remote acp tips, ideas, and templates

general tips

Just like in-person Advance Care Planning (ACP) conversations, remote ACP should be:

- *Individualized* honoring the person's current health;
- *Informative* with opportunities for teach-back;
- *Engaging* with active participation from the individual;
- *Safe* to explore sensitive topics.

Already-learned skills and techniques (such as exploring, clarifying, summarizing, empathizing, and reaffirming purpose) are perhaps more critical when providing remote ACP, as they ensure clear and trusted communication. Additionally, keep in mind the following:

politeness When engaging remotely, others may not be able to intuit humor or other communications. So, it's important to be extraordinarily polite. Being on time, assuming the best of others, and clearly apologizing for an error can help to build up trust and comfort, even as you are disconnected by space (or time).

patience Having more patience than usual is the norm for remote relationship-building. That means waiting longer for replies while in discussion (count to 10 silently) or in scheduling (set-up response expectations); recognizing that the environment might be interrupted (kids or animals interjecting, background noise, and immediate need to "jump off"); or realizing that conversations may not go as planned (getting off-track, being more in-depth or emotional).

persistence With remote conversations, when something doesn't work properly it can create a sense of fear and urgency. It's very likely that when supporting ACP remotely, you will have to trouble-shoot technology, miss words or phrases dropped when the connection goes out, or have difficulty connecting in the first place. Keep working on solutions and best practices for smooth ACP. is also applies to engaging the conversations and moving it forward.

presence To created trusted bonds, your (virtual) presence is important. After scheduling remote sessions, ensure there is a personalized pre-appointment reminder as well as a post-session follow-up. During the conversation, it is important for the other person to feel your presence through high interest in their discussion; it's also important to check-in more frequently, both with summaries and/or teach-backs to guarantee clear communication on both sides of the remote connection.

Each organization needs to evaluate privacy and confidentiality concerns in providing remote ACP.

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Other tips to remember:
- *Know the technology.* Different platforms and engagement have varying levels of safety and security. Evaluate the risk. For example, many web meetings can be joined if someone has the link and may troll events.
- *Practice the technology.* If it's your first time utilizing a web platform or technology, do practice runs to become familiar with the specific logistics. If possible, run a dress rehearsal with a small group willing to provide constructive feedback.
- *Don't only rely on the technology.* ACP conversations are helpful because they provide meaningful human communication. Technology should aid the communication but not replace it. Plus, technology can fail, so have a back-up plan for any conversations or events planned.
- *Trust yourself.* With engage listening and presence, trust your instincts. You've been trained to have these conversations and lead events; while the delivery may be different, your expertise is still reliable and valid.

ideas and templates
Providing the option of remote ACP is truly person-centered, as it engages them in a way most comfortable to them. The following are some ideas and templates for various remote ACP.

snail mail
Suggest topics for letters that people can write to others or to their future selves.

Template
One of the most meaningful ways to share with loved ones is to write a letter outlining the roles you'd like each to play at your end of life. You can tie people's talents to how they can help. Or you can write to your future self; like a mini time-capsule, you can review what you've written in a couple of weeks before completing your advance directive.

telephone
Do a First Steps® conversation – whether all at once or over multiple calls. Have quick touch-base calls using Foolproof questions (or something similar) to build a portfolio of ACP answers over time. Utilize a conference call option to collect multiple family members to participate in a conversation or facilitate sharing decisions.

Template
Sometimes it can be difficult to have deep conversations when you cannot see the other person. I am going to rely on you to interrupt me whenever you need – to add something, correct me, or revisit a topic.

I will check-in frequently to make sure the conversation is going well. If you need a break – whether quick or to continue at a later time – feel free to speak up. This is your time and I want to honor that. Agreed?

email

Prompt questions to consider or answer general questions.
Provide links to ACP forms, websites, or videos. Support other remote methods, such as scheduling, confirming, following up, or referring.

Template
I'm excited for our phone call tomorrow about advance care planning! I'll call (XXX) XXX-XXXX at XX:XX am/pm. One thing you can do beforehand is to think about any concerns you have about this kind of planning. I can address those right away. Also, feel free to make a note of questions or ideas you'd like to discuss.

texting

Suggest daily or weekly topics to explore or think about. Provide links to ACP forms, websites, or videos. Support and reinforce ACP decision-making through encouragement and confirmation.

Template
The fact you signed up for ACP texting shows you care about yourself and other people! Congratulations! Today's think is: who do you turn to in times of stress?
Knowing that can help identify who should be your healthcare agent. For more:
https://vimeo.com/263029660.

web platforms

Host virtual live group conversations and/or Q&A on YouTube or Facebook. Do a First Steps conversation via Skype or another video-call service. Host a virtual ACP game, like The Death Deck or Hello!, on Zoom or GoToWebinar.

Template
Hello! Welcome to our group virtual game using The Death Deck. This is how it will work: we'll randomly draw a card from the deck, showing it to you and reading it out loud. We'll allow for a few minutes to write down your answer. Then, we'll ask if anyone wants to share and we can talk about. If you are with someone, you can also remark on if it's the answer you expected to hear from the other person.

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