

Serious Illness Conversation Guide - Surrogate Social Work & Case Management

SET UP | I'd like to **talk together** about what's happening with _____'s [eg. your wife's, husband's, other relationship description or name] health and **what matters to them. Would this be okay?**

ASSESS | To make sure I share information that's helpful to you, can you tell me **your understanding** of what's going on with _____'s health now?

How much **information about what might be ahead** with _____'s health would be helpful?

OPTIONAL SECTION

ANTICIPATORY GUIDANCE | I want to share **my understanding** of where things are with your health: **[Choose one]**

Uncertain: It can be difficult to predict what will happen. **I hope they will feel as well as they can** for a long time, and we will toward that goal. **It's also possible that they could get sick quickly**, and I think it's important that **we prepare** for that.

Function: It can be difficult to predict what will happen. **I hope they will feel as well as they can** for a long time, and we will work toward that goal. **It's also possible that it may get harder to do things** because of their illness, and I think it's important that **we prepare** for that.

Pause: Allow silence. Validate and explore emotions.

EXPLORE | If their health gets worse, what do you think are _____'s **most important goals**?

What do you think are _____'s biggest **worries**?

What **gives** _____ **strength** as they think about the future?

What **activities** bring joy and meaning to their life that you can't imagine them living without?

If _____'s health gets worse, **how much would they be willing to go through** for the possibility of more time?

How much do the **people closest to** _____ know about _____'s priorities and wishes for their care?

Having talked about all of this, what are _____'s **hopes** for their health?

CLOSE | I've heard you say _____. Keeping that in mind, and what we know about _____'s health, I **recommend** that we _____. This will help us make sure that _____'s **care plan reflects what's important to them. How does this plan seem to you?**

We will do everything we can to help you and _____ through this.

Handoff to Key Clinicians

I talked with the patient's surrogate about _____. I learned _____. I think they would benefit from talking with you about _____.



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