



# Introducing and Scheduling Proactive Care Planning for COVID-19

## *What matters most to you matters to us*

**Note to User:** This guide is for use by team member to invite and schedule individuals at greatest risk for complications from COVID-19, to have a proactive conversation about their preferences for care.

### 1. The invitation (virtual or in person)

*“During so much uncertainty amid the COVID-19 pandemic, one thing you can control is who speaks for you if you can’t speak for yourself. It is important that your healthcare team understand what matters most to you in the event that you become seriously ill as a result of COVID-19. We are eager to make sure we understand what you would want. What questions do you have?”*

### 2. Explore prior conversations about planning for future healthcare decisions

a. *“Have you chosen a person who would make decisions for you if you were unable to speak for yourself?”*

- **If yes:** *“It is important for your healthcare agent to understand your goals and treatment preferences.”* Obtain their name and contact information and record in medical record; proceed to #4.
- **If no:** Proceed to #3.

b. *“Have you completed an advance directive document or POLST form?”*

- **If yes:** *“It is important to review this document with your care team now to understand what matters most to you in the event you become seriously ill, and to include your healthcare agent in the conversation if at all possible, so they can support you with complex medical decisions and make decisions for you in the future if you become unable.”* Proceed to #4.
- **If no:** Proceed to #3.

### 3. For individuals who have NOT chosen a healthcare agent (e.g., legally appointed healthcare representative), provide information on how to choose this person

*“One of the most important decisions we encourage people to make is choosing someone you trust to make decisions for you. We call this person a healthcare agent. This person can support you with complex medical decisions and would make decisions for you in the future if you are unable.”*

*“There are four qualities you should look for. A healthcare agent should be willing to:*

- *Accept this role,*
- *Talk with you about your goals, values, and preferences,*
- *Follow your decisions (even if they do not agree with them), and*
- *Make decisions in difficult moments (e.g., stressful times, differing opinions; crisis situations).”*

*“Do you know anyone who could do this?”*

*“We can help you have a conversation with this person (and other loved ones) about what matters the most to you in the event you become ill, need assistance with complex medical decisions, and cannot speak for yourself.”*

#### 4. Provide the context for having further conversation

*“There’s no way to tell if a sudden illness, such as COVID-19, could leave you unable to make your own decisions. Your healthcare agent and loved ones may need to make decisions about treatment options and where you might receive care, such as in your home, hospital, or care facility. By giving direction ahead of time, your agent, loved ones, and doctors will know what matters most to you, treatments you want, and treatments that match your goals and values.”*

*“We are here to help you have a conversation with your loved ones, so they know your answers to questions such as:*

- *What is most important for you to live well? For example, if you were having a good day, what would happen on that day?*
- *What personal, cultural, or spiritual beliefs do you have, if any, that would impact your care?*
- *What do you want if you became very ill? For example, would you want your medical care to focus on living longer, maintaining current health, or comfort care?*
- *What else would you want us to know about what is important to you at this time?”*

#### 5. Make recommendations for continuing the conversation

*“Thank you for taking the time to talk with me today. Think of continuing this conversation with the care team as a gift of love to prepare those who care for you to know and honor your decisions and preferences. Let’s talk about next steps. Can I schedule a time for you to talk with a clinician and continue the conversation?”*

*“What questions do you have? Thank you again for talking with me today.”*

**Note to User:** Make an appointment (telephonic, telemedicine, video conference, or in-person, as appropriate) to talk with a clinician (e.g., Facilitator, nurse, social worker, chaplain, physician, advanced practitioner) to continue the conversation.

### Communication Skills

- **Explore meaning of words/phrases**  
*“What does, ‘I feel like a burden’ mean to you?”*
- **Paraphrase/clarify**  
*“You were frustrated being in the hospital; tell me more.”*
- **Ask, “Anything else?”**  
*“You have said you are weak, tired, and frustrated. Anything else?”*
- **Listen for and summarize themes**  
*“You have talked about how difficult it was making decisions when your father was seriously ill. This conversation can help better prepare your family.”*
- **Affirm/reaffirm purpose of conversation**  
*“You say this conversation is hard for you. I hope to help you today, to make it easier to learn how to talk to each other.”*
- **Verbalize empathy**  
*“I’m sorry to hear you lost your job. I see that this is very upsetting.”*

(over)

### Additional Communication Techniques

- **Use the Ask-Teach-Ask technique**  
When providing information:
  1. First, ASK... what the individual understands.
  2. Then, TEACH...provide information to fill in gaps in understanding.
  3. Last, ASK (i.e., Teach-Back)...assess understanding of information before moving on.*“These are new ideas for many people, so I want to make sure I was clear. Can you tell me what you now understand about \_\_\_\_\_?”*
- **Remain value-neutral**  
Avoid words, phrases, or nonverbal expressions that may communicate personal biases or values.
- **Pay attention to nonverbal communication**  
(facial expressions, body movements)

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