

Creating a Care Plan: AFTER THE CONVERSATION



COMPLETE & SHARE DOCUMENTS

Congratulations! You have overcome a significant hurdle by starting a life-planning conversation with your loved one, or even beginning to consider your own wishes. Every attempt to have this talk has immense value, and the knowledge you acquire will make each future discussion easier.

As mentioned in the introductory presentation, the paperwork for planning medical and end-of life care and legal and financial preferences can be complex. Some forms designate a person (or multiple people) to act on your loved one’s behalf, and other documents allow your loved one to describe what they wish to happen when they are incapacitated. Still other types of paperwork may both record your loved one’s wishes and appoint someone to enact them.



Terminology reminder: When someone has neither a power of attorney or nor a health care directive, and they cannot make informed decisions or care for themselves, options include court-appointed **guardianships** (to manage care and quality-of-life decisions) or **conservatorships** (to handle financial matters).

Documents That Designate

These forms (on page 12) enable someone to act on behalf of your loved one when they are incapacitated.

The process of establishing a legal, medical, or financial power of attorney is subject to state-specific laws. Be sure to check the requirements for your loved one’s state – or states – of residence.

Document	Date Completed	Representative
Medical Power of Attorney		
Mental Health Power of Attorney		
Financial Power of Attorney		
Conservatorship/Guardianship		
Other: _____		

Documents That Describe

These forms (on page 24) allow your loved one to state their wishes.

Document	Date Completed	Responsible Parties (If Applicable)
Living Trust		
5 Wishes Booklet		
Living Will		
Do Not Resuscitate Form (DNR or Prehospital Medical Directive)		
Provider Orders for Life-Sustaining Treatment Form (POLST Form)		
Organ Donation Registration		
Other: _____		
Other: _____		

Protect Documents

Make multiple copies of these documents, and store them in *safe, accessible, and portable* locations.

SAFE

The documents should be protected from theft, fire, flood, and other natural disasters.

ACCESSIBLE

Give copies of the documents to anyone who may act as your or your loved one's power of attorney, or anyone who is designated to make decisions on your loved one's behalf, such as a health care provider or financial and legal advisor – in other words, anyone listed above as a representative, designee, or responsible party.

Be sure you tell other people where the original documents are located, even if you have given them a copy. Some documents can be stored in secure digital records systems. Health care directives can often be filed with local organizations such as hospitals and government agencies.

Warning: In many states, a bank will seal a safe deposit box upon a person's death, so you may not be able to access any documents stored inside. Likewise, if you need a key, combination, or numerical code to access any documents, be sure someone they trust knows about them.



Important: The Do Not Resuscitate Form needs to be printed on the designated paper color and placed where emergency medics can easily find it. Check with your loved one’s local agencies to determine where local authorities prefer this form be located. In Arizona, the appropriate form and instructions are housed on the state [attorney general’s website](#).

In many states, your loved one may also complete a Provider Orders for Life Sustaining Treatment Form, or POLST, which covers not only resuscitation wishes, but also additional end-of-life directives. Like the DNR, this form also needs to be printed on a specific color of paper and placed in a specific location. In Arizona, you can also download this form from the state [attorney general’s website](#).

PORTABLE

Consider bringing pertinent paperwork when you and your loved one travel. Depending upon your situation, you may want to make sure your documents are available wherever you and your loved one are.

Tips: Store all the documents in a binder, so the information is centralized and mobile. Schedule a time to review the binder and make sure all information is current once per year.

WHO HAS COPIES?

Document	Location of Original Document	Person With Copies



SHARE WISHES FURTHER

What details need to be shared, and with whom? To ensure that everyone is on the same page, consider sharing your loved one's wishes with those who are impacted by, but not necessarily involved in, the caregiving plan.

Person Involved	Details Shared



SCHEDULE NEXT DISCUSSION

Even if you start with one topic, you may find that other caregiving, financial, or legal matters need to be discussed.

What is the next priority?

What is the next most urgent issue?

Based on this conversation, what actions do you need to take?

When can you schedule the next talk?
