



# TOWN HALL GUIDE

## Background

The COVID-19 pandemic resulted in an almost complete cessation of in-person ambulatory care in many health care organizations for a prolonged period. As the pandemic raged, patients - older patients in particular - were disconnected from typical services such as in-home support, adult day health programs, and visits from family and friends. The resultant social isolation, twenty-four-hour news coverage of the coronavirus, and social media postings placed many people at risk for receiving inaccurate and/or conflicting information.

The MGH geriatric primary care practice, Senior Health, rapidly pivoted its care delivery to meet the needs of its patients in new and different ways. To respond to the constraints of social isolation, staff reallocation, and loss of usual in-home supports, the practice leadership designed Zoom virtual Town Halls. This model has now spread to other MGH adult and pediatric primary care and specialty practices and other healthcare organizations across the country. We are grateful to Drs. Matt Russell and Sharon Levine, Ms. Judy Willett and Ms. Monique Chateaufneuf for inspiring these Town Halls and developing simple and effective methods to implement them.

## Goals and Objectives of Zoom Town Halls

Our overall goal was to create an interactive forum for our patients to address questions, fears, and receive practical information about staying healthy during the COVID pandemic.

### Objectives:

- To provide up-to-date, timely, and accurate information related to the virus and precautions that could be taken.
- To increase the number of patients and community members with an identified medical decision-maker (health care proxy) with whom they have shared their wishes.
- To provide practical information about how our office practices will provide safe, in-person care, and why it is important to come in for care when needed, as well as information about how to access virtual care.
- To provide a virtual community to our patients, connecting them to clinicians and practice staff at each phase of the outbreak.
- To provide information about what to expect in case of a hospitalization, the critical importance of identifying at least one medical decision maker, how to think about what matters most with your goals for health and quality of life, and to share resources to support documentation of wishes. We use [www.joincake.com](http://www.joincake.com) and [www.prepareforyorucare.org](http://www.prepareforyorucare.org).



## Methods and Design

1. Create a planning group of practice or department staff with facilitation skills and strong knowledge of the patient population.
2. Determine patient population to invite to the Town Hall.
3. Confirm a virtual platform (e.g. Zoom, Microsoft Teams) with capacity for expected participants, recording, and security functions for a one-hour session.
4. Invite content experts AND practice staff to present and participate.
  - Content needs to be evidence-based, in plain language, and as current as possible.
  - It is preferable to invite Infectious Disease specialists to present the latest information about COVID.
5. Determine handouts or accompanying materials to be shared following the Town Hall.
  - e.g. latest updates on COVID, flu vaccines, what to expect if you come to the hospital for care, visitation policies, community resources, healthy recipes, book reading lists, exercise, and/or suggestions to enhance resilience.
6. Determine the best mode of inviting people: using their email addresses, patient portals, posters, social media, posting on Facebook sites, postings on practice or department websites.
7. Create a “talking points” document for the moderator to use with housekeeping tips, speaker titles, announcements, (see example in attachments section).
8. Create introductory PowerPoint slide with speaker names and titles.
  - Upload introductory slide and Town Hall recording/video to YouTube and other sites (see example in attachments section).
9. Send follow-up to people invited to the event with a link to the YouTube recording/video, handouts, and any future Town Hall dates.
  - Include evaluation forms as well, if of interest.
    - i. In our experience, responses were positive but very few responded. Practice clinicians have received very positive feedback directly from their patients.
10. Note the number of connected viewers during the event for data purposes.
11. Post YouTube recording/video to practice and department websites. Monitor “views” on the site. Record the number of “views” 1 month after the event (for data purposes).

## Conclusions

In times of healthcare crises, practices can easily create virtual gatherings to connect clinicians, staff, and their patients. Practices can readily provide patients and families up-to-date information and answer pertinent questions. Connecting virtually is inspiring and comforting for ALL participants! These can help to build longstanding relationships, loyalty, and resilience for everyone involved. A true “democratization of knowledge” experience!

### Links to Recordings

[https://youtu.be/WVpI-QJ\\_oMc](https://youtu.be/WVpI-QJ_oMc)

<https://www.massgeneral.org/medicine/pcgm/geriatrics/town-hall-videos>





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## ATTACHMENTS

### EXAMPLE: INVITATION



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Dear IMA Patients,

We would like to invite you to a live Zoom Town Hall on Tuesday, August 11, 2020 at 1pm with doctors from the MGH IMA Team 2 to discuss:

#### **"COVID-19 Information: General Information, Testing, Immunity, and Getting the Care You Need"**

Presenters:

- Welcome: Naomi Leeds, MD, Unit Chief, IMA Team 2
- How We are Making the Practice Safe: Maya Ginns, Head NP, IMA
- COVID-19 Testing and Immunity--What we Know: Michael Bierer, MD, IMA Team 2
- Coming in for Care and Virtual Visits: Michelle L'Heureux, MD, Clinical Director, Division of General Internal Medicine
- What Matters Most during COVID: Juliet Jacobson, MD, Medical Director for the Continuum Project
- Norie Mozzone, Ageless Grace Exercises
- Q & A: moderated by Susan Edgman-Levitan, PA, Executive Director, John D. Stoeckle Center for Primary Care Innovation

Attached are two resource documents – Community Resources and Planning Steps for COVID-19.

**You do not need to RSVP or respond to this email to join the Town Hall. Please see the instructions below on how to join.**

By video, on your computer or smartphone, via this Zoom link:

Join Zoom Meeting

<https://partners.zoom.us/j/91807623540>

Meeting ID: 918 0762 3540

One tap mobile

+13017158592,,91807623540# US (Germantown)

+13126266799,,91807623540# US (Chicago)

Please join 5-10 minutes early. If you have questions regarding the event, please contact [StoeckleCenter@partners.org](mailto:StoeckleCenter@partners.org). We look forward to seeing you on Tuesday, August 11th at 1pm.



THE JOHN D. STOECKLE CENTER  
FOR PRIMARY CARE INNOVATION  
*Your Primary Care is Our Primary Concern*



Continuum Project  
LIVING WELL WITH SERIOUS ILLNESS



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EXAMPLE: THANK YOU (WITH RECORDING LINK AND INTRODUCTORY SLIDE)

Dear IMA Team 3 patients,

Many thanks to those of you who were able to join us for our Town Hall on May 14<sup>th</sup>. Please feel free to share this recording and the attached resource materials with friends and family. We wish you the best of health and look forward to seeing you in person as soon as it is possible.

To your health,

Drs. Fosburgh, Kormos and Simmons

Here is the link: <https://youtu.be/h360ssa6Kg4>



**Primary Care IMA COVID-19 Town Hall**

COVID-19 Information: General Information, Testing, Immunity, and Getting the Care You Need

May 14, 2020

**Moderator: Susan Edgman-Levitan, PA**  
Executive Director, Stoeckle Center  
for Primary Care Innovation



**Leigh Simmons, MD**  
Internal Medicine Associates

**Blair Fosburgh, MD**  
Medical Director,  
Internal Medicine Associates



**William Kormos, MD**

Medical Lead, Team 3, Internal Medicine Associates



**Juliet Jacobsen, MD**  
Medical Director,  
Continuum Project





## EXAMPLE: MODERATOR TALKING POINTS

Welcome to our (NAME OF PRACTICE OR SERVICE) Town Hall. We are so happy you could join us today. My name is (NAME OF MODERATOR, TITLE AND AFFILIATION). I will moderate our Town Hall today/this evening.

A few housekeeping rules before we get started:

- All participants are muted to eliminate background noise.
- You can view the speaker on your full screen, or you can go to the gallery view in the upper right corner to see all participants.
- If the picture becomes jumpy or out of sync, click “Stop Video” in the lower left corner to speed up your connection.
- For questions, please use the “Chat” feature in the bottom ribbon. Please do not share or ask about personal medical questions on the chat because it can be seen by everyone. If you do have a medical question, please reach out to your doctor directly.
- We look forward to your questions and will do our best to answer them. If we don't have enough time, we will send out more information after the call.

### Introduction of Speakers:

We have excellent speakers today ... I'm going to introduce everyone now so let's get started. In order, we will hear from, (NAMES AND TITLES OF SPEAKERS)

### Q&A Section:

Let's begin with your questions. (SPEAKER NAME TO WHOM THE QUESTIONS IS DIRECTED, READ OR PARAPHRASE THE QUESTION).

### Closing Remarks:

Thank you so much for joining us today/this evening. The recording of the Town Hall will be posted (LIST WEBSITES AND THE ORGANIZATIONS YOUTUBE CHANNEL). If you have topics you'd like to hear more about, please send them to (EMAIL OF PERSON RESPONSIBLE FOR COLLECTING THIS INFORMATION). Have a wonderful afternoon/evening and stay safe!



EXAMPLE: AGENDA (INCLUDES SPEAKER BACKGROUND FOR MODERATOR AND TECHNICAL SUPPORT TEAM)

**Virtual Town Hall on Zoom**

Date: May 14, 2020

Audience: IMA Team 3 patients 65 and over, iCMP patients, their caregivers and families; Clinicians and staff from the IMA, if interested.

Goal: Connect, provide information for our patients and their families about COVID-19, goals of care planning, and how to get care for other conditions.

**AGENDA**

|             |  |           |
|-------------|--|-----------|
| 1:00-1:05pm | Welcome & overview agenda, chat function, intro speakers                                 | Susan E-L |
| 1:05-1:10pm | Welcome from IMA medical director  | Blair F.  |
| 1:10-1:15pm | COVID 19- what to watch for, testing and immunity  | Bill K.   |
| 1:15-1:20pm | Why it is so Important to get care when you need it                                      | Leigh S.  |
| 1:20-1:35pm | What to expect if you are hospitalized & importance of "What matters most" conversations | Juliet J. |
| 1:35-1:40pm | How to do virtual visits   | Blair F.  |
| 1:40-1:55pm | Field questions from the previous list IMA patients sent and from the chat               | Susan E-L |
| 1:55-2:00pm | Thank you to participants  | Blair F.  |

The three resource handouts will be sent with the invitation.

**SPEAKERS:**

Moderator: Susan Edgman-Levitan, Executive Director, Stoeckle Center for Primary Care Innovation, cell phone  
Blair Fosburgh MD, Internal Medicine Associates Medical Director, cell phone  
Bill Kormos MD, Internal Medicine Associates Team 3 medical director, cell phone  
Leigh Simmons MD, Internal Medicine Associates Physician, cell phone  
Juliet Jacobsen MD, Medical Director of The Continuum Project, cell phone

**SUPPORT**

Pat Gavin, Business manager, Stoeckle Center, cell phone  
Kelly Spinelli, Project manager, Continuum Project, cell phone  
Mie Hashimoto, Research Coordinator, Crimson Care, cell phone





## EXAMPLE: HANDOUT #1



FOUNDED BY BRIGHAM AND WOMEN'S HOSPITAL  
AND MASSACHUSETTS GENERAL HOSPITAL

### COVID-19 Community Resources

There are many resources to help you and your family during the COVID-19 (coronavirus) pandemic. Below are resources for food, work, housing, mental health and more.

If you have questions about COVID-19, please call:

- Your primary care physician's office. If you do not have one, you can call the Partners HealthCare COVID-19 Hotline: 617-724-7000.
- Massachusetts Department of Public Health (DPH) Hotline: 617-983-6800. TTY: 617-624-6001.
- The New Hampshire Department of Health and Human Services: 866-444-4211. TTY: 603-634-3388.

If you have questions about help in your community or resources, call 211, a hotline for critical health and human services in your community. Works for Massachusetts and New Hampshire.

#### Food Resources

- **Project Bread**® offers food assistance across Massachusetts. Help is available in 160 languages: Call 800-645-8333 | [www.projectbread.org/get-help/](http://www.projectbread.org/get-help/)

#### Work Resources

- **Massachusetts Department of Unemployment:** If you lost your job because of COVID-19, or because your child's school or care center closed. Call 617-626-6800 | [www.mass.gov/how-to/apply-for-unemployment-benefits](http://www.mass.gov/how-to/apply-for-unemployment-benefits)  
**New, secure application for Spanish speakers:** [www.mass.gov/desempleo](http://www.mass.gov/desempleo)
- **Massachusetts Attorney General's Office:** If you are unable to work because you are sick or must care for a sick family member.  
**Attorney General's Fair Labor Division:** 617-727-3465  
<https://www.mass.gov/service-details/frequently-asked-questions-about-covid-19-employee-rights-and-employer-obligations>
- **Occupational Safety and Health Administration (OSHA)** if you are working in unsafe conditions: 800-321-6742

#### Housing Resources

There is a temporary statewide eviction ban. You may also want to contact your landlord or mortgage company about reducing or deferring your rent or mortgage payments.

- **Housing Consumer Education Center**  
If you are concerned about homelessness prevention resources, such as Residential Assistance for Families in Transition (RAFT): You may be eligible for RAFT even if you are not documented. RAFT Program (PDF): <https://bit.ly/2yqq2qX>



### **Mental Health Resources**

If you are feeling alone, scared, or stressed, reach out to any of the following helplines:

- **The Crisis Text Line:** A free, 24/7 helpline to support those in crisis. Text TALK to 741741.
- **Disaster Distress Helpline**  
A free, 24/7 helpline for crisis counseling and support for people experiencing emotional distress from natural or human-made disasters. Help is available in English and Spanish: 800-985-5990

### **Immigrant Rights and Resources**

Residents of Massachusetts will not be charged for COVID-19 testing. Testing and treatment for COVID-19 will not be counted against immigrants in the Public Charge rule.

- **Massachusetts Immigrant & Refugee Advocacy Coalition (MIRA Coalition)**  
The largest coalition in New England that promotes rights and integration of immigrants and refugees. 800-327-5050 | [www.miracoalition.org](http://www.miracoalition.org)

### **Substance Use – Harm Reduction Resources**

- If possible, prepare your drugs yourself.
- Wash your hands thoroughly for 20 seconds with soap and water. Keep your surfaces clean and wipe them down before and after use with microbial wipes, alcohol (at least 60%) or bleach.
- Prepare for overdose. Have naloxone on hand.
- Stock up on supplies. Check the link from the Harm Reduction Coalition below for more information:  
[www.harmreduction.org/blog/covid-19-resources-for-people-who-use-drugs-and-people-vulnerable-to-structural-violence/](http://www.harmreduction.org/blog/covid-19-resources-for-people-who-use-drugs-and-people-vulnerable-to-structural-violence/)

For more information on substance use disorder (SUD) treatment, please contact:

- **Massachusetts Substance Use Helpline**  
A statewide, public resource for finding licensed, approved services for substance use treatment and recovery: 800-327-5050 | [www.helplinema.org](http://www.helplinema.org)

### **Personal Safety**

Anyone who has been hurt, or who fears for their life or the lives of their children, or is otherwise in immediate danger, should call 911. Many resources are available:

- **SAFELINK** (Massachusetts domestic violence hotline)  
Anyone not in immediate danger can speak to a counselor at the SAFELINK hotline. Phones are answered **24 hours/day**:  
**877-785-2020**





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- **U.S. National Domestic Violence Hotline**  
800-799-SAFE (7233), TTY: 800-787-3224  
<http://www.thehotline.org/>
- **Commonwealth of Massachusetts (Mass.gov)**  
For a list of programs in Massachusetts:  
[www.mass.gov/service-details/domestic-violence-programs](http://www.mass.gov/service-details/domestic-violence-programs)



EXAMPLE: HANDOUT #2



Dementia Care  
Collaborative

Education and  
Support for Patients,  
Caregivers, Clinicians

## Ageless Grace Classes through Mass General Hospital

### What is Ageless Grace?

In a nutshell it's a playful seated movement class that is done with upbeat music. When we combine music and movement we can sometimes find our way to a bit of Magic! We can get out of our minds (for a little while) and into our bodies. Into the present moment.

It offers a time and space to be in community and reduce the sensation of social isolation that so many of us are feeling right now. Classes are offered in a light-hearted way to foster a sense of community and connection, joy and ease.

This wellness program is based on the science of neuroplasticity - the basic idea that the brain and nervous system have the ability to change form and function. There are 21 different exercises that are all done seated, to music to stimulate the body:brain connection. The program is based on play. Ageless Grace exercises address many factors: joint mobility, spinal flexibility, right-left brain coordination, bone density, balance, confidence, kinesthetic learning and systemic health.

Every BODY is welcome. These movement are done seated and accessible to most everyone.

Norie Mozzone, Program Coordinator, MGH Dementia Care Collaborative and Certified Ageless Grace Educator offers class every **Tuesday and Friday at 10:30am**. For more information, contact Norie Mozzone at [nmozzone@mg.harvard.edu](mailto:nmozzone@mg.harvard.edu).

**Click on the Zoom below link to join the fun. Class starts at 10:30 and is an hour long. Feel free to join five minutes early to get your bearings and get setup.**

<https://partners.zoom.us/j/245929692>

Please wear comfortable clothes you can move in and have some water handy. Hydration is important.

Watch a [sample of Ageless Grace](#) during "Staying Healthy at Home during COVID: Brain Health, Eating Well, and Exercise," a program offered by MGH's Senior Health. Enjoy the whole offering, but if you want to get right to Ageless Grace, it begins at 37:22.





EXAMPLE: HANDOUT #3

## Planning Steps for Patients & Families During the COVID-19 Crisis

The global Coronavirus (COVID-19) pandemic presents new challenges. It is important to think in advance about what you would want if you get sick with Coronavirus. This includes the kind of care you would want if you were hospitalized and how to prepare for a hospital stay.

**We are all in this together. By taking steps to plan now, you can help your family, friends, and medical providers.**

### Stop the spread

Everyone should practice social distancing, wash hands often, and cover coughs and sneezes. This means:

- You must follow any “stay-at-home” advisories from your state, city, or town.
- Stay in touch with friends and family over the phone, video, and other social media.
- People may look well and feel well and still be able to spread the virus.
- If you have children, do your best to keep them healthy and active, but please remember playgrounds are closed for a good reason. Kids should only spend time with their siblings and immediate family.
- When you have to leave home to shop for groceries and other essentials, try to shop at times when stores are not crowded. Wash your hands before and after handling items in stores, and after you leave.
- Stay healthy - get exercise, take walks, spend time outside every day. Try to stay at least 6 feet away from people outside your family when you do spend time outside. Take good care of yourself.
- Everyone should cover their mouth and nose with a tissue when they cough or sneeze. Throw used tissues in a trash can lined with a disposable bag. Then, immediately wash hands. Cough or sneeze into the inside of your elbow if a tissue is not available.
- Everyone should wash hands frequently with soap and water for at least 20 seconds. Rub the fronts and backs of hands, and the spaces between all fingers, the whole time. Then rinse with water. If soap and water are not available, clean hands with an alcohol-based hand sanitizer that contains at least 60% alcohol, covering all surfaces of each hand, and rubbing them together until they feel dry.
- Cover your mouth and nose with a cloth face cover when around others. You could spread COVID-19 to others even if you do not feel sick. Everyone should wear a cloth face cover when they have to go out in public, for example to the grocery store or to pick up other necessities. Cloth face coverings should not be placed on young children under age 2, anyone who has trouble breathing, or is unconscious, incapacitated or otherwise unable to remove the mask without assistance.

### Your Medications

- Make a list of your medications (name, dose, etc.) and keep it on hand.
- Plan for refills, and contact your clinic, hospital, or pharmacy now.
- Call your pharmacy to see if your medicines can be sent to your home.

### Your Money and Bills

- Choose someone you trust who could help with your money and bills.
  - Make sure they know how to access your financial information and accounts, including passwords.
- Beware of scams. Do not give strangers information about your money.



- If you receive Social Security, your money will still come ([www.ssa.gov/coronavirus/](http://www.ssa.gov/coronavirus/)).
- The Patient Advocate Foundation can help you find resources to help lessen the financial burden of medical treatment (<https://www.patientadvocate.org>).

### Your Pets

- Choose someone who could take care of your pets.
  - Make sure they have the name of your vet, instructions on caring for your pet, and a list of your pet's medical issues.
  - Give them a house key, in case they need to get in to care for your pet.
- Ask your pet store to deliver pet food and supplies, or use an online ordering service (e.g., [Chewy.com](http://Chewy.com)).

### Your Medical Care Plan: Three Action Steps

#### 1. Share your wishes about the care you want.

***This is MOST important.***

- Think about what is most important in your life: family, pets, hobbies, etc.:
    - **Cake** is a planning tool that can help you explore, document, and share all your health, legal, funeral, and legacy decisions ([www.joinCake.com](http://www.joinCake.com)).
    - This can be a difficult exercise, but planning can make it easier for your family to make decisions, if necessary.
  - Think about what you want for your medical care:
    - Talk with your health care proxy (medical decision maker), family or friends, as well as your medical provider, about the care you want.
    - **Prepare for your Care** is a website that shows you how to have these conversations ([www.prepareforyourcare.org](http://www.prepareforyourcare.org)).
  - Consider sharing your wishes with your health care proxy (medical decision maker) and others by phone and/or a selfie video. You can also talk to others by video call:
    - WhatsApp ([www.whatsapp.com](http://www.whatsapp.com)); Zoom (<https://zoom.us>); Skype (<https://skype.com>) or FaceTime (a video-call feature on an Apple devices).
    - Download and complete the Massachusetts Medical Orders for Life Sustaining Treatment form (<https://www.molst-ma.org/>)
- #### 2. Choose a “medical decision maker” (health care proxy)
- This person will speak for you if you cannot speak for yourself due to a medical condition. Choose a back-up medical decision maker, if you are able.
  - They can make sure your doctors know about the care you want.
  - Keep their phone numbers on hand.
  - A good medical decision maker is someone who:
    - Can talk to your doctors in person or by phone.
    - Knows your wishes about the care you want and do not want.
    - You trust to follow your wishes.
  - Let your medical decision maker know you chose them for this role.
  - Prepare for Your Care can help prepare you for these discussions ([www.prepareforyourcare.org](http://www.prepareforyourcare.org)).
- #### 3. Consider completing an “Advance Directive”
- This form allows you to name your decision maker and write down what you want for your medical care, in case you cannot speak for yourself due to a medical condition.



- If you already have an advance directive, review it, update it, and share it with your health care proxy (medical decision maker) and your medical provider.
- Advance Directive forms are available at Prepare for Your Care (<https://prepareforyourcare.org/advance-directive>).
  - It is OK if you can't sign the form or get witnesses right now.
  - Reading the form can help you think through what kind of care you want.
  - Filling out the form can help your family and providers know more about the care you want and do not want.
- You can scan/fax, email, or even send a picture of the form from your cell phone to your health care proxy (medical decision maker), medical provider, and others whom you trust.

### Hospital Stay and New Hospital Policies

A hospitalization during the Coronavirus pandemic may be quite different from what patients and families are used to. Things that may be different:

- You may not be able to talk to your regular doctor in person, only by phone.
- No visitors will be allowed except in special circumstances.
- You may be taken to a hospital other than the one where you usually get your care.

Sometimes patients need to be in the intensive care unit and put on a breathing machine (ventilator) when they are hospitalized with Coronavirus.

- Research shows that most people who require a ventilator will need to stay on it for several weeks, possibly more.
- People on a ventilator are not able to talk.

It is helpful to prepare a list, in advance, of what you would need to bring from home. The following suggestions will help you get started.

#### ▪ Papers and information:

- Phone numbers, key contacts to give your medical providers, including the person(s) you designate as your medical decision maker(s) (*see Step 2, above*)
- List of your medications (or bring the pill bottles)
- Advance directive or medical wishes information (*see Step 3, above*)
- Plans for your pets or bills

#### ▪ Equipment:

- **Phone, tablet and/or computer and their chargers.** These devices can help you stay connected to family and friends
- Glasses, hearing aids, dentures, and other such items
- Ear plugs, sleep masks, books, and clothing

### Links to More Information and Resources

**Additional guidance** for you and your family on preventing the spread of Covid-19 can be found on the [CDC website](#). Helpful materials on safely caring for a sick family member at home are also available at the links below:

- [Caring for Yourself or a Family Member with Covid-19](#)



- [Home precautions](#)
- [Preventing spread of virus](#)
- [How to clean and disinfect your home](#)
- [Symptoms of Coronavirus](#)
- [Are You At Higher Risk for Severe Illness?](#)
- [Preventing getting sick](#)
- **Family Conversation Support Tools: Determining the Care You Want**
  - Prepare for Your Care: Step-by-step program with videos <https://prepareforyourcare.org/welcome>
  - Cake: Explore, document, and share health, legal, funeral, and legacy decisions in an end-of-life plan [www.joinCake.com](http://www.joinCake.com)
  - Hello conversation game from Common Practice <https://commonpractice.com>
  - Respecting Choices COVID-19 Resources <https://respectingchoices.org/covid-19-resources>
  - Can We Talk About What Matters to Me? Tip sheet from National Patient Advocate Foundation <https://www.npaf.org/can-we-talk/>
- **Additional Support Tools**
  - National Patient Advocate Foundation COVID-19 Action Center: Advocacy and policy information <https://www.npaf.org/patients-and-caregivers/covid19/>
  - Patient Advocate Foundation: Resources and services to guide patients and families through complex health care challenges <https://www.patientadvocate.org/>
  - Staying Calm and Strong in the Shadow of COVID-19: Courageous Parents Network Video <https://courageousparentsnetwork.org/videos/cpn-talks-with-counselor-maryfrances-garber-on-staying-calm-and-strong-in-the-shadow-of-covid>

The development of this guide was a partnership between Partners Healthcare System, serious illness specialists, and the National Patient Advocate Foundation



EXAMPLE: CHECK LIST

| Town Hall Event Checklist |   |                        |                |
|---------------------------|---|------------------------|----------------|
| Phase                     | Task  | Individual Responsible | Date Completed |
| Planning                  | <b>Planning Town Hall</b>   |                        |                |
| Planning                  | Meet with clinic leadership to review goals and objectives of Town Hall event - go / no go  |                        |                |
| Planning                  | Confirm speakers, content and date/time of event  |                        |                |
| Planning                  | Request title, headshots and contact information of speakers  |                        |                |
| Planning                  | Determine patient population to invite to event   |                        |                |
| Planning                  | Identify source for obtaining patient list and demographic information  |                        |                |
| Planning                  | Reserve zoom link (1 ½ hours - includes 30 minutes prior to event)<br>- set up waiting room for patients<br>- mute all patients upon entry<br>- do not allow screen sharing<br>- record session - speaker view only                               |                        |                |
| Planning                  | Send invitation to identified patient population (include presenter information and zoom link)  |                        |                |
| Planning                  | Record number of invitations sent   |                        |                |
| Planning                  | Send zoom link and final agenda to speakers, support staff and other invitees (non-patients)  |                        |                |
| Day of Event              | <b>Date of event:</b>   |                        |                |
| Day of Event              | Presenters and support staff sign-in to zoom 20-30 minutes prior to event<br>- test technology<br>- review final agenda and flow of presentations<br>- answer any final questions   |                        |                |
| Day of Event              | Zoom<br>- everyone muted other than speakers<br>- double check screen sharing is not available to invitees<br>- if video gets jumpy, turn off everyone's video<br>- record session - in speaker view<br>- invitees in waiting room prior to start |                        |                |
| Day of Event              | Record number of connected viewers/patients   |                        |                |
| After Event               | <b>After event:</b>   |                        |                |
| After Event               | Edit recording as necessary   |                        |                |
| After Event               | Create thumbnail to include with YouTube video  |                        |                |
| After Event               | Upload thumbnail and edited recording to YouTube  |                        |                |
| After Event               | Post YouTube video to websites  |                        |                |
| After Event               | Send thank you/ follow-up email to identified patient population with YouTube link, handouts, future Town Hall dates  |                        |                |
| After Event               | Monitor number of YouTube views and comments  |                        |                |
| Contacts                  | <b>Support team contact information:</b>  |                        |                |
| Contacts                  | Name and Cell Number  |                        |                |
| Speakers                  | <b>Speakers contact information:</b>  |                        |                |
| Speaker 1                 |   |                        |                |
| Title                     |   |                        |                |
| Cell Number               |   |                        |                |
| Speaker 2                 |   |                        |                |
| Title                     |   |                        |                |
| Cell Number               |   |                        |                |