**Serious Illness Conversation Assessment Tool**

**Use this form to take notes while observing another clinician during a SI Conversation. Provide feedback.**

| Component | Description | Comments: |
| --- | --- | --- |
| **Identify for SI conversation** | ▪ Accurately identifies criteria that qualified patient for SI conversation | |
| **Introduces Conversation** (Step 1) | ▪ Describes the purpose of the conversation- align care with goals if patient were to get sicker | |
| **Discusses Understanding of Health** (Step 2) | ▪ Elicits patient understanding of current health condition<br>▪ Uses probes as needed | |
| **Elicits Values and Goals of Care** (Step 3) | ▪ What would be most important if patient gets sicker?<br>▪ What do they hope for their medical care?<br>▪ Concerns or worries about medical condition?<br>▪ Tradeoffs – what are they willing to go through for the possibility of more time? | |
| **Makes a Plan** (Step 4) | ▪ Elicits how much family and doctor know about priorities and wishes<br>▪ Affirms or troubleshoots barriers<br>▪ Documents in place and in EMR? | |
| **Summarizes** (Step 5) | ▪ Reviews what patient verbalized as most important<br>▪ Reviews who they need to talk to about what is important to them<br>▪ Reviews forms needed to complete | |
| **Close and Follow-up Plan** (Step 6) | ▪ How did the conversation make them feel?<br>▪ What were some thoughts about what they talked about?<br>▪ Other next steps? | |

**Debrief the conversation as follows, with self-reflections first and observer feedback second:**

One thing that went well that I/you should continue doing in the future is …

One thing that I/you may want to do differently in the future is …