

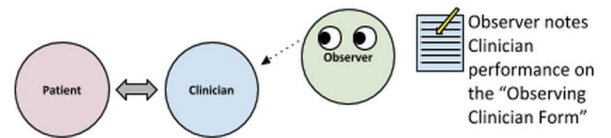
Meta-LARC Serious Illness Conversation Role Play Instructions and Observation Worksheet

GROUND RULES

- Non-judgmental approach
- Confidentiality – what is said in the room, stays in the room
- This is safe place to practice
- Everyone has something to learn
- Feedback is expected and specific
- Timeouts acceptable anytime when you feel distressed or stuck

ROLE PLAY SESSION INSTRUCTIONS

- Form a group of 3.
- Three 20-min role plays (for each role-play, approx. 15 min role play using the Guide then 5 min debrief).
- Each member take one of the following roles (all are important): patient, clinician, and observer.
- Rotate roles each role play session so everyone have opportunity to practice the conversation.
- At the beginning of each role play, spend one minute to read the case and get familiar with your role.
- Observer will observe and take notes using the observation sheet.



Clinician role:

- Read front page of the case and learn about who your patient is.
- Proceed as if this appointment booked just for this discussion
- Follow the Serious Illness Conversation Guide in order, but respond to questions and concerns from the “patient” as appropriate

Patient role:

- You become a patient with the medical condition described in the case. Read front page of the case.
- Take a moment to read the script for patient on the backside of the case. Get a general idea of who you are. Base your answers on the responses given and keep your answers short. Please do not be a very challenging (or “nightmare”) patient.

Observer role:

- Read and use Observation Worksheet and be the time keeper.
- When the clinician role is ready, start the role play.
- In 15 minutes or when the conversation ends, observer stops the role play.
- Observer facilitates debriefing (approximately 5 min).
 - Ask Clinician Role what went well, what was challenging, what will do differently next time.
 - Ask Patient Role what went well, what was challenging, any suggestion for the clinician.
 - Share your observation and any suggestions.

Role Play Case 1: COPD and CHF

Patient:

- 72 year-old retired barber/hairdresser
- COPD, CHF, diabetes, osteoarthritis, obese
- Just been referred for home oxygen
- Two hospitalizations this year for CHF
- Needs help with shopping
- Difficulty walking two city blocks
- Married and lives with spouse; adult children do not live locally

*He/She is a candidate for a discussion using the Serious Illness Conversation Guide to understand more about his/her values, goals, and preference of care as the illnesses progress.

As you prepare to meet with the patient, you consider the following:

1. Patient has COPD, CHF, and multiple co-morbidities
2. **Prognosis:** Given the hospitalizations and functional challenges, you estimate his/her prognosis as likely less than 2 years, but death could be sudden and without warning.

Proceed as if this appointment booked just for this discussion.

Follow the Serious Illness Conversation Guide in order, but respond to questions and concerns from the “patient” as appropriate.

The goal of the discussion today is to explore patient’s values and goals using the Serious Illness Conversation Guide. The focus should be on values and goals for the months ahead rather than procedures and treatments.

Role Play Case 1: CHF and COPD

Patient Role

Description	Emotional: You are scared that things are getting harder than they used to be, like running errands. You are sad and emotional when you hear your prognosis.
Questions	Suggested Responses
How are things going?	<i>I'm getting by.</i>
Set-up	<i>Whatever you want. You're the boss.</i>
Understanding	<i>I don't feel like I used to. Some things are harder than they used to be. My spouse has to run errands with me now.</i>
Information Preferences	<i>I want to know everything.</i>
Share concern about the future	<i>Is that really true? Be sad. (Turn away from the clinician and put your head down and hands over your eyes. Re-engage in 15-30 seconds after the clinician allows silence.) I've been feeling weaker but that news is a lot to take in. I know this is important though. I've been worried about this for a while.</i>
Goals	<i>I want to be able to play cards with our friends. I want to spend more time with my family.</i>
Fears/Worries	<i>I worry about suffocating. That happened before I went into the hospital and it was terrifying. I hate feeling more dependent on my spouse and friends.</i>
Strengths	<i>My spouse and my friends give me strength. They help me get through.</i>
Function	<i>Being able to interact with my spouse is the most important thing. I'm not running marathons or anything.</i>
Tradeoffs	<i>If going to the hospital means I can feel better when I get short of breath and have more time with my family, I want that. If there comes a time when I'm just a vegetable, I wouldn't want to put my spouse through that.</i>
Family Understanding	<i>I signed the proxy form already; it is my spouse. I don't want to worry the kids about all of this. They're living their lives.</i>

Observation Worksheet for Role Play

While observing the conversation between patient and clinician, please record **if** and **how well** the clinician accomplishes the following asks, including specific observations in the Notes section.

Starting time: _____

Ending time: _____

Steps	Great Job	If selected, provide feedback		Notes
		Suggestions	Not Done	
Set up conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Explain goal(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask permission to proceed with conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess illness understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess preferences for information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Share prognosis based on information preferences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Use wish/worry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Allow silence for patient to react	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Name and explore emotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about fears and worries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about strengths	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about critical abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about tradeoffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about family involvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Summarize patient goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Make a recommendation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Overall, the clinician talk <50% of the time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Check in with patient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Affirm commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

ONCE THE ROLE PLAY HAS ENDED, PLEASE USE THE FOLLOWING TO DEBRIEF:

- Ask the clinician how the role play went for them:
 - What went well?
 - What was challenging?
 - What would you do differently next time?

- As a group, discuss what they noticed and helpful strategies for addressing challenges with these conversations

Role Play Case 2: Parkinson's Disease

Patient:

- 84 year-old, retired high-school teacher
- Elderly living with Parkinson's: medication no longer working as well
- Two hospitalizations this year; one with an ICU stay due to complications from hip surgery after a fall
- Worsening balance issues and several falls at home; decreased appetite
- Spouse deceased
- Lives below his daughter in a two story multifamily home
- Two kids live locally; multiple grandchildren
- You know the patient very well

He/she is a candidate for a discussion using the Serious Illness Conversation Guide to understand more about his/her values, goals, and the type of care he/she would want as the illness progresses.

As you prepare to meet with the patient, you consider the following:

- The patient has Parkinson's disease, multiple falls and hospitalizations
- Prognosis: Given the recent hospitalizations and declining functional status, you are concerned that the patient is at risk for repeated hospitalizations and increasing difficulty managing at home on his/her own.
- He/she would therefore benefit from a discussion about his/her goals and priorities for future care.

Proceed as if this appointment booked just for this discussion.

Follow the Serious Illness Conversation Guide in order, but respond to questions and concerns from the "patient" as appropriate.

The goal of the discussion today is to explore patient's values and goals using the Serious Illness Conversation Guide. The focus should be on values and goals for the months ahead rather than procedures and treatments.

Role Play Case 2: Elderly Parkinson's Patient Role

Description: **Amenable:** You are not sure why this visit with your doctor is different from all the others. When asked though, you are clear about your wishes.

<i>Questions</i>	<i>Suggested Responses</i>
How are things going?	<i>Same old, same old.</i>
Set-up	<i>You and I have known each other a while. You know me, my kids know me. What is there to talk about?</i>
Understanding	<i>I know this Parkinson's is going to be the end of me, but I'm a fighter. I've lived through worse.</i>
Information Preferences	<i>Keep it to the big picture. How much time I've got left is up to God.</i>
Share concerns about the future	<i>That's not a surprise to me, but there's nothing we can do about it.</i>
Goals	<i>I want to stay in the house I've been in for 40 years. I want my independence. It would be great to see my oldest grandkid go to college. He/she is 15 and reminds me of my spouse.</i>
Fears/Worries	<i>Not being myself. Losing my independence. I don't want to go to a nursing home. Never.</i>
Strengths	<i>I can handle anything. I've been through a lot. My faith always gets me through.</i>
Function	<i>I want to be able to take care of myself, use the bathroom on my own. I want to feel like myself and do the things I like to do. I want my dignity.</i>
Tradeoffs	<i>I don't want any of those things. No tubes or machines. I saw my spouse die in the hospital and I don't want that.</i>
Family Understanding	<i>I don't want to add to my kids' worries. They have their own lives.</i>

Observation Worksheet for Role Play

While observing the conversation between patient and clinician, please record **if** and **how well** the clinician accomplishes the following asks, including specific observations in the Notes section.

Starting time: _____

Ending time: _____

Steps	Great Job	If selected, provide feedback		Notes
		Suggestions	Not Done	
Set up conversation Explain goal(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask permission to proceed with conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess illness understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess preferences for information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Share prognosis based on information preferences Use wish/worry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Allow silence for patient to react	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Name and explore emotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about fears and worries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about strengths	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about critical abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about tradeoffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about family involvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Summarize patient goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Make a recommendation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Overall, the clinician talk <50% of the time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Check in with patient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Affirm commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

ONCE THE ROLE PLAY HAS ENDED, PLEASE USE THE FOLLOWING TO DEBRIEF:

- Ask the clinician how the role play went for them:
 - What went well?
 - What was challenging?
 - What would you do differently next time?
- As a group, discuss what they noticed and helpful strategies for addressing challenges with these conversations

Role Play Case 3: Pancreatic Cancer

Patient:

- 52 year-old engineer
- Stage IV pancreatic cancer
- He/she is receiving chemotherapy; 3 months of chemotherapy so far
- Metastases shrinking on CT Scan
- Patient is here alone
- Spouse very involved; 1 adult son
- Patient returned to work 4 weeks ago
- **Setting:** Primary care office; you know the patient very well

He/she is a candidate for a discussion using the Serious Illness Conversation Guide to understand more about his/her values, goals, and the type of care he/she would want as the illness progresses.

As you prepare to meet with the patient, you consider the following:

- The patient has stage IV pancreatic cancer.
- **Prognosis** at this stage is likely months to a year.

Proceed as if this appointment booked just for this discussion.

Follow the Serious Illness Conversation Guide in order, but respond to questions and concerns from the “patient” as appropriate.

The goal of the discussion today is to explore patient’s values and goals using the Serious Illness Conversation Guide. The focus should be on values and goals for the months ahead rather than procedures and treatments.

Role Play Case 3: Pancreatic Cancer

Patient Role

Description	Resistance: You are not sure you want to engage in the conversation, but you proceed once the clinician reassures you. When you get your prognosis, you are not ready to believe that time is short because you will beat this.
Questions	Suggested Responses
How are things going?	<i>Things are ok, feeling better in the last few weeks. I went back to work last week.</i>
Set-up – is this ok?	<i>I'm really feeling ok right now. Do we have to talk about this?</i> (Once the clinician explains the goal of the conversation, you say) <i>Ok, I understand. Let's talk.</i>
Understanding	<i>I know I have pancreatic cancer and that it spread, so I know it's not good, but I've been feeling a bit better recently.</i>
Info Preferences	<i>I want to know everything I can about what's going on.</i>
Share concern about the future	<i>I'm not like everyone else. I'm going to beat this. I deal with this by staying positive. Are you really saying I don't get better and have much time left? (Give resistance for 15 seconds. When the clinician aligns with your hopes but explains the need to plan for the future, proceed with the conversation.)</i>
Goals	<i>My son's wife is pregnant; I want to see my grandchild. I was planning to retire in 1 or 2 years and my spouse and I want to travel. In the meantime, I want to spend as much time as I can with my family.</i>
Fears/Worries:	<i>Being a burden. Having my spouse see me really sick. Being helpless. Leaving my spouse alone without things being in order. I worry about what happens if the treatment stops working.</i>
Strengths	<i>Supporting my family and knowing I can be there for them.</i>
Function	<i>I want to be able to spend time with my family. We love talking over dinner together. I want to be able to think clearly. I don't want to spend any time in a nursing home. My father had a terrible experience in a nursing home.</i>
Tradeoffs	<i>I want to do whatever I can to have time to spend with my family so I can see my grandkid and spend time with my spouse, now that we'll have more time after I retire.</i>
Family Understanding	<i>I haven't talked with my spouse about my wishes, but now I'm wondering if I should. My son and his wife are so busy I don't want to bother them.</i>

Observation Worksheet for Role Play

While observing the conversation between patient and clinician, please record **if** and **how well** the clinician accomplishes the following asks, including specific observations in the Notes section.

Starting time: _____ Ending time: _____

Steps	Great Job	If selected, provide feedback		Notes
		Suggestions	Not Done	
Set up conversation Explain goal(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask permission to proceed with conversation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess illness understanding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assess preferences for information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Share prognosis based on information preferences Use wish/worry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Allow silence for patient to react	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Name and explore emotions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about fears and worries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about strengths	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about critical abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about tradeoffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Ask about family involvement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Summarize patient goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Make a recommendation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Overall, the clinician talk <50% of the time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Check in with patient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Affirm commitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

ONCE THE ROLE PLAY HAS ENDED, PLEASE USE THE FOLLOWING TO DEBRIEF:

- Ask the clinician how the role play went for them:
 - What went well?
 - What was challenging?
 - What would you do differently next time?
- As a group, discuss what they noticed and helpful strategies for addressing challenges with these conversations