

# BEST PRACTICES

## for Engaging Patients in your facility with Life Plans



*This document was developed based on feedback shared by dialysis social workers from ESRD Networks 5 and 11 who have successful processes in assisting patients developing Life Plans.*

### **BARRIER:** Patient hesitancy to talk about their hopes and goals

#### **BEST PRACTICES:**

- ✓ Ask open-ended questions about what is important to them and their quality of life.
- ✓ Let patients know these goals can be about health & well-being, relationships, community engagement, travel, career, or spiritual and personal growth.
- ✓ Use motivational interviewing to meet patient where they are.

### **BARRIER:** Patient difficulty setting goals; disinterested or overwhelmed

#### **BEST PRACTICES:**

- ✓ Ask open ended questions to patients about what their goals are and what their life would look like if they didn't have barriers.
- ✓ Reframe patient's statements to goal statements and ask if they agree.
- ✓ Listen to patients and encourage them to think beyond dialysis – "What do you want to improve?" "What do you want to be different in the next year?" "What is important to you right now?" "What did they give up because of dialysis?" "What would make life better for them?" Pick out things they mention during conversation and ask if they'd like to set a specific goal for it. Be creative and open-minded!
- ✓ Family may be able to help identify goals.
- ✓ Provide examples.
- ✓ Results of PHQ-9 or KDQOL may provide a starting point.

### **BARRIER:** Company's care plan document doesn't accommodate patient goals

#### **BEST PRACTICES:**

- ✓ Have patient write goals in comment section or in white-space after signature section.

### **BARRIER:** Patient goal is too big or too challenging for patient to accomplish

#### **BEST PRACTICES:**

- ✓ Accept that the patient goals may not look like what we would expect and may not be anything we consider possible or relevant, but they need to be validated and documented regardless.
- ✓ Assist patient in breaking goals in to smaller, more achievable goals. Celebrate accomplishments.
- ✓ Use SMART goals (specific, measurable, achievable, relevant, and time-bound).
- ✓ Use the MEI Life Options Goal Sheet:  
[https://esrdncc.org/contentassets/4d2ff2b267f94210bb24e8715f71348f/lifeoptions\\_mental-health\\_goalsheet\\_508.pdf](https://esrdncc.org/contentassets/4d2ff2b267f94210bb24e8715f71348f/lifeoptions_mental-health_goalsheet_508.pdf)