

ConnexCare

P&P Number:	CC007	Original Approval Date:	4/16/2003
Title:	Advance Directives	Policy Revision Date:	5/21/2025
P&P Area:	Corporate Compliance	Procedure Revision Date:	5/14/2025
Reviewing Committee:	Quality Committee	Committee Review Date:	5/14/2025
Approved by:	Board of Directors	Last Approval Date:	5/21/2025

POLICY:

It is the policy of ConnexCare to ensure that all adult patients are informed of their rights and are supported and protected as they exercise their right to formulate written or oral instruction regarding their health care in the event such adults become incapacitated and are unable to direct their own health care. Further, this facility will not discriminate in any way based upon whether an individual has or has not exercised their right to make advance medical directives. Medical Orders for Life-Sustaining Treatment (MOLST), Do Not Resuscitate (DNR), Advance Directive (AD), or Psychiatric Advanced Directive will be honored by ConnexCare.

RESPONSIBILITY:

It is the responsibility of the Corporate Compliance Officer to make sure all processes are followed as outlined by the current HIPAA requirements. The Senior Management is ultimately responsible for the confidentiality practices of ConnexCare.

DEFINITION:

Adult – a person who is 18 years of age or older, or is pregnant or the parent of a child, is married or is emancipated. [In the event that a person who is not considered an adult has a serious life-threatening medical concern such as terminal cancer, a provider may encourage a family to consider the need for advanced directives. This would be facilitated by the provider.]

PROCEDURE:

All adults will be offered an CC007.01 Advanced Directive Booklet via the electronic form system annually and noted by the patient signing the Patient Consent Form (CC009.01 on paper or via digital means).

The CC007.01 Advanced Directive Booklet includes: Advance Care Planning, Choosing your Spokesperson, Information about forms; NY Health Care Proxy, NY Living Will, a DNR order and MOLST form. If an adult patient has a serious mental illness diagnosis, and is being treated by a Mental Health provider, they will be offered CC007.02 Psychiatric Advanced Directive by their Mental Health Provider. A nurse, provider or Corporate Compliance Officer will provide clarification of patient questions if needed.

Upon receipt of the completed paperwork, the paperwork will be copied and scanned into the patient's electronic health record chart and **the original will be kept by the patient** (this includes any copies of DNR, MOLST, Health Care Proxy, Living Will or Psychiatric Advanced Directive).

Documentation in the EHR:

If the patient obtains a blank form or submits a completed CC007.01 Advanced Directive Booklet (AD), CC007.02 Psychiatric Advanced Directive (PAD), or other advanced directive to ConnexCare, documentation of this will be recorded in the Practice Management system, under Privacy NPP, utilizing the following steps (also identified in the Patient Registration P&P CLE 003):

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1. In Practice Management choose patient, verifying patient name and date of birth
2. Choose Privacy category on the side, then the Advanced Directive tab across the top
3. Choose new, then select the box marked "Type"
 - a. To document that you gave them a blank AD pr PAD, enter "PPA" in the "Type" box.
 - b. To document that the patient declined a blank packet, enter "DECL" in the "Type" box.
 - c. To document that we received an AD, PAD or other advanced directive, enter the corresponding code in the "Type" box.
4. Ensure the date is correct
5. Click in the "Notes" box
 - a. Enter relevant information. For example, "pt selects Jane Test as Health Care Proxy, John Test is secondary proxy" or "wants antibiotics, no feeding tube, DNR".
6. At any point, **if you are not sure, task the packet to the Compliance Officer to enter.**
7. Completed forms/documents will be scanned into the patient's Electronic Health Record.
 - a) The scanned image will be saved into the Legal section of the Electronic Health records in the specific category of the document. Once this is complete, it will be documented in the Privacy/Advanced Directive section of the patient's electronic health record.
8. Then Forward document via task in the chart to Corporate Compliance Officer (CCO) for review. CCO will add an alert to the patient chart which reflects the document on file such as "Advanced Directives- DNR on File," "HealthCare Proxy on file," "MOLST on file" or "Psychiatric AD on file".
9. The CCO will then forward the document to the provider for awareness.

Returning the Paperwork at a Later Date:

If the patient accepts the packet and would like to take the information and return it at a later date, a task labeled Advanced Directives will be generated, with a quick text ADV added as shown below and kept assigned to the Patient Access representative who began the process. If a Psychiatric Advance Directive the Mental Health Provider will send the Advanced Directive task to their PAR point person. The due date of the task is changed to two weeks from the date given.

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The screenshot shows the 'New' task creation window in ConnexCare. The 'To:' field is 'Tricia Clark'. The 'Subject:' field is 'Advanced Directives'. The 'DUE' date is '12/28/2017'. A 'Select Quick Text' dialog is open, showing a list of quick text entries. The entry 'Advanced Directives packet taken by patient a' is selected, and its shortcut '/adv' is highlighted. The 'Full Quick Text' field shows 'Advanced Directives packet taken by patient at today's date of service'. The 'Keywords' field shows 'adv'.

- **After a two-week period**, if the information has not been returned, the patient access representative (PAR) will place a call to the patient to see if any further clarification is needed and request that the completed documentation forms be returned as soon as possible. If the patient has questions the PAR can't answer, forward the call to the Compliance Officer for clarification.
- **If the document is returned**, follow steps 1-9 above.

Any communication regarding the call should be documented in the task:

- **If the patient states that they understand the process and will return the paperwork:** that information should be noted in the task and the task should be closed.
- **If the patient requests assistance with completing the paperwork:** the task should be sent to the RN care manager to provide support. The care manager will contact the patient to follow-up. If the paperwork for these patients has still not been returned 30 days from the date it was given, the care manager will generate an Advanced Directives clinical correspondence. It will be mailed to the patient requesting that the paperwork be returned at their next scheduled appointment. This should be documented in the task and the task may then be closed.
- **If the PAR is unable to reach the patient:** the task will then be forwarded to an LPN/MA for holding. Upon receipt, they will update the due-date for the task to reflect 2 weeks out from current date to monitor completion. If nothing has been heard from the patient after the two

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weeks have gone by, the clinical staff member will send an Advanced Directives clinical correspondence and close the task.

Employer related requirements:

- Provide regular in-service education to staff involved in provision of care including medical staff concerning the facility's policies and procedures concerned with advance directives.
- Ensure that no person is discriminated against in the provision of care or otherwise discriminated against based on whether or not the adult has executed an advance directive.

Resources:

CC002.03 Notice of Privacy Practices/AD
 CC002.01 Notice of Privacy Practices/AD Signature Form
 CLE003 Patient Registration
 CC007.01 Advanced Directive Booklet
 CC007.02 Psychiatric Advanced Directive

Distribution:

<input checked="" type="checkbox"/> Administration	<input type="checkbox"/> Billing	<input type="checkbox"/> Dental Assistant	<input checked="" type="checkbox"/> Clerical
<input type="checkbox"/> Maintenance	<input checked="" type="checkbox"/> Provider	<input type="checkbox"/> RN	<input type="checkbox"/> BH
<input type="checkbox"/> Dental Provider	<input type="checkbox"/> Finance	<input type="checkbox"/> Human Resources	<input type="checkbox"/> IT
<input checked="" type="checkbox"/> Clinical Support Staff			
<input type="checkbox"/> Dental	<input checked="" type="checkbox"/> Medical	<input type="checkbox"/> Behavioral Health	<input type="checkbox"/> All Staff
<input type="checkbox"/> SBHCs	<input type="checkbox"/> Pulaski	<input type="checkbox"/> Central Square	<input type="checkbox"/> Parish
<input type="checkbox"/> Fulton	<input type="checkbox"/> Phoenix	<input type="checkbox"/> Oswego	<input type="checkbox"/> Mexico

Record of Change:

Revision	Date	Responsible Person:	Description of Change:
1	5/22/2024	N/A	All previous versions prior to 5/22/2024 are recorded in annual Policy and Procedure Folders
2	8/15/2024	Caitlin Doran Prior	Removed he/she and replaced with their and modified "Medical Orders for Life-Sustaining Treatment (MOLST)/Do Not Resuscitate (DNR)/Advance Directive (AD)" to be clear. Revision of the order of steps noted in the Procedure to promote clarity and understanding for staff. Addition of steps 8 & 9. Correction of minor typographical error.
3	4/15/2025	Caitlin Doran Prior	Added information regarding CC007.02 Psychiatric Advanced Directive.