



Conversation Guide for Patients and Caregivers for Identifying Their Health Priorities

The purpose of this program

To make sure your health care lines up with *your* priorities.



Step 1

Exploring what matters

In this step, you will:

- **Identify** what matters most to you in your life and health
- **Describe** what you want your healthcare to do for you

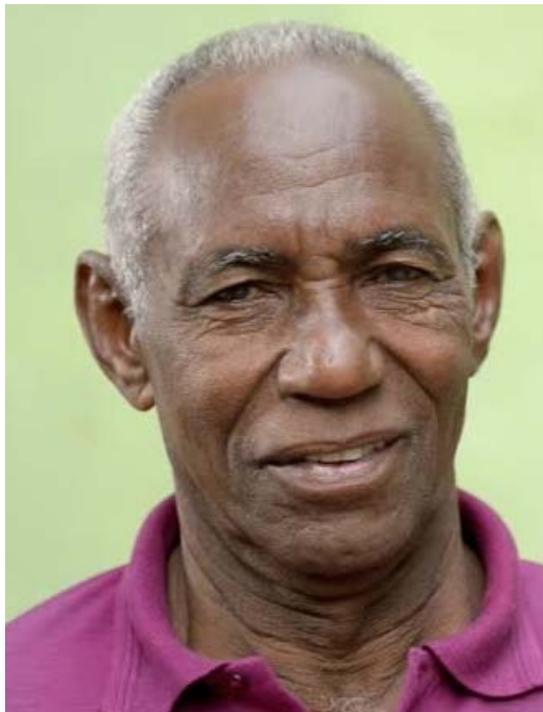


What is important to you

Four important parts of your life:

Connecting • **Enjoying Life** • **Functioning** •
Managing Health





Meet Dave! He's a 74 year old widower with diabetes, heart disease, and arthritis.

You'll follow Dave's example throughout this book to help you understand how to answer the questions.

What matters most: Dave's Example

Write your answers, OR just say them.

Connecting

Family, friends, spirituality/religion, community

Which relationships or connections are most important to you?

My daughter, my dog, friends from church

Enjoying life

Recreation, hobbies, play, personal growth, learning, being productive

What brings you the most enjoyment or pleasure?

Taking walks with my dog, going to baseball games

Functioning

Taking care of yourself, being independent, not having to depend on others

When taking care of yourself, what is most important to you now?

Being able to walk, not being dependent on others

Managing health

Quality and length of life, mind and body health, managing pain and fatigue

What do you hope your health care can do for you?

Allow me to live by myself as long as possible

What matters most: Your turn

Write your answers, OR just say them.

Connecting

Family, friends, spirituality/religion, community

Which relationships or connections are most important to you?

Enjoying life

Recreation, hobbies, play, personal growth, learning, being productive

What brings you the most enjoyment or pleasure?

Functioning

Taking care of yourself, being independent, not having to depend on others

When taking care of yourself, what is most important to you now?

Managing health

Quality and length of life, mind and body health, managing pain and fatigue

What do you hope your health care can do for you?

Step 2

Doing what matters

In this step, you will:

- **Set** meaningful health goals
- **Discuss** how your health or healthcare helps or gets in the way of those goals

Meaningful health goals....

...are anything that you hope to achieve through your health care.



Doing what matters

Meaningful health goals are:

- **Based on values:** What matters to *you*.
- **Realistic:** Something you are able to do, keeping in mind your current health.
- **Specific:** Includes exactly what to do.
- **Flexible:** Can be changed over time as needed.

Doing What Matters

Look back at *what matters most* to you on p. 7.

Discuss:

- What activities do you want to be able to do that reflect what is important to you? How has this been going lately?
- What would you want to be doing more of? Have you been doing it lately?

Check:

- Is the activity specific?
- Is the activity realistic?



Set specific goals

Dave's example

Manage arthritis enough to be able to walk my dog at least 10 minutes a day

Your Specific, Realistic Goals:

A.

B.

How does your health get in the way of those goals?

Your Healthcare

Your healthcare should help you reach your goals. For example, a medicine might help you have more energy to do the things that are important to you.

What parts of your healthcare are helping you meet your goals?

Medicine:

Self-care tasks (like diet):

Blood tests, X-rays:

Medical visits:

Is your health care helping you meet YOUR goals?

We ALSO want to know what is not going well in your healthcare, including things that don't help you meet your goals, things you are unable to do, or things that cause problems. For example, a medicine may have bad side effects, you may not be able to check your blood sugar, or you may feel you have too many tests.

What about your healthcare is making it difficult to meet your goals? Or doesn't fit your priorities?

Medicine:

Self-care tasks (like diet):

Blood tests, X-rays:

Medical visits:

Step 3

Understanding health tradeoffs

In this step, you will:

- **Communicate** the benefits and burdens of your healthcare.
- **Discuss** what you are willing and able to do to meet your goals.
-



The benefits and burdens of health care

When you have more than one health problem:

- Certain health care activities (like taking medicines) may make some things better while making others worse. This is called a tradeoff.
- Your health care team may not understand how burdensome certain activities are, or which of your health goals are most important for you.
- Are any treatments more burden than benefit for you?
- Think about the future: What do you think your health will look like in the next year?



You decide which tradeoffs make sense
in your life!

Making tradeoffs you can live with

Your tradeoffs

What are you willing and able to do?

(Examples: adding medications, scheduling more medical appointments, trying new treatments)

Dave's example:

- A. I'm willing and able to: Take a water pill that makes me have to use the bathroom more often.
- B. I'm willing and able to: Stick to my prescribed diet.
- C. Things I'm unable to do/cause problems/not helpful: Using insulin for diabetes causes problems because of the shots.

A. I'm willing and able to: _____

B. I'm willing and able to: _____

C. Things I'm unable to do/cause problems/not helpful:

Step 4

Talking With Your Health Care Team

In this session, you will:

- **Discuss** the importance of letting your health care team know your goals and health care preferences.
- **Learn** tips for communicating with your health care team.
- **Create** a Health Priorities Summary sheet to bring to your health care team.



Why is communication important?

- Good communication can help you and your health care team make the best plan for your health care.
- Of course, communication is a two-way street, but the more you communicate with your health care team, the better they will be able to align your care with what is most important to you.



After your medical visits, share the discussion about your goals and your health care plan with your family.

Working with your health care team

Talk openly:

- Let your health care team know your goals and health care preferences.
- What help do you need from your team to meet your goals?

Communication Tips

- Ask questions. When your health care team discusses treatment options, ask how the treatments could affect your health goals.
- Voice your preferences. Tell them what you are able to do and what you think is helping; and what is not helping or is bothersome.
- Be specific. For example, instead of saying “I don’t like this medicine,” Say: “This medicine makes me feel weak and dizzy.”

Dave's Example Summary

Bring this sheet to your next appointment to start the conversation about your goals and preferences.

Health Goals: What you want to be able to do

From page 12

Manage arthritis enough to be able to walk my dog at least 10 minutes a day

Health Care Preferences and Tradeoffs

From pages 13 and 16

The one thing about my healthcare I most want to focus on is:

Improving my arthritis so that I can : walk my dog every day.
more easily.

Things I'm willing and able to do for my health:

Trying different medications, exercising more

Things I am unable to do/causes problems/not helpful:

Taking insulin shots causes problems because they hurt

Your Summary of Health Priorities

Bring this sheet to your next appointment to start the conversation about your goals and preferences.

Health Goals: What you want to be able to do

From page 12

Health Care Preferences and Tradeoffs

From pages 13 and 16

The one thing about my healthcare I most want to focus on is:

_____ so that I can do more of: _____ more often or more easily.

Things I'm willing and able to do for my health:

Things I am unable to do/causes problems/not helpful:

Tips for Talking with Your Healthcare Team

Example language to use:

- Now that you understand what's important to me, can we work on a solution that would allow me to...
- I really don't like...
- What concerns me most is...
- My main priority is making sure I can _____.
- Even if it's uncomfortable, I'm willing to _____ if it helps me _____
- I'm willing to _____ if it helps me meet my goals.

Step 5

Adapting to changes in your life and health

In this step, you will:

- **Discuss** any recent or upcoming changes in your life or health.
- **Think about** how your life and health goals may have changed
- **Create** an updated Health Priorities summary.



Adapting to changes

Recent or upcoming changes in my life or health:

Example: Dave had a minor stroke last month.

When you experience changes in your life or health, it's important to recognize that:

- What is most important to you may change.
- Some health goals may become less realistic, and may need to be changed.
- The health care activities you and your loved ones are willing and able to do may change.

Adapting to changes in your life

What is most important in your life

How have changes affected the areas of life that matter most to you?

Dave's Example: *My stroke made it hard to walk my dog.*

Health goals

Have these changes influenced your health goals? If a goal is no longer realistic, how can you change it?

Dave's Example: *I can play fetch with my dog instead of taking her for a walk.*

Health care preferences

Are you working so hard to achieve a goal that doesn't feel worth it?
Have the activities that you are willing and able to do changed?

Dave's Example: *I am willing and able to do physical therapy so I can walk my dog better.*

