



## Life Care Planning Summit Consensus Statements

Life Care Planning Summits bring together leaders in life care planning from a variety of organizations with a goal of promoting unity. Representatives of life care planning training programs, certification programs and professional associations join with researchers, practitioners and support service providers to explore the current state of the field and set future directions by agreeing to Statements in the areas of Professional Development, Education, Certification, Standards of Practice, Ethics, Methodology and Research.

### Professional Development

Life Care Planners shall hold, at minimum, a Bachelor's Degree and additional formal education if a specialty requires particular academic expertise.

Life Care Planners may come from a variety of disciplines, provided they have qualifications including five years' experience in a primary discipline, complete supervised time under a qualified life care planner and belong to a life care planning professional association.

Life Care Planners shall seek out mentor relationships, educating students and unaffiliated professionals about life care planning training, education, experience, special knowledge and required credentials.

Life Care Planners shall disseminate information regarding their area of practice through electronic collaboration, Web sites, peer-reviewed journals, books, conferences and symposia and professional associations.

Life Care Planning research shall be reviewed by peers through an objective and "blind" process that addresses methodology.

Life Care Planners shall understand the definition of reliability and consistently practice in such a manner.

Life Care Planners shall explore markets for life care planning outside litigation.

Life Care Planners shall have knowledge of relevant laws and regulations as well as local and national care standards.

Life Care Planners shall understand optimal outcomes achievable for particular injuries.

Life Care Planners shall promote and participate in a national organization for life care planners that serves as a single voice for the practice of life care planning and as a single repository for life care planning resources.

## Education

Life Care Planners shall complete 120 hours of training including courses that focus on disability issues and are specific to life care planning.

Life Care Planning programs shall be based on the latest knowledge and practices.

Life Care Planning programs shall cover certification-preparation as well as advanced topics and complex issues.

Life Care Planning programs shall be promoted widely

Life Care Planning programs shall be offered in accessible geographic locations and electronically.

Life Care Planning continuing education units shall be available at an increasing number of forums.

Life Care Planning continuing education units shall be available at forums that may not focus solely on life care planning.

Life Care Planners shall train themselves and recruit others to instruct educational programs.

## Certification

Life Care Planner certification shall render its holder a qualified life care planner, provided that certification is maintained.

Life Care Planner certification shall be renewed every five years with the accumulation of 60 continuing education units.

Life Care Planners shall be licensed and/or certified in their professional before being certified as a life care planner.

Life Care Planner certification standards shall be augmented.

The International Commission on Health Care Certification shall apply for National Commission for Certifying Agencies accreditation.

Life Care Planners shall hold a certification that has mechanism for complaints and resolution.

Life Care Planning certification shall flow from a practitioner-created core curriculum.

The Life Care Planning certifying body shall not be proprietary.

The Life Care Planning certifying body shall manage and disclose ethical complaints and violations.

Life Care Planning certification exams shall be developed and maintained by an advisory group.

Life Care Planning certification exams shall be administered by an autonomous entity independent of any organization that provides life care planning training and/or education.

## Standards of Practice

Standards of Practice terminology shall be reviewed.

Standards of Practice terminology shall be defined.

Standards of Practice shall delineate educational requirements for entry into the practice of life care planning.

Standards of Practice shall assert the role and accountability of life care planners.

Standards of Practice shall be based on a study defining the role and accountability of life care planners.

Standards of Practice shall allow for individual judgment and expertise.

Standards of Practice shall be unitized in the development of the practice of life care planning.

Standards of Practice shall be applicable to current practices.

## Ethics

Life Care Planners shall accept referrals only in their area of expertise.

Life Care Planners shall draft life care plans under supervision for one year.

Life Care Planners shall maintain objectivity.

Life Care Planners shall maintain strict adherence to confidentiality practices.

Life Care Planners shall renounce inappropriate, distorted or untrue comments about peers.

Life Care Planners shall renounce inappropriate processes and training.

Life Care Planners shall disclose and differentiate between the roles in which they may be called upon to act.

Life Care Planners shall avoid dual relationships when objectivity may be challenged.

Life Care Planners shall better define dual relationships.

Life Care Planners shall establish themselves within their primary field of practice.

Life Care Planners shall objectively place their client's interests before any personal or professional consideration.

Life Care Planners shall adhere to relevant Codes of Ethics.

Life Care Planners shall have recourse/corrective action processes available to them upon any allegation and/or confirmation of an ethical failure.

## Methodology

Life Care Plans shall be individualized.

Life Care Plans shall be objective and consistent.

Life Care Plans shall be lifelong and flexible.

Life Care Plans shall be a clear, concise and user-friendly document.

Life Care Plans shall be comprehensive and based on multidisciplinary data.

Life Care Plans shall utilize research for recommendations.

Life Care Planners shall consider the integrity of data.

Life Care Planning shall depend on data collection, analysis and synthesis.

Life Care Planners may request additional data, testing and evaluation if required.

Life Care Planners shall research condition, resources, services and costs.

Life Care Plans shall utilize established procedures.

Life Care Planning procedures shall be peer or organizationally reviewed.

Life Care Plans shall be developed in the client's best interest.

Life Care Plans shall include a basis for recommendations.

Life Care Planners shall utilize a reliable, consistent method for reaching conclusions.

Life Care Planners shall utilize adequate medical and other data for opinions.

Life Care Plans shall include an annotated list of requested and reviewed data/sources.

Life Care Planners shall utilize standardized procedures and tools for gathering and reporting information.

Life Care Plans shall feature standardized forms and formats.

Life Care Plans shall be consistent across similar cases.

Life Care Plans shall rely on medical/allied health professional opinions.

Life Care Plans shall be limited to the planner's expertise and scope of practice.

Life Care Planners shall methodically handle divergent opinions.

Life Care Planners shall properly inject personal expertise.

Life Care Planners shall utilize credible, evidence-based guidelines.

Life Care Planners shall conduct an in-person interview whenever permitted.

Life Care Planners shall utilize protocols for cost research.

Life Care Planners shall gather geographically relevant & representative prices.

Life Care Planners shall utilize protocols for using local versus national resources.

Life Care Planners shall utilize protocols for handling the impact of aging.

Life Care Planners shall follow generally accepted methodology.

Differences in clinical judgment can result in different recommendations

Life Care Planning databases, templates and software shall have appropriate foundation.

Life Care Planning products and processes shall be transparent and consistent.

## Research

Life Care Planners shall be involved in research.

Life Care Planners shall include research in life care plans.

Life Care Planners shall study the reliability, validity and accuracy of life care plans.

Life Care Planners shall assess the reliability, validity and accuracy of data and methods.

Life Care Planners shall conduct longitudinal studies.



Life Care Planners shall evaluate the cost-effectiveness of life care plans.

Life Care Planners shall study the impact of life care plans upon quality-of-life.

Life Care Planners shall understand and explain research used in a life care plan.

Life Care Planners shall utilize research that is reasonable, relevant and appropriate.