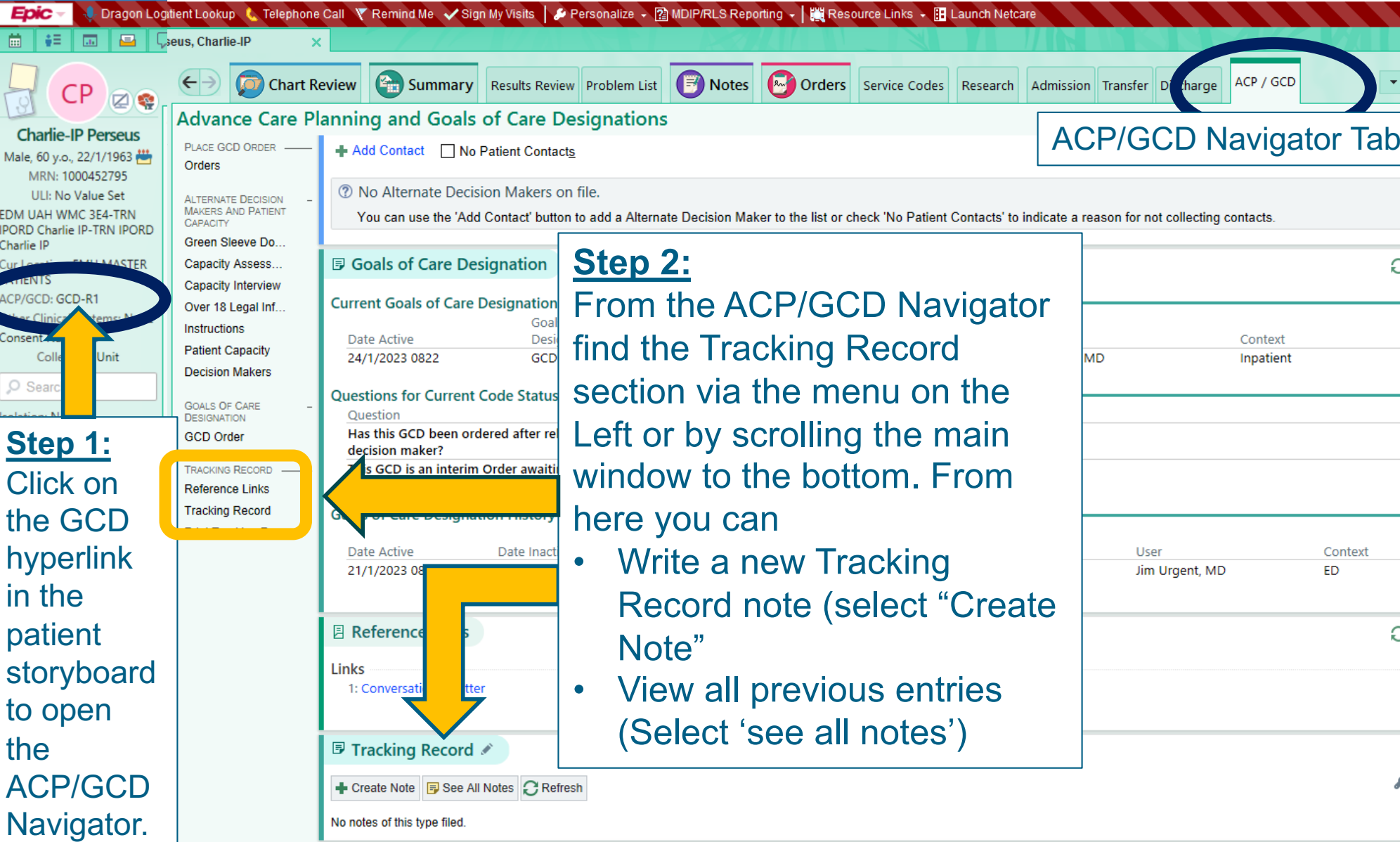
Option 1 – via the ACP/GCD Navigator

Access ACPGCD Tracking Record via the **ACP/GCD Navigator:**

- Click the GCD hyperlink in patient storyboard to open the ACP/GCD Navigator.
- From the ACP/GCD navigator you can access the Tracking Record, view previous entries, and create a new note from the menu on the Left or by scrolling the main window down. See next slide for images.



Accessing the Tracking Record in Connect Care via the ACP/GCD Navigator



Step 1: Click on the GCD hyperlink in the patient storyboard to open the ACP/GCD Navigator.

Step 2: From the ACP/GCD Navigator find the Tracking Record section via the menu on the Left or by scrolling the main window to the bottom. From here you can

- Write a new Tracking Record note (select “Create Note”)
- View all previous entries (Select ‘see all notes’)

Viewing Previous Tracking Record Entries in Connect Care via the ACP/GCD Navigator

The screenshot displays the Connect Care ACP/GCD Navigator interface. The top navigation bar includes tabs for Chart Review, Summary, Results Review, Problem List, Notes, Orders, Service Codes, Research, Admission, Transfer, Discharge, and ACP / GCD. The ACP / GCD tab is circled in blue. The main content area is titled 'Advance Care Planning and Goals of Care Designations'. On the left sidebar, the 'Tracking Record' section is highlighted. A yellow arrow points from the 'Tracking Record' section to the 'Notes' tab in the top navigation bar. Another yellow arrow points from the 'Notes' tab to the 'See All Notes' button in the bottom left. A third yellow arrow points from the 'See All Notes' button to the 'Notes' tab in the top navigation bar. A fourth yellow arrow points from the 'Notes' tab to the 'Addendum' section on the right.

Step 1:
From the ACP/GCD Navigator find the Tracking Record section. Select "See All Notes"

Step 2:
The 'Notes' tab with a list of all previous Tracking Record entries will open. From the list, select the entry you wish to view and it will open in the Rt Sidebar.

Notes

All Notes | Previous Notes | Cons...

Number of notes shown: 2 out of 2

Today

- Ian-Ip Perseus, MD
Physician
Internal Medicine...
- Ian-Ip Perseus, MD
Physician
Internal Medicine...
Date of Service: 24/01 1357
File Time: 24/01 1401
Addendum

Addendum

Mr.Perseus stated he would like his daughter Bonnie to be his decision maker should he become unable to make his own healthcare decisions. Mr.Persues advised to write a Personal Directive as he currently does not have one. Conversations Matter Guidebook provided. Mr.Persues will review it and is aware he can contact the Office of the Public Guardian if needing help.

Documenting on the Tracking Record in Connect Care via the ACP/GCD Navigator

The screenshot displays the Connect Care ACP/GCD Navigator interface. The top navigation bar includes options like 'Chart Review', 'Summary', 'Results Review', 'Problem List', 'Notes', 'Orders', 'Service Codes', 'Research', 'Admission', 'Transfer', 'Discharge', and 'ACP / GCD'. The 'ACP / GCD' tab is highlighted with a blue circle. The left sidebar lists various sections, including 'Advance Care Planning and Goals of Care Designations', 'Goals of Care Designation', and 'Tracking Record'. The 'Tracking Record' section is highlighted with a blue box. A yellow arrow points from the 'Tracking Record' section to a modal window titled 'My Note Tracking Record'. This modal window contains a text area for entering a note, a toolbar with various icons, and buttons for 'Sign', 'This Visit', and 'Edit Note'. A yellow arrow points from the 'Create Note' button in the bottom left of the modal to the 'Tracking Record' section in the sidebar.


Step 1:
From the ACP/GCD Navigator find the Tracking Record section. Select "Create Note"

Step 2:
Enter your note on the Tracking Record that opens on the Right sidebar. Smart tools are allowed.

Printing the Tracking Record from Connect Care

- Printing the Tracking Record from the ACP/GCD Navigator is *not* currently an option.
- **Printing the Tracking Record needs to be done via the 'Chart Review Notes tab'**

Printing ACP/GCD Tracking Record

1. In Chart Review, select Notes.
2. Find and Select the Tracking Note you would like to print. When you select the tracking note, a preview window will open on the right hand side.
3. Click the  print symbol.
4. A print window will open allowing you to select the printer of your choice.

See next slide for images

Printing the Tracking Record from Connect Care via 'Chart Review' ...

The image displays two screenshots of the Epic Connect Care interface, illustrating the process of printing a tracking record.

Top Screenshot: Chart Review

The 'Chart Review' screen shows patient information for Charlie-IP Aegea (Male, 60 y.o., 14/10/1963, MRN: 1000476877). The patient is currently in the ED. The 'Tracking Record' is visible, showing a service on 14/10/2023 at 11:17. The 'Recent Notes' section lists several notes, including 'H&P', 'ED Provider Notes', 'Post-Procedure Note', 'ED Triage Notes', and 'Consults'. The 'Index' on the right shows various navigation options like 'Checklists | Planning', 'Problems, Hx', 'Meds, Imm | Adv', 'Vitals, IO, lines', 'Recent results', 'Risks, Screening', 'Notes | Letter', 'Forms', 'Encounter team', 'Problem charting', 'Blood | Med admin', 'Summaries | Scores', 'Warnings, EWS', 'Billing | Stickers', and 'Other systems'.

Bottom Screenshot: Report Viewer

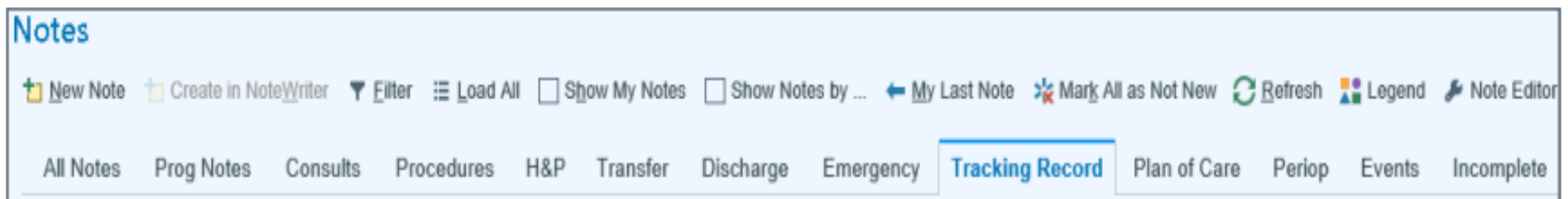
The 'Report Viewer' screen displays the 'Tracking Record' for the same patient. The 'Report History' section shows a report titled 'Aegea, Ian-IP, MD' (Physician, Internal Medicine) dated 16/10/2023 11:17. The 'Care Timeline' shows the patient's admission to the ED on 14/10/2023. The 'Revision History' table shows the report was added and signed by Aegea, Ian-IP, MD on 16/10/2023. The 'Index' on the right is identical to the top screenshot.

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Accessing the Tracking Record In Connect Care: **Option 2 – via “Chart Review Notes Tab”**

In addition to printing the Tracking Record via the Chart Review Notes tab (see previous slide), you can also access the Tracking Record to document a new entry and to review previous entries this way.

- In Chart Review, select Notes
- Sort or Filter by Note Type
 - Select Tracking Record



Viewing Tracking Record Entries In Connect Care via the “Chart Review Notes Tab”

View All ACP Related Notes Entries

1. In ACP/GCD navigator, select Tracking Record.
2. Tracking Record Notes will display
3. Click **See All Notes** to go to the notes activity.
4. Select Tracking Record tab. This is where you can see all notes of this type that have been filed during the inpatient admission

Notes

New Note

Create in NoteWriter

Filter

Load All

☐ Show My Notes

☐ Show Notes by ...

My Last Note

Mark All as Not New

Refresh

Legend

Note Editor

All Notes Prog Notes Consults Procedures H&P Transfer Discharge Emergency **Tracking Record** Plan of Care Periop Events Incomplete

Number of notes shown: 2 out of 2. All loaded.

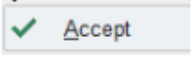


All ACP Tracking Record notes are also visible in Chart Review Notes tab. Sort or filter by Note Type



Documenting on the Tracking Record In Connect Care via the “Chart Review Notes Tab” Add a new note (Inpatient)

Add a New Tracking Record Note with Notes activity (Inpatient)


1. In the Notes Activity Section click New Note.
2. In Type: Tracking Record 
3. Choose Service Area if requested
4. Complete narrative – Smart tools are allowed.
5. Once you sign the note, the note will show in Notes Activity under Tracking Record.

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Printing the Tracking Record from Connect Care using the Chart Review Notes Tab

- **This is currently the only way to print Tracking Records from Connect Care**

Printing ACP/GCD Tracking Record

1. In Chart Review, select Notes.
2. Find and Select the Tracking Note you would like to print. When you select the tracking note, a preview window will open on the right hand side.
3. Click the  print symbol.
4. A print window will open allowing you to select the printer of your choice.

See next slide for images.

Printing the Tracking Record from Connect Care via 'Chart Review' ...

The image displays two screenshots of the Epic Connect Care interface, illustrating the process of printing a tracking record.

Top Screenshot: Chart Review

The 'Chart Review' screen shows patient information for Charlie-IP Aegea (Male, 60 y.o., 14/10/1963, MRN: 1000476877). The patient is currently in the ED. The 'Tracking Record' tab is selected, showing a list of encounters. A red circle highlights the 'Tracking Record' tab in the top navigation bar.

Service Date	Note Date	Note Type	Enc Type	Author	Service	Linked Surgery
Today	Today at 11:17	Today at 11:21	Tracking Record	ED to Hosp-Ad...	Me	
14/10/2023 07:54	14/10/2023 14:22	H&P	ED to Hosp-Ad...	Whitecoat, Walt, MD - ...	Emergency Medicine	
14/10/2023 07:43	14/10/2023 08:50	ED Provider Notes	ED to Hosp-Ad...	Urgent, Jim, MD - Ph...	Emergency Medicine	
14/10/2023 07:39	14/10/2023 08:39	Post-Procedure Note	ED to Hosp-Ad...	Gastroenterology, Ph...	Gastroenterology	
14/10/2023 07:37	14/10/2023 14:20	ED Triage Notes	ED to Hosp-Ad...	Gurney, Deb, RN - R...	Emergency Medicine	
14/10/2023 07:01	14/10/2023 14:48	Consults	ED to Hosp-Ad...	Gastroenterology, Ph...	Gastroenterology	

Bottom Screenshot: Report Viewer

The 'Report Viewer' screen shows the 'Tracking Record' report for Charlie-IP Aegea. The report is titled 'Aegea, Ian-IP, MD' and 'Tracking Record Addendum'. The report content includes a summary of the patient's condition and a list of encounters. A red circle highlights the 'Tracking Record' tab in the top navigation bar.

Report Content:

Aegea, Ian-IP, MD Tracking Record Addendum Date of Service: 16/10/2023 11:17
Physician Specialty: Internal Medicine

Present: patient Mrs. Smith, daughter Angie, and son John.

Mrs. Smith knows that she has a life limiting illness. She wants to know her prognosis and understands that she has less than 2 years. We have discussed that something may happen suddenly that would shorten that prognosis.



Her goals are to stay in her house as long as possible and spend time with her family. She prefers no ICU or CPR. Her family knows her preferences and a M2 GCD was determined. Mrs. Smith is in agreement.

Revision History

Date/Time	User	Provider Type	Action
16/10/2023 11:21	Aegea, Ian-IP, MD	Physician	Addend
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16/10/2023 11:17	Aegea, Ian-IP, MD	Physician	Sign

AHS Connect Care Resources

ACP/GCD Navigator Quick Start Guide

	Connect Care Advance Care Planning/ Goals of Care Designation (ACP/GCD) Quick Start Guide
Contents	
Advance Care Planning (ACP) and Goals of Care Designation (GCD)	3
View Advance Care Planning Documents and Goals of Care Designation	3
Edit ACP/GCD Related Information	3
Goals of Care Designation (GCD) Orders	4
Inpatient GCD Order - Most Responsible Health Provider (MRHP)	4
Inpatient GCD Order from ACP/GCD Navigator	5
Ambulatory	6
Change Current Goals of Care Designation (GCD) - Order	7
Advance Care Planning (ACP) Documents	8
Add a New Document	8
Expiring/Retiring Documents from the Documents Table	10
Capacity Assessment and Capacity Interview	11
Capacity Status	11
Over and Under 18 Legal Information	11
Decision Making Authority	12
Add a new Contact who is an Alternate Decision Maker	12
Update a Contact in the list to show they are an Alternate Decision Maker	12
Edit or remove a contact that is in the list	13
Change an Alternate Decision Maker Status to/from Active	13
Attach a Previously Scanned Decision Making Authority Document To a Listed Contact	14
Mature Minor Assessment	14
ACP/GCD Tracking Record	14
Create an ACP/GCD Tracking Record note entry	14
Add a New Tracking Record Note with Notes activity (Inpatient)	14
View All ACP Related Notes Entries	15
Printing ACP/GCD Documents for the Green Sleeve	15
Printing ACP/GCD Tracking Record	15
Reprinting a GCD Order	15
Reprinting a GCD Order – Inpatient Alternative	16
.....	16
CC0688(2022-10)	Page 1 of 18
	Alberta Health Services

Available via Insite (AHS employees).

➤ Search “ACP/GCD Navigator”

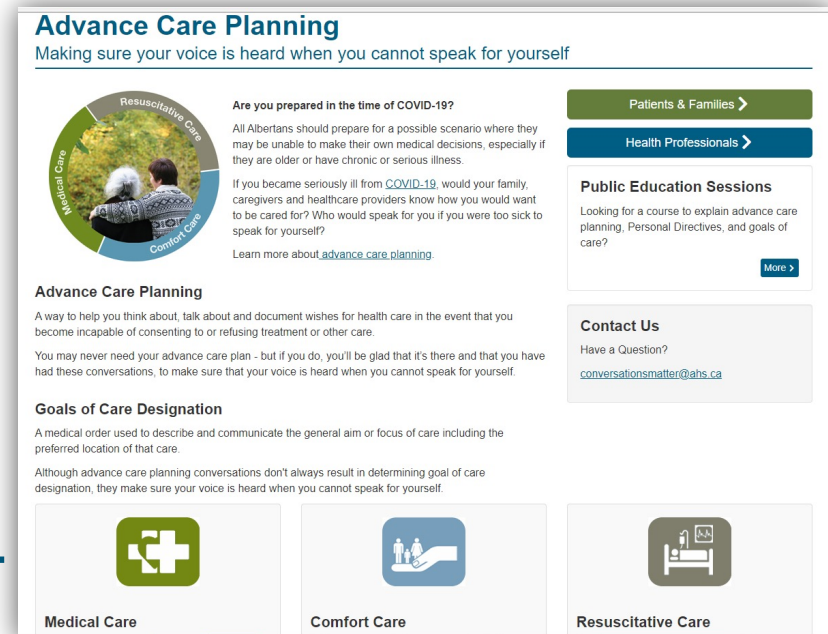
- Complete Instructions on accessing Advance Care Planning/Goals of Care Designation information.
- Includes some workflow processes around GCD reconciliation.

AHS ACP/GCD Resources and Contact

E-Mail: ConversationsMatter@ahs.ca

Website: www.ConversationsMatter.ca

- Policy & Procedure
- Dispute Resolution
- FAQ
- Forms
- E-module



The screenshot displays the 'Advance Care Planning' website. At the top, the title 'Advance Care Planning' is followed by the tagline 'Making sure your voice is heard when you cannot speak for yourself'. A circular graphic on the left illustrates three care paths: 'Resuscitative Care' (top), 'Medical Care' (left), and 'Comfort Care' (bottom). The main content area includes a section titled 'Are you prepared in the time of COVID-19?' with text about preparing for a possible scenario where one may be unable to make medical decisions. Below this is a section for 'Advance Care Planning' explaining its purpose and a 'Goals of Care Designation' section. On the right side, there are navigation buttons for 'Patients & Families' and 'Health Professionals', a 'Public Education Sessions' section with a 'More >' link, and a 'Contact Us' section with the email 'conversationsmatter@ahs.ca'. At the bottom, three icons represent 'Medical Care' (a green cross), 'Comfort Care' (a blue icon of a person in bed), and 'Resuscitative Care' (a brown icon of a person in bed).