

## **PAD Champion Facilitators Checklist**

### **Before the facilitation meeting:**

- ✓ Introduce the idea of the PAD and the facilitation process to the person
- ✓ Give the person informational material and things to think about before facilitation session or workshop, including worksheets for advance instruction and health care power of attorney

### **During the facilitation meeting or workshop:**

- ✓ Use the Facilitator's Guide and copies of PAD forms to guide the interview
  - If possible, type the forms into a fillable form
- ✓ Encourage designation of a health care agent, and check to see if the person has talked to the selected person about being in this role
  - Questions to consider: is the HCA willing, capable, and available?
- ✓ Ask the person to sign a release of information to share information in the PAD with Bebe Smith for coaching on facilitation skills as part of the Crisis Navigation Project (this is optional, but strongly encouraged)
  - Make a copy of the signed ROI for the person, and put original in the stamped envelope to return to SRAHEC
- ✓ Ask the person to consider joining the Duke research registry
  - Give the person the information sheet about the Duke "Contact List" or registry.
  - Use script to ask person if they are willing to be contacted by Duke about having their name included on a registry of people who can be contacted in the future about Duke research studies on PADs
  - If the person agrees, have them fill out the contact information form. Put the completed form in the envelope to return to SRAHEC.
- ✓ Notarization—REMEMBER THE PAD MUST BE SIGNED IN PRESENCE OF A NOTARY!
  - Have the person sign PAD forms in presence of a notary and two witnesses
  - If not possible at the time of facilitation, help the person develop a plan to have the forms notarized in front of two witnesses, and follow up to make sure they get notarized

### **After the facilitation meeting**

- ✓ Assist the person with distributing the PAD, including the following:
  - Keeping at least one copy for themselves, stored in an accessible location

- Health care facilities the person may go to IF the person has an active medical record
- Cardinal Innovations, if the person is a member
- The person(s) appointed as health care agent
- Any other support people the person wants to give it to – could be family/friends/healthcare providers
- ✓ File a copy of the PAD with the Sec. of State website <https://www.sosnc.gov/ahcdr/>
  - To file: make a copy and mail to the Sec. of State, with the fee
  - The person will receive a wallet card with information how to access the online repository, and should keep the card in their wallet or purse
- ✓ If the person has agreed to share a copy of the PAD for quality assurance, make a photocopy and use a black Sharpie to mark out personal information on copy of PAD to share with Crisis Navigation Team
- ✓ Put redacted copy of PAD, release of information, and registry contact information in stamped, addressed envelope and mail to **Bebe Smith, SRAHEC, 1601 Owen Dr., Fayetteville NC 28304**
- ✓ Complete PAD survey at the online link:  
<https://redcap.duke.edu/redcap/surveys/?s=NTWCKCK38N>
- ✓ Send invoice with proof of survey completion to Kate Smith at [kate.smith@sr-ahec.org](mailto:kate.smith@sr-ahec.org)
- ✓ After facilitating a PAD, schedule a coaching a session with Bebe. The coaching sessions will be tailored to individual facilitators and are intended to strengthen skills and increase competence with facilitation [bebe.smith@sr-ahec.org](mailto:bebe.smith@sr-ahec.org) or 919-824-3862

Supplies for the PAD facilitator:

Black sharpies to redact personal information – put the person’s initials on the copy of the PAD

Envelopes stamped and addressed to SRAHEC

Forms:

PAD Champion Facilitator Checklist

PAD AI Worksheet.doc

Advance Instruction for Mental Health NC Form 12-15.doc

PAD CHPA Worksheet.doc

HealthCarePowerofAttorney2007e.docx

Script for Crisis Navigation Project facilitators to introduce Duke registry

Contact List PAD Research BRIEF INFO SHEET

Form to gather contact information from prospective subjects

PAD ROI 2017 9-21-17