

- Purpose:**
1. To document FS Facilitator Certification
 2. To document renewal of FS Facilitator Certification
 3. To monitor fidelity

Date: _____

Facilitator Name: _____

Instructor/Observer: _____

- Conversation Guide Used:**
- FS for Adults who have not planned (green)
 - FS for Adults with Chronic Illness and not planned (blue)

Directions: Use the appropriate FS Conversation Guide as you are recording your observations. Provide specific examples to increase learning. Use “M.O.” for missed opportunity and record examples. Use “N/A” when questions are not appropriate.

Did the Facilitator:	Met	M.O.	N/A	Examples
Explore fears or concerns about advance care planning				
Clarify ACP and/or AD <ul style="list-style-type: none"> • Provide information • Use Teach Back to assess understanding 				
Help individual choose a healthcare agent (IF agent is not selected) <ul style="list-style-type: none"> • Review the four qualities of a healthcare agent • Provide information on the role of the healthcare agent 				
Explore understanding of healthcare agent role (IF agent is present) <ul style="list-style-type: none"> • Review the four qualities of a healthcare agent • Explore questions 				
Explore understanding of medical condition <ul style="list-style-type: none"> • Provide information if able • Explore questions for physician 				
Explore experiences <ul style="list-style-type: none"> • What was learned • Ask agent, if present, if anything else was learned 				
Explore “living well”				
Explore cultural, or spiritual beliefs				

Explore goals of care scenario <ul style="list-style-type: none"> • Describes scenario as written • Uses teach back to explore understanding • Explores questions • Ask agent, if present, for questions 				
Use education/decision aids (e.g., CPR) <ul style="list-style-type: none"> • Provide information in unbiased manner • Use Teach Back to assess understanding 				
Assist with completing a written AD <ul style="list-style-type: none"> • Explore readiness to complete 				
Summarize and create a follow-up plan <ul style="list-style-type: none"> • When agent is present • When agent is not present 				

Communication Skills: Mark when each skill is observed. Use "M.O." for missed opportunity. Record 2-3 examples. Must demonstrate four of the following

Did the Facilitator:	Met	M.O.	N/A	Notes/Examples
Explore meanings of words/phrases				
Paraphrase/clarify				
Ask, "Anything else?"				
Listen for and summarize themes				
Affirm/reaffirm purpose of conversation				
Verbalize empathy				
Use Ask-Teach-Ask technique				
Remain value-neutral				
Pay attention to non-verbal communication				

Did the Facilitator use the Conversation Guide? Yes No Most of Time
Did the Facilitator ask all questions as written? Yes No Most of Time
Did the Facilitator use critical-thinking skills to respond to questions? Yes No

Give 1-2 examples: _____

FOR INSTRUCTORS as appropriate: Is certification awarded/renewed? Yes No

If no, list the follow-up plan for improvement: _____

