

**QUALITY IMPROVEMENT TOOLKIT  
FOR GENERAL PRACTICE**

**Prevention**

**Advance care  
planning  
MODULE**

# ADVANCE CARE PLANNING

## Introduction

### The Quality Improvement Toolkit

This Quality Improvement (QI) toolkit (the toolkit) is made up of modules that are **designed to support your practice to make easy, measurable and sustainable improvements to provide best practice care for your patients**. The toolkit will help your practice complete QI activities using the Model For Improvement (MFI).

Throughout the modules you will be guided to explore your data to understand more about your patient population and the pathways of care being provided in your practice. Reflections from the module activities and the related data will inform improvement ideas for you to action using the MFI.

The MFI uses the Plan-Do-Study-Act (PDSA) cycle – a tried and tested approach to achieving successful change. It offers the following benefits:

- A simple approach that anyone can apply
- Reduced risk by starting small
- It can be used to help plan, develop and implement change that is highly effective.

The MFI helps you break down your change implementation into manageable pieces, which are then tested to ensure that the change results in measurable improvements and minimal effort is wasted.

There is an advance care planning example using the MFI and a blank template for you to complete at the end of this module.

If you would like additional support in relation to quality improvement in your practice please contact Brisbane South PHN on [optimalcare@bsphn.org.au](mailto:optimalcare@bsphn.org.au)

Due to constant developments in research and health guidelines, the information in this document will need to be updated regularly. Please contact Brisbane South PHN if you have any feedback regarding the content of this document.



This icon indicates that the information relates to the ten Practice Incentive Program Quality Improvement (PIP QI) measures.

### Acknowledgements

We would like to acknowledge that some material contained in this toolkit has been extracted from organisations including the Institute for Healthcare Improvement; the Royal Australian College of General Practitioners (RACGP); the Australian Government Department of Health; Best Practice; Medical Director, CAT4 and Train IT. These organisations retain copyright over their original work and we have abided by licence terms. Referencing of material is provided throughout.

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## **Brisbane South PHN, 2020**

# Contents

ADVANCE CARE PLANNING .....	5
What is Advance care planning (ACP)? .....	5
ACP process .....	5
What are the triggers for ACP? .....	6
What are the benefits of ACP? .....	6
Aim of this Continuous Quality Improvement (CQI) toolkit.....	7
How to use this toolkit? .....	7
Activity 1 – Advance care planning (ACP) .....	8
Aspects of ACP.....	8
Wills and testaments.....	8
Registration with myGov.....	8
Enduring power of attorney .....	8
Statement of choices .....	8
Advance care directives .....	8
Registration with My Aged Care .....	9
Organ donor .....	9
Activity 1.1 – ACP checklist.....	9
Medicare Benefits Schedule (MBS) items and ACP .....	9
Activity 2 – Planning your CQI activity .....	11
Activity 2.1 –CQI checklist.....	11
Activity 3 – Strategies for improving ACP in your practice .....	16
Ideas to increase the number of advance care directives completed in your practice.....	16
Successful teams.....	16
Activity 3.1 – Practice team roles in ACP .....	18
Resources .....	19
Links to other QI toolkits.....	19
For more support.....	19
Model for improvement and PDSA worksheet EXAMPLE.....	21
Step 1: The thinking part - 3 fundamental questions .....	21
Model for improvement and PDSA worksheet EXAMPLE.....	22
Step 2: The doing part - plan, do, study, act.....	22
Model for improvement and PDSA worksheet template .....	24
Step 1: The thinking part - 3 fundamental questions .....	24
Model for improvement and PDSA worksheet template .....	25
Step 2: The doing part - plan, do, study, act cycle .....	25

# ADVANCE CARE PLANNING

## What is Advance care planning (ACP)?

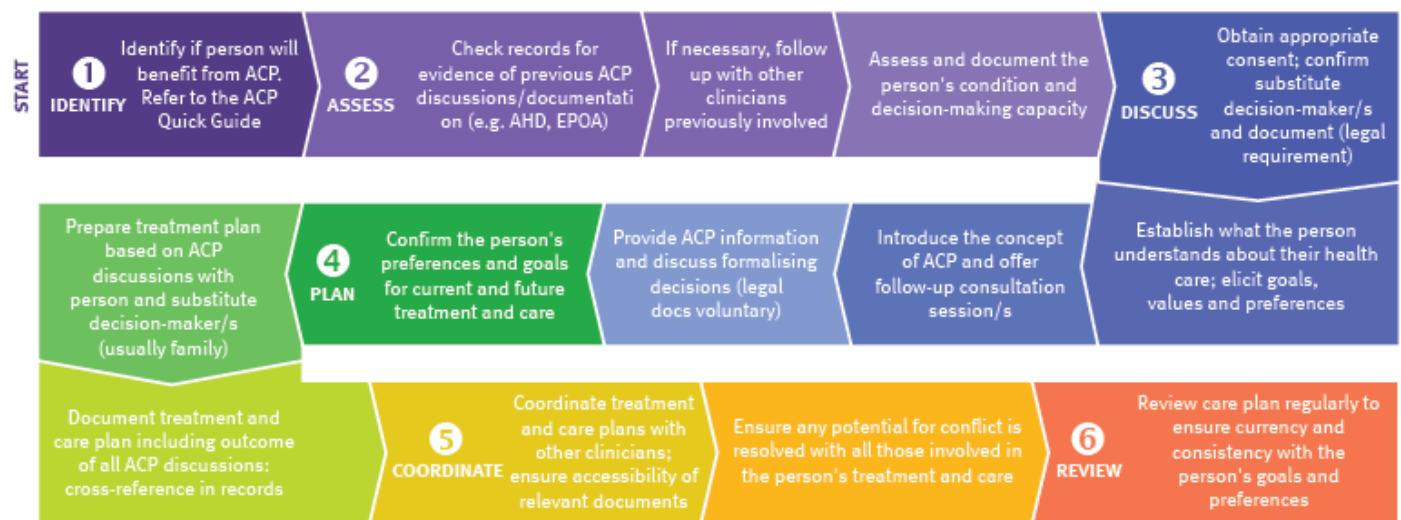
Advance care planning (ACP) is a person-centred approach for planning current and future health and personal care that reflects the person’s values, beliefs and preferences. The ACP process is collaborative and coordinated. It aims to develop an understanding of the person’s treatment and care goals in order to assist health professionals to better meet their needs.

Effective ACP involves ongoing communication between the person, those closest to them, and a multidisciplinary health care team to optimise the person’s current treatment, care, and quality of life. ACP can be carried out at any time and will be driven by the person’s care needs and their willingness to participate.

ACP is an iterative process and should be integrated into clinical practice and routine care. ACP plans should be reviewed regularly to ensure plans remain consistent with the person’s values, beliefs and preferences for health and personal care.

## ACP process

ACP is an accepted process and can commence at any stage. Repeat stages as required. Carefully document to ensure all clinicians can access patient information.



1

<sup>1</sup> [https://www.health.qld.gov.au/\\_\\_data/assets/pdf\\_file/0031/688261/acp-process.pdf](https://www.health.qld.gov.au/__data/assets/pdf_file/0031/688261/acp-process.pdf)

## What are the triggers for ACP?

Serious illness or injury can happen to anyone, so it is recommended that everyone has an advance care directive. Making an advance care directive, and discussing it with loved ones and doctors can offer everyone peace of mind. Planning is particularly important in several scenarios. Triggers for ACP can include if a person:

- raises ACP with a member of the general practice team
- has an advanced chronic illness (for example: chronic obstructive pulmonary disease (COPD) or heart failure)
- has a life limiting illness (for example: dementia or advanced cancer)
- is aged 75 years or older, or 55 years or older if they are an Aboriginal and/or Torres Strait Islander person
- is a resident of, or is about to enter, an aged care facility or is at risk of losing competence (for example: has early dementia)
- has a new significant diagnosis (for example: metastatic disease or transient ischemic attack)
- is at a key point in their illness trajectory (for example: recent or repeated hospitalisation, or commenced on home oxygen)
- does not have anyone (such as a family, caregiver or friend) who could act as substitute decision-maker
- may anticipate decision-making conflict about their future health care
- if the person has a carer.<sup>2</sup>

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*A person does not have to be ill to start advance care planning. Healthy people are encouraged to think about their health and care preferences and discuss them with their family, friends, carer and/or health care team.*

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## What are the benefits of ACP?

ACP benefits everyone: the person, their family, carers, health professionals and associated organisations.

- It helps to ensure people receive the care they actually want.
- It improves ongoing and endoflife care, along with personal and family satisfaction.
- Families of people who have an ACP have less anxiety, depression, stress and are more satisfied with care.
- For health care professionals and organisations, it reduces unnecessary transfers to acute care and unwanted treatment.<sup>3</sup>

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<sup>2</sup> <https://www.advancecareplanning.org.au/for-health-and-care-workers>

<sup>3</sup> <https://www.advancecareplanning.org.au/for-family-friends-carers/understanding-advance-care-planning>

## Aim of this Continuous Quality Improvement (CQI) toolkit

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*Toolkit aim - To increase the number of advance care directives completed with patients to ensure their end of life preferences are document and respected*

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The following checklists and activities will help guide you to achieve the toolkit aim and allow you to work through the process at your own pace. The toolkit is designed to assist practices to meet the PIP QI incentive

### How to use this toolkit?

There are checklists included below that will guide you and your practice in assisting patients to meet their ACP needs. This includes how to:

- use this toolkit
- identify a sample group of patients (between 50-100 patients)
- set yourselves timelines to achieve your goals
- consider potential internal or external factors that could impact the ACP process and factor these into your planning e.g. accreditation preparation, staff leave (planned or unplanned), global pandemic, influenza vaccination season
- review your progress regularly
- evaluate if your process is working. If you are not seeing improvements, then review your process and start again.

## Activity 1 – Advance care planning (ACP)

### Aspects of ACP

There are a number of aspects to consider when discussing end of life care with patients. These include:

#### Wills and testaments

A will is a legal document that says what individuals would like to happen with their money, belongings and other assets when they pass away. The will outlines to whom people want to give their estate and who they would like to administer the estate when they pass away.

The Public Trustee of Queensland provides a free [will-making service](#) to all Queenslanders.

#### Registration with myGov

myGov is a secure way to access government services online with one login and one password. Some of the services people can link to their [myGov account](#) include:

- Australian Taxation Office
- Centrelink
- Department of Veterans' Affairs
- Medicare
- My Aged Care
- My Health Record
- National Disability Insurance Scheme.

#### Enduring power of attorney

An enduring power of attorney is a formal document giving one person the authority to make personal and/or financial decisions on another person's behalf. Personal decisions relate to an individual's care and welfare, including health care. Financial decisions relate to the management of finances (e.g. paying bills and taxes, selling or renting the home, using income to pay for an individual's needs or invest their money).

Individuals can complete an [enduring power of attorney form](#) at any stage.

#### Statement of choices

The statement of choices allows a person to record their personal values and preferences for health care, which assists family and health care professionals to decide on medical care when that person is unable to make or communicate decisions. There is a form for those who have decision-making capacity ([Form A](#)), and those without decision-making capacity ([Form B](#)).

#### Advance care directives

[Advance care directives are a set of directives](#) stating an individual's wishes for the future health care of their various medical conditions. These directives come into effect only if a person is unable to make their own decisions.



## Registration with My Aged Care

[My Aged Care](#) is the main entry point to the aged care system in Australia. My Aged Care aims to make it easier for older people, their families, and carers to access information on ageing and aged care, have their needs assessed, and be supported to find and access services.

My Aged Care is a service available for:

- help at home
- short term care in an aged care facility (respite)
- permanent placement at an aged care facility.

## Organ donor

Individuals can list their decision to donate organs and tissues for transplants. Read more about organ donation on the [DonateLife](#) website.

## Activity 1.1 – ACP checklist



*The aim of this activity is to guide the practice to ensure that each patient is informed about all options in relation to advance care planning and how this can be incorporated when completing health assessments and management plan reviews.*

Checklist for ACP	Completed
Does the patient have a will?	<input type="checkbox"/>
Is the patient registered with myGov?	<input type="checkbox"/>
Does the patient have an enduring power of attorney?	<input type="checkbox"/>
Has the patient completed a statement of choices?	<input type="checkbox"/>
Does the patient have an advance care directive?	<input type="checkbox"/>
Is the patient registered with My Aged Care?	<input type="checkbox"/>
Has the patient considered being an organ donor?	<input type="checkbox"/>
Has the patient or carer provided copies of ACP documentation to the <a href="#">Office of Advance Care Planning</a> ?	<input type="checkbox"/>

## Medicare Benefits Schedule (MBS) items and ACP

Discussing ACP may be incorporated when completing specific health assessments and chronic disease management plans. These are dependent on patient age, ethnicity and co-morbidities. Conditions apply to each item number. Please ensure the GP understands these prior to claiming the item number/s.

*Please note:* Brisbane South PHN has a comprehensive toolkit looking at [MBS items](#).


MBS item	Completed
<ul style="list-style-type: none"> <li><a href="#">GP management plan</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">Team care arrangements</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">GPMP/TCA review x 3 times per year</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">Nurse chronic disease item number</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">Health assessment</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">Aboriginal and Torres Strait Islander health assessment</a></li> </ul>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li><a href="#">Home medication review</a></li> </ul>	<input type="checkbox"/>




Reflection on **Activity 1.1:**



<b>Practice name:</b>	<b>Date:</b>
<b>Team member:</b>	



## Activity 2 – Planning your CQI activity



### Activity 2.1 –CQI checklist

 The aim of this activity is to work through the suggested steps to support the successful implementation of advance care planning.

Stage	Steps	Details	Completed
Plan your activity	Arrange a practice meeting for practice team members to discuss a potential focus group of patients for advance care planning.	<p>CQI activity could be added as a standing agenda item on your usual team meetings; OR Form a CQI team within your practice and schedule meetings to discuss options and strategies.</p> <p> <i>TIP: To meet <a href="#">PIP QI requirements</a>, you must undertake CQI as a team.</i></p> <p><a href="#">Refer to the practice meeting template.</a></p>	<input type="checkbox"/>
	Identify and establish key practice team members to implement this CQI activity.	<p>Suggested team members include:</p> <ol style="list-style-type: none"> <li>1. General practitioner (GP)</li> <li>2. Practice manager</li> <li>3. Practice nurse</li> <li>4. Receptionist</li> </ol> <p>Refer to the <a href="#">practice team</a> roles and responsibility for ideas.</p> <p> <i>TIP: Specify roles and delegate responsibilities for each team member and ensure these are documented in the PDSA.</i></p>	<input type="checkbox"/>
	Identify who will be the CQI Lead at your practice.	<p>Who is this person? _____</p> <p>Do they understand their role?</p> <p><input type="checkbox"/> Yes                      <input type="checkbox"/> No</p> <p> <i>TIP: The CQI Lead provides day to day leadership to support ongoing activity, maintain progress, delegate tasks and ensure CQI processes are embedded into routine over time.</i></p>	<input type="checkbox"/>

Stage	Steps	Details	Completed
	<p>Conduct searches on CAT4 to identify an appropriate sample group of patients to focus on. <i>(You may wish to conduct your searches prior to holding a practice meeting).</i></p>	<p>Practices may focus on any QI area that is informed by your clinical information system data that meet the needs of your practice population.</p> <p>Alternatively, the following recipes can be used as a guide to assist practices in identifying achievable QI activities.</p> <ul style="list-style-type: none"> <li>• <a href="#">Identify patients aged 60+ years with two or more chronic conditions</a></li> <li>• <a href="#">Identify patients at high risk of dementia</a></li> <li>• <a href="#">Identify patients with diabetes, CVD, or CKD who have never had a GPMP/TCA claimed</a></li> <li>• <a href="#">Identify patients eligible for an annual 75+ health assessment</a></li> <li>• <a href="#">Identify patients eligible for an Aboriginal or Torres Strait Islander health assessment</a></li> </ul> <p> <i>TIP: You may have already identified your sample group of patients from previously prepared CAT4 recipe reports.</i></p> <p><i>TIP: Reviewing and analysing data is a <a href="#">PIP QI requirement</a>.</i></p>	<input type="checkbox"/>
	<p>Confirm sample group of patients.</p>	<p>Identify your patients. It is suggested that you start with 50 -100 patients initially.</p> <p> <i>TIP: You need to generate a list with individual names who are identified as most appropriate for discussing advance care planning.</i></p>	<input type="checkbox"/>

Stage	Steps	Details	Completed
	<p>Discuss and document your practice approach, targets and expected outcomes as a result of completing your CQI activity.</p> <p>PDSA examples are available in each <a href="#">QI toolkit</a>.</p>	<p>Document agreed strategies, actions, baseline data, timeframes and targets in PDSA template.</p> <p> <i>TIP: Consider potential factors that may negatively impact the activity and factor these into timelines. (e.g. accreditation, staff leave, global pandemic, influenza vaccination season).</i></p> <p>Refer to the <a href="#">PDSA blank template</a>.</p> <p>Use the PDSA example below as a guide:</p> <ul style="list-style-type: none"> <li>• <a href="#">increase the number of patients with advance care directives</a></li> </ul> <p> <i>TIP: Completing a PDSA template will form <b>part</b> of the evidence that is required to ensure your practice meets the criteria and is eligible for the <a href="#">PIP QI payment</a>.</i></p> <p><i>TIP: Refer to <a href="#">ideas to increase the number of Advance Care Directives completed in your practice</a>.</i></p>	<p><input type="checkbox"/></p>
	<p>Upskill practice team members (if required).</p>	<p>Ensure all relevant team members understand what an advance care directive is. Refer to <a href="#">training modules</a>, <a href="#">health professional resources</a> or information on <a href="#">beginning the conversation</a> as required.</p>	<p><input type="checkbox"/></p>
	<p>Identify and order any resources or publications required.</p>	<p>Refer to the list of <a href="#">resources</a> available from Advance Care Planning Australia.</p>	<p><input type="checkbox"/></p>
<i>Implement your activity</i>	<p>Communicate details of the focused CQI activity to the whole practice team.</p>	<p>Share the updated PDSA with the whole practice team to ensure everyone is aware and knows their role to support implementation of the activity.</p>	<p><input type="checkbox"/></p>
	<p>Hold meetings and document minutes and outcomes as you progress through the activity.</p>	<p>Holding regular meetings will help the practice maintain momentum and keep people on task to achieve CQI targets.</p> <p><i>TIPS:</i></p>	<p><input type="checkbox"/></p>

Stage	Steps	Details	Completed
		<ul style="list-style-type: none"> <li>Minutes of meetings form part of the PIP QI documentation</li> <li>a PDSA can be edited and updated as you progress the activity.</li> <li>Plan meetings in advance to ensure availability of key members.</li> </ul> 	
	Contact Brisbane South PHN Optimal care team for support (if required).	Brisbane South PHN Optimal care team can assist your practice to achieve its activity goals. Contact the team on <a href="mailto:optimalcare@bsphn.org.au">optimalcare@bsphn.org.au</a> to assist with using data extraction tools, suggest CQI strategies and tips.	<input type="checkbox"/>
Review your activity	Review PDSA and targets to assess progress or success.	<p>You may wish to duplicate your data search on CAT4 to assist you to report on any improvements.</p> <p>Consider:</p> <ul style="list-style-type: none"> <li>What worked?</li> <li>What needs more work?</li> <li>What did you learn on the way?</li> <li>What have you updated or changed to support this activity?</li> </ul> <p>TIPS:</p> <ul style="list-style-type: none"> <li>Conducting a review of your process and data forms part of the requirements for PIP QI.</li> <li>Ensure you document your findings to continue to meet the <a href="#">PIP QI guidelines</a>.</li> <li>If you have changed your systems and processes ensure these are documented in your practice policy &amp; procedure manual.</li> </ul> 	<input type="checkbox"/>
	If outcome not achieved.	Review CQI plan and propose a new strategy.	<input type="checkbox"/>
	Hold a whole of practice meeting.	Communicating the results of your QI activity with your whole team is important.	<input type="checkbox"/>

Stage	Steps	Details	Completed
	Completion is a success whether outcome is achieved or not.	Celebrate all achievements, big or small.  Use learnings to inform your next activity or repeat this one with a different plan.	<input type="checkbox"/>
<i>Next steps</i>	Determine if this activity needs to continue as is, or requires changes.	If you have achieved your outcomes, ensure this activity continues within your usual processes.  Consider options for a new activity.	<input type="checkbox"/>

Reflection on **Activity 2.1:**

<b>Practice name:</b>	<b>Date:</b>
<b>Team member:</b>	

## Activity 3 – Strategies for improving ACP in your practice

### Ideas to increase the number of advance care directives completed in your practice

When you meet with your practice team, it is suggested that you discuss how your practice can initiate conversations and increase the number of advance care directives completed for patients. You may consider the following strategies:

- Ensure ACP is included in all health assessments including Aboriginal and Torres Strait Islander, 45-49-year-old and 75+ year old
- Include ACP as part of the GP Management Plan and review templates
- Conduct a search on CAT4 or Practice Sense to identify patients with a chronic condition and send them a letter about ACP
- Identify an area of care where advance health directive conversations can be initiated while patients are in the treatment room with the nurse (e.g. completing an ECG, wound care, immunisations)
- Set up a display table in your practice waiting room with resources and information about end of life care
- Ensure your practice website has a link to up to date ACP forms
- Put a note on clinical teams monitor reminding them to talk to patients about ACP
- Include information in the practice newsletter and social media about ACP
- Ensure relevant team members attend an education session on ACP.

### Successful teams

Engaged and effective practice teams are the foundations for achieving sustainable improvements.

To achieve sustainable improvement, consider how your team currently operates. Is your team working together effectively and efficiently? Improving PIP QI measures requires a whole of team approach.

Documented role clarity is important to ensure efficiency and accountability. Below is an example of how responsibilities could be shared across the team. As there is a great deal of diversity between practices, consider what will work best for your team.

#### General Practitioners (GP)

- Respond to recall/reminder systems and engage in opportunistic discussions to encourage participation with eligible patients
- Perform a clinical review on each patient
- Support eligible patients to finalise advance care documentation, including addressing potential barriers (e.g. lack of knowledge, access etc)
- Maintain RACGP Standards for General Practice - Criterion GP2.2 - Follow up systems



#### Practice Nurses



- Work with reception staff to promote end of life care
- Respond to recall/reminder systems and engage in opportunistic discussions to encourage participation with eligible patients
- Initiate conversations with patients in relation to advance care planning documentation.



**Practice Manager**

- Maintain up to date patient registers
- Establish and oversee recall/reminder systems
- Support GPs with the flow of information in relation to PIP QI
- Support/manage reception staff responsibilities
- Manage succession planning
- Document policies and procedures
- Monitor progress against PIP QI improvement measures



**Reception Staff**

- Order and maintain supplies of resources, ensuring information is available in multiple languages
- Display brochures, flyers, posters and statement of choices forms
- Respond to recall/reminders opportunistically when a patient phones for an appointment and/or by handing relevant resources to patients in the waiting area
- Send GP signed recall/reminder letters (and/or text messages and phone calls) to eligible patients to encourage participation.







**Medical and Nursing students (if relevant)**

- Consider any of the above tasks that Medical and Nursing students may be able to complete and delegate. Ensure training is provided.

### Activity 3.1 – Practice team roles in ACP



Based on the example above, identify the person responsible for each part of the process required to increase the number of advance care directives completed. Document each person’s responsibilities in the table below.

Tasks for (insert QI Activity Name)		
	Name	Responsibilities
<p><b>GP</b></p> 		
<p><b>Practice Nurse</b></p> 		
<p><b>Practice Manager</b></p> 		
<p><b>Receptionist</b></p> 		

**Reflection on Activity 3.1:**

<b>Practice name:</b>	<b>Date:</b>
<b>Team member:</b>	

## Resources

- RACGP – [Advance care planning](#)
- Queensland Government – [Advance health directive](#)
- Office of Advance Care Planning – [Improving end of life care](#)
- Advance health directive [forms](#)
- [Advanced Care Planning Australia](#)
- [The Advance Project](#)
- Training modules: [Office of Advance Care Planning](#) OR [The Advance Project](#) OR [Palliative Care online training](#)
- [Statement of choices form](#)

## Links to other QI toolkits

Brisbane South PHN have a suite of QI toolkits available for general practice. The toolkits are designed to:

- improve patient care and outcomes
- generate increased revenue for GPs
- help practices fulfil their quality improvement requirements under PIP QI
- each be completed at your own pace
- be available so that you choose your own adventure – you choose which topic/toolkit you would like to work on.

After completing this Toolkit, you may benefit from choosing one of the following:

- [Quality patient records QI toolkit](#) – this toolkit assists you to review your practice data to ensure your patient records are maintained at the highest quality. It also includes activities to ensure your practice is meeting the e-health PIP criteria and another activity on PRODA.
- [MBS items](#) – this toolkit assists you to review your practice's use of MBS item numbers. You can also generate reports to identify the number of eligible patient's vs the number of MBS item numbers claimed.
- [Older people population](#) - this toolkit is designed to assist you to manage your older patient population. Key topics include health assessments (75+ and Aboriginal and Torres Strait Islander), medication reviews (via a Home Medication Review), management plans (for patients with a chronic medical condition), advance care planning, dementia screening, falls prevention, vaccinations including influenza, pneumococcal and shingles, smoking, alcohol & physical activity, osteoporosis and cancer screening.

The full [suite of toolkits](#) is available on Brisbane South PHN's website.

## For more support

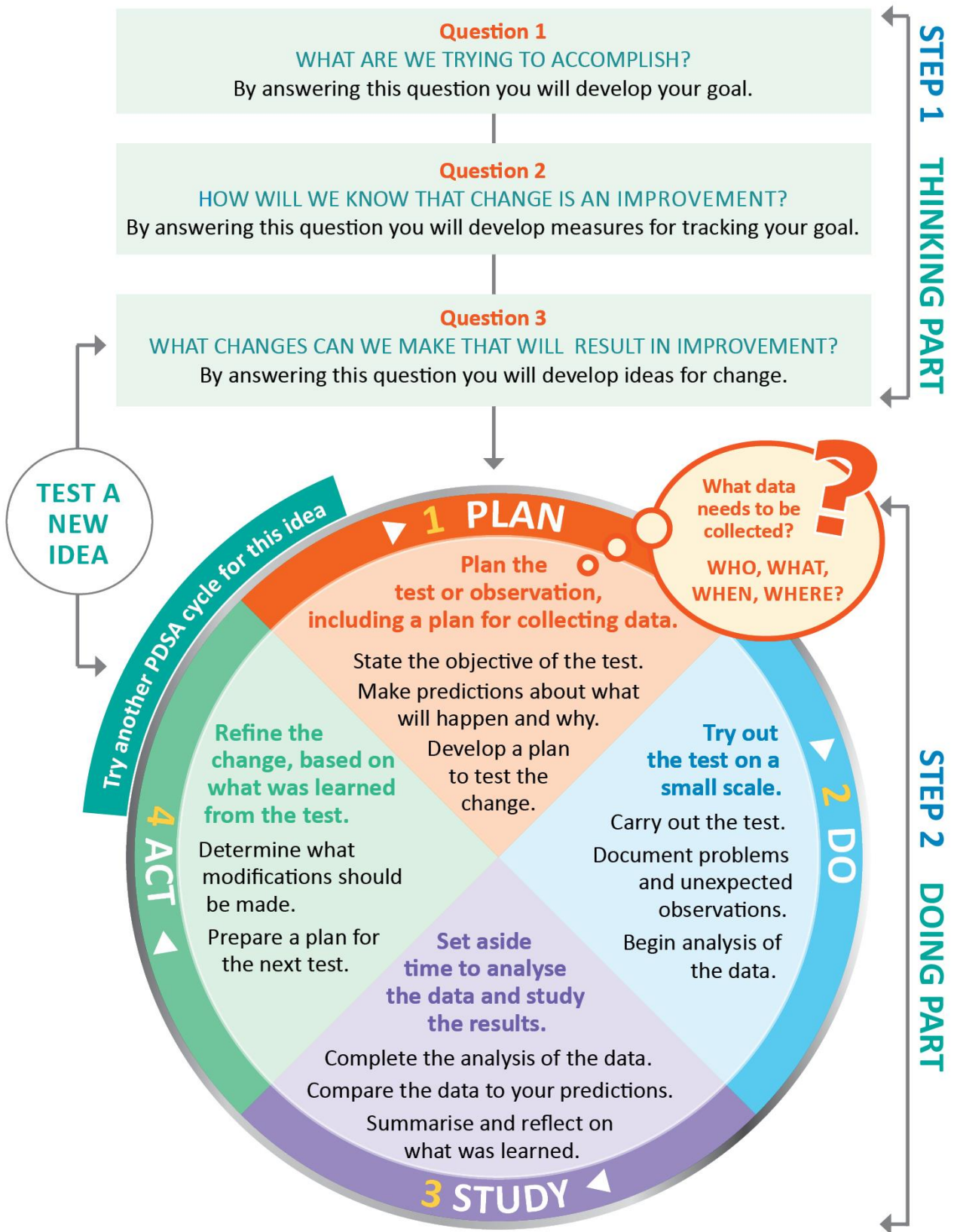


[optimalcare@bsphn.org.au](mailto:optimalcare@bsphn.org.au)



1300 467 265

# The model for improvement diagram



Source: <http://www.ihi.org/resources/Pages/HowtoImprove/ScienceofImprovementTestingChanges.aspx>

## Model for improvement and PDSA worksheet EXAMPLE

### Step 1: The thinking part - 3 fundamental questions

<b>Practice name:</b>	<b>Date:</b>
<b>Team member:</b>	
<b>Q1. What are we trying to accomplish? (Goal)</b>	
<b>By answering this question, you will develop your GOAL for improvement.</b>	
<p><i>Our goal is to:</i>            Increase the number of people with advance care planning documentation completed.            This is a good start, but how will you measure whether you have achieved this goal? The team will be more likely to embrace change if the goal is a S.M.A.R.T goal: Specific, Measurable, Achievable, Realistic and Time bound.            So, for this example, a better goal statement would be:  <i>Our S.M.A.R.T. goal is to:</i>            Increase the number of ACP documents completed for patients having a 75+ health assessment by 15% by 31 December.</p>	
<b>Q2. How will you know that a change is an improvement? (Measure)</b>	
<p>By answering this question, you will develop MEASURES to track the achievement of your goal.            E.g. Track baseline measurement and compare results at the end of the improvement.</p> <p>We will measure the percentage of ACP documents completed on patients aged 75+ who have had a health assessment completed. To do this we will:</p> <ul style="list-style-type: none"> <li>A) Identify the number of active patients aged 75+ years with a health assessment</li> <li>B) Identify the number of active patients aged 75+ years with a health assessment who have advance care directives completed.</li> </ul> <p>B divided by A x 100 produces the percentage of patients 75+ with a health assessment and advance care directives completed</p>	
<b>Q3. What changes could we make that will lead to an improvement? (List your IDEAS)</b>	
<p>By answering this question, you will develop the IDEAS that you can test to achieve your CHANGE goal.            You may wish to BRAINSTORM ideas with members of our practice team.</p> <p>Our ideas for change:</p> <ol style="list-style-type: none"> <li>1. Identify patients 75+ eligible for a health assessment on CAT4. Contact these patients via letter, phone, SMS etc. to encourage participation in the health assessment and ACP.</li> <li>2. Ensure all relevant team members have received training on ACP.</li> <li>3. Have the clinical team discuss how they can encourage opportunistic discussions.</li> <li>4. Add ACP to templates for chronic disease management and health assessments.</li> <li>5. Source and provide endorsed patient education resources (in waiting rooms, toilets etc.).</li> <li>6. Run an awareness campaign for ACP.</li> </ol>	

**Note: Each new GOAL (1st Fundamental Question) will require a new Model for Improvement Guide**

Source: Langley, G., Nolan, K., Nolan, T., Norman, C. & Provost, L. 1996, *The Improvement Guide*, Jossey-Bass, San Francisco, USA.

## Model for improvement and PDSA worksheet EXAMPLE

### Step 2: The doing part - plan, do, study, act

You will have noted your IDEAS for testing when you answered the third fundamental question in step 1. You will use this sheet to test an idea.

PLAN	Describe the brainstorm idea you are planning to work on. <span style="float: right;">(Idea)</span>
Plan the test, including a plan for collecting data.	What exactly will you do? Include what, who, when, where, predictions and the data to be collected.
<p><b>Idea:</b> Increase the number of ACP documents completed for patients having a 75+ health assessment by 15% by 31 December.</p> <p><b>What:</b> Mary will conduct a search on CAT4 and identify active patients aged 75+ eligible for an annual health assessment.</p> <p><b>Who:</b> Mary (receptionist).</p> <p><b>When:</b> Begin 30 October.</p> <p><b>Prediction:</b> 20% of patients aged 75+ will have an active advance health directive.</p> <p><b>Data to be collected:</b> Number of active patients aged 75+ with a health assessment and advance health directive completed and the number of active patients aged 75+ eligible for a health assessment.</p>	
DO	Who is going to do what? <span style="float: right;">(Action)</span>
Run the test on a small scale.	How will you measure the outcome of your change?
<p>To measure the outcome of the change, we will compare the percentage increase of the number of active patients with advance care directives completed at the start of the test against the number of active patients with advance care directives completed once the test is completed.</p>	
STUDY	Does the data show a change? <span style="float: right;">(Reflection)</span>
Analyse the results and compare them to your predictions.	Was the plan executed successfully? Did you encounter any problems or difficulty?
<p>After completing our initial analysis of patients aged 75+ with health assessment and advance care directive completed only 15% of patients had both completed. This was lower than our prediction of 20%. At the completion of focusing on patient education, our results showed an increase of 22%. This exceeded our goal of 15%.</p> <p>When we discussed advance care planning at our team meeting we identified that some of the GPs and Nurses needed upskilling in this topic. Team members participated in training which provided an opportunity for staff to freely speak to patients about ACP.</p>	
ACT	Do you need to make changes to your original plan? OR Did everything go well? <span style="float: right;">(What next)</span>
Based on what you learned from the test, plan for your next step.	<p>If this idea was successful you may like to implement this change on a larger scale or try something new.</p> <p>If the idea did not meet its overall goal, consider why not and identify what can be done to improve performance.</p>

1. Include ACP training to the orientation checklist for new staff.
2. Include an ACP prompt to health assessment and management plan templates.
3. Remind the **whole** team that this is an area of focus for the practice.

Repeat step 2 for other ideas – What idea will you test next?

## Model for improvement and PDSA worksheet template

### Step 1: The thinking part - 3 fundamental questions

<b>Team member:</b>	
<b>Q1. What are we trying to accomplish?</b>	<b>(Goal)</b>
By answering this question, you will develop your GOAL for improvement.	
<b>Q2. How will you know that a change is an improvement?</b>	<b>(Measure)</b>
By answering this question, you will develop MEASURES to track the achievement of your goal. E.g. Track baseline measurement and compare results at the end of the improvement.	
<b>Q3. What changes could we make that will lead to an improvement?</b>	<b>(List your IDEAS)</b>
By answering this question, you will develop the IDEAS that you can test to achieve your CHANGE goal. You may wish to BRAINSTORM ideas with members of our Practice Team.	
<b>Idea:</b>	
<b>Idea:</b>	
<b>Idea:</b>	
<b>Idea:</b>	

Note: Each new GOAL (1st Fundamental Question) will require a new Model for Improvement plan.

Source: Langley, G., Nolan, K., Nolan, T., Norman, C. & Provost, L. 1996, The Improvement Guide, Jossey-Bass, San Francisco, USA.



## Model for improvement and PDSA worksheet template

### Step 2: The doing part - plan, do, study, act cycle

You will have noted your IDEAS for testing when you answered the third fundamental question in step 1. You will use this sheet to test an idea.

<b>PLAN</b>	<b>Describe the brainstorm idea you are planning to work on.</b> <span style="float: right;"><b>(Idea)</b></span>
Plan the test, including a plan for collecting data.	What exactly will you do? Include what, who, when, where, predictions and the data to be collected.
<b>DO</b>	<b>Who is going to do what?</b> <span style="float: right;"><b>(Action)</b></span>
Run the test on a small scale.	How will you measure the outcome of your change?
<b>STUDY</b>	<b>Does the data show a change?</b> <span style="float: right;"><b>(Reflection)</b></span>
Analyse the results and compare them to your predictions.	Was the plan executed successfully? Did you encounter any problems or difficulty?
<b>ACT</b>	<b>Do you need to make changes to your original plan? OR Did everything go well?</b> <span style="float: right;"><b>(What next)</b></span>
Based on what you learned from the test, plan for your next step.	If this idea was successful you may like to implement this change on a larger scale or try something new. If the idea did not meet its overall goal, consider why not and identify what can be done to improve performance.

**Repeat step 2 for other ideas – What idea will you test next?**

