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

Alberta Health Services

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.

ACP/GCD Tracking Record Images

Paper version (Alberta Health Services form)

Alberta Health Services

Advance Care Planning/Goals of Care Designation Tracking Record

Affix patient label within this box

- 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
		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?

103152(Rev2018-06)   Learn more - www.conversationsmatter.ca   Page 1 of 1 (Side A)

Paper version – still being used in community

Tracking Record printed out from Connect Care

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 ⭐

Alberta Health Services

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.Matthews, 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?

103152(Rev2018-06) Learn more - www.conversationsmatter.ca Page 1 of 1 (Side A)

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

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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.

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
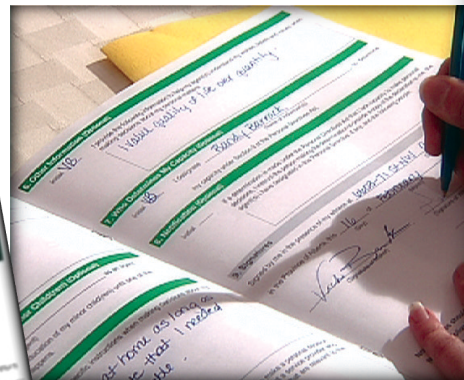
Personal Directive (copy)

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)

ACP/GCD Tracking Record – printed from Connect Care

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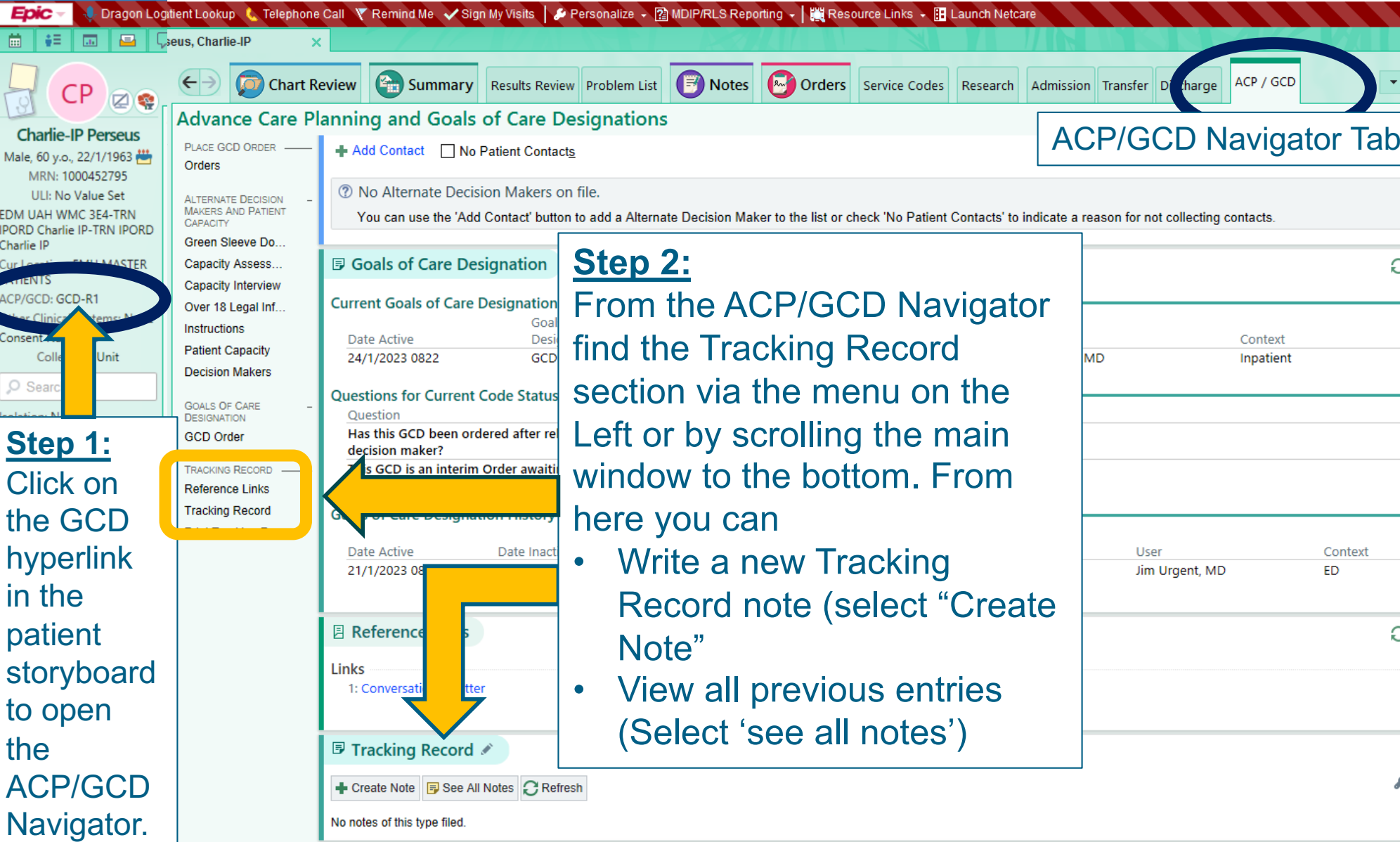
Access ACPGCD Tracking Record via the **ACP/GCD Navigator**:

- 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

ACP/GCD Navigator Tab

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

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.

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

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] 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'

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

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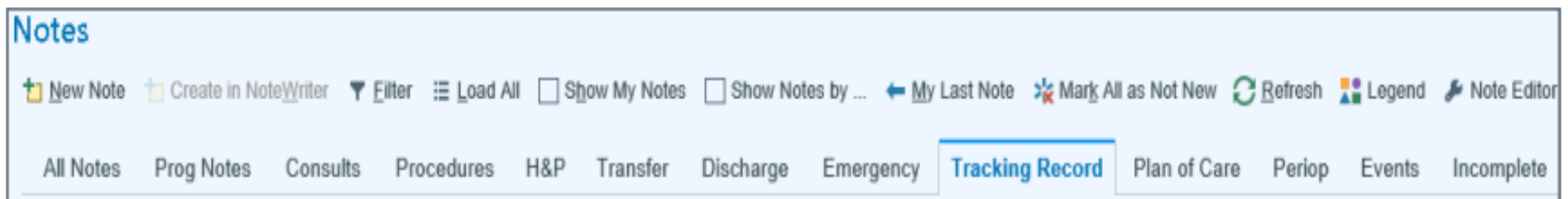
Viewing Tracking Record Entries In Connect Care via the "Chart Review Notes Tab"

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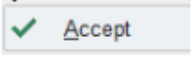
All ACP Tracking Record notes are also visible in Chart Review Notes tab. Sort or filter by Note Type

Documenting on the Tracking Record In Connect Care via the "Chart Review Notes Tab"
Add a new note (Inpateint)

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

1. In the Notes Activity Section click New Note.

2. In Type: Tracking Record ✓ Accept

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.

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

- **<mark>This is currently the only way to print Tracking Records from Connect Care</mark>**

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 icon] 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'

AHS Connect Care Resources
ACP/GCD Navigator Quick Start Guide

Available via Insite (AHS employees).
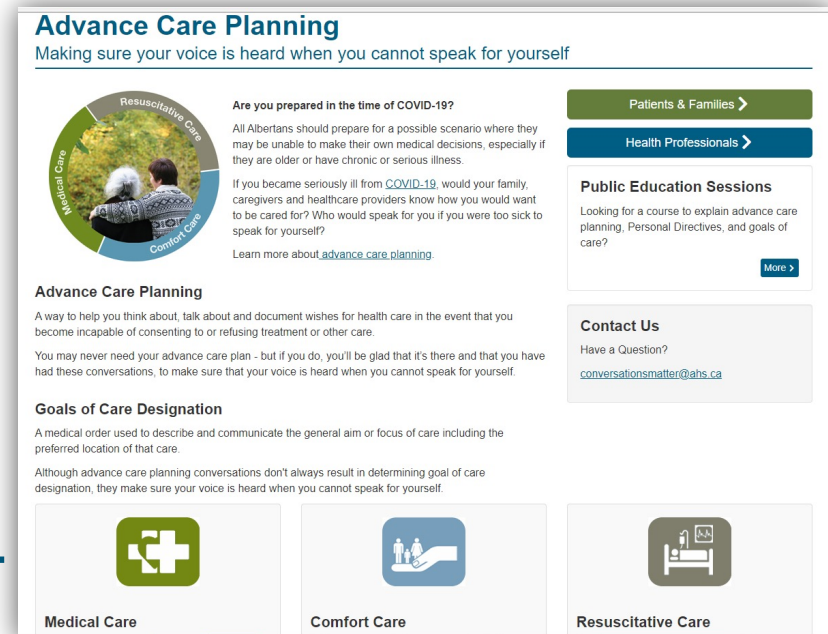
➢ Search "ACP/GCD Navigator"

- 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