

Shared Decision-Making Checklist

For Family Caregivers and Care Partners

Patients often rely on healthcare providers to tell them what care they need. But for our relatives and friends (care receivers) to get the best care, especially if they have cognitive difficulty or serious illness, they, their healthcare team and you can make decisions together. This is called shared decision making. Your provider shares medical knowledge, and you (and the person you care for) share what you want out of the care. Then you make a decision together. If your care receiver's healthcare team hasn't spoken about shared decision making, you can still take part in the process.

Use this checklist to start the shared decision-making conversation. Bring it with you to appointments. Additional copies of this checklist may be downloaded and printed from [FAIRHealthOlderAdults.org](https://www.fairhealtholderadults.org)

Before the Appointment: Think about What Matters and Write It Down

- What matters most to your care receiver in life? What are their goals for treatment? Do they want to manage symptoms or to be able to do things they can't do now?
- What would you like to know about your care receiver's health problem and treatment options? A clinician (like a nurse or primary care provider) also may be able to help you and your care receiver discuss your goals and wishes.
- Will costs affect your decision?
- Check out the recommended resources below.

During the Appointment/Discussion: Ask Questions, Express Your Care Receiver's Goals and What Matters to Them (Take notes you can refer to later.)

- I'd like to make this decision with you based on my care receiver's goals and what matters most to my care receiver and on your knowledge.

What my care receiver would like most from life is

What matters most to my care receiver is

What my care receiver is most afraid of is

Are there decision tools we can use to make this decision together?

How can I learn more about their condition and options?

The decision aids are not meant to be medical advice, diagnosis or treatment. They are meant to offer information to help you take part in shared decision making with health professionals. The clinical options in the decision aids should be discussed with your health professional, as each patient's condition will vary.

- What are my care receiver's options for treatment?
- What are the benefits of the options?
- What are the risks to my care receiver if we choose this option? What if my care receiver prefers not to do anything?
- What are the costs for each option? With whom can I speak to learn more about treatments and how to pay for them?
- For my care receiver's goals and health problem, what would be the best options? For treatment options, does my care receiver have to follow certain rules?
- Is there any new information about treating their condition that my care receiver should know about?
- What support is on hand for people with the same health problem(s) as my care receiver? I don't understand. Can you explain this to me a different way?
- I'd like a second opinion. Can you provide a referral?
- If I have any questions, can I call or email you? Can you give this information to me in writing?
- What are next steps? Which other providers, if any, should my care receiver see next for continuing their care?

After the Appointment

- Keep the notes in a handy place so you can look at them later. If you're not clear on next steps, ask!
- If you need more time to make a decision with your care receiver, let the healthcare team know.
- If you'd like a second opinion for your care receiver, schedule a consult with another provider.

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