



SAMPLE CARE PLAN MEETING SCRIPTS

Starting the Meeting

Topic & Suggested Order	Example Phrases to Use
Welcome	<p>[Greet patient by name]</p> <ul style="list-style-type: none">• Thank you for being here, everybody.• Today, we want to brainstorm ways to make dialysis better fit your needs and priorities.• This may be different from your previous care planning experience.
Meeting purpose	<ul style="list-style-type: none">• We will start by asking a few questions to learn more about you and what matters to you.• This will help us match dialysis care with your needs and priorities.• We will all work together and listen to each other.• [Care team member] will be taking notes about the conversation, and you can take a copy of the notes home with you afterward.• Feel free to share your thoughts or ask questions any time during the meeting – we want to hear from you!
Additional meeting attendees (e.g. family, care partner)	<ul style="list-style-type: none">• We are glad you're here [guest name].• Feel free to ask questions throughout.
Timing	<ul style="list-style-type: none">• We want to be respectful of everyone's time.• This meeting will be about 30 minutes long.• If we do not get to all of your questions, we can schedule another opportunity to talk.
Transition into conversation guide	<ul style="list-style-type: none">• Are there any questions before we begin?



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Closing the Meeting

Topic & Suggested Order	Example Phrases to Use
Transition to closing	I'm going to walk us through some of what we discussed today.
Summarize the developed care plan (i.e. notes)	<p>If plenty of content to review...</p> <ul style="list-style-type: none">• I've tried to summarize our conversation on this paper, but let me know if you want me to change or add something.• <i>[Walk through identified priorities, barriers, next steps]</i> <p>If minimal content to review...</p> <ul style="list-style-type: none">• I don't have too many notes, so if there is anything you want me to add, just let me know.• <i>[Describe care plan sections (priorities, barriers, next steps) to prompt patient on possible information to add]</i> <p>NOTE: It is OK if no priorities or next steps are identified. Remind patient that priorities can change or be added at any time.</p>
Share copy of the care plan (i.e. notes)	<ul style="list-style-type: none">• Do you have any questions about these notes?• Would you like a copy of these notes to take home?
Discuss follow-up plans	<ul style="list-style-type: none">• We will follow up about what we discussed today, but please check in with us as well – reminders are always helpful!• If you need anything or have more questions in the future, let us know so we can support you.
Sign the care plan	<ul style="list-style-type: none">• There is one last step in this meeting.• Would you please sign this document to show we completed the meeting today?
Close the meeting	<ul style="list-style-type: none">• Thanks for joining us and sharing your thoughts.• We will be in touch!