

Patient Directives Screening Checklist

Advance Directive

Does the patient have an advance directive or a durable power of attorney? ☐ Yes ☐ No

If YES:

- ☐ Obtain a copy and enter in patient record

If NO:

- ☐ Advise the patient to visit the [U.S. Living Will](#) website for forms and toolkits or the [American Bar Association](#) website for health care advance planning assistance
- ☐ Obtain contact details for the surrogate decision maker should the patient become unable to make decisions for himself or herself
- ☐ Consider referral to social work for further support and education

Financial Health

Does the patient have concerns regarding cost of care and earning potential after surgery? ☐ Yes ☐ No

- If YES:** ☐ Consider referral to social work and/or hospital financial counselor

Shared Decision Making

Are there serious trade-offs involved in surgical treatment (for example, high risk of morbidity, mortality, or change in functional status)? ☐ Yes ☐ No

- If YES:** ☐ Consider use of the [Best Case/Worst Case Communication Tool](#) to aid in informed consent

Resource

To estimate risk levels for morbidity, mortality, and functional status based on the patient's risk factors, consider use of the [ACS Surgical Risk Calculator](#) <https://riskcalculator.facs.org/RiskCalculator/>

Important Notice

These sample checklists are provided for informational purposes only and should NOT be used in the care of a patient outside of a comprehensive preoperative program such as Strong for Surgery. Patients should not rely on information on this checklist as an alternative to medical advice from a doctor or other professional health care provider. To find out how you can start using the Strong for Surgery checklist in your clinic, please contact us at qualityresources@facs.org.

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