Purpose: To understand the standard workflow for processing the Advance Care Planning (ACP) paper documents that a patient brings into the office.

**Process Steps**

1. Patients add/update their ACP documents by bringing updated paper copies into their provider’s office.

2. PCC/MA reviews Advance Directive
   - Ensure form is completed
   - Check for patient signature
   - Check for witnesses’ signatures and/or notary

3. PCC/MA reviews POLST
   - Check for patient signature
   - Ensure Physician, PA or NP has signed

4. PCC/MA scans ACP Document using the point of care scanner to the appropriate folder to send to HIMS
   - PCC/MA sends message to provider to notify of new ACP document
   - PCC/MA keeps paper Adv. Directive or POLST for 1 month and shreds after verifying it has been scanned into patient’s chart

**ACP Document Types**

**ADVANCE DIRECTIVE**
Patient signature & two witnesses co-sign

OR
Notary Signature

**POLST**
Patient & Physician, NP, or PA signature needed

Note: Employees should not be witnesses on Advance Directives for patients

Note: Point of care scanners may be different at different clinics

SHC- 24 hr. turnaround for non-urgent documents <email to DL-HIMS-DocumentImaging@stanfordhealthcare.org for urgent requests
SMP- 72 hr. turnaround for non-urgent documents <can also scan to Urgent folder for quicker upload time