

IF YOU COULDN'T SPEAK FOR YOURSELF, Who Would Speak for You?

A Simple Health Care Proxy & Advance Care Planning Conversation Guide

Choosing a person is important. Helping that person understand you is just as important.

What Is a Health Care Proxy?

A health care proxy - also called a health care agent, representative, or surrogate in different places - is someone you choose to help make health care decisions if you become unable to communicate or make those decisions yourself. The legal document and terminology used to appoint that person vary by state.

This guide is not the legal form. It is a conversation and preparation tool to help you think about who you trust, what matters to you, and what you want that person to know.

Start With the 3 C's

CONTENT - What do I need to KNOW?

What does the role involve? What does my state's form require? What questions should I ask my doctor or another professional?

COMPASSION - What do I need to UNDERSTAND?

What matters most to me? What are my values, fears, beliefs, priorities, and ideas about quality of life?

CONNECTION - Who or what do I need to REACH?

Who do I trust to speak for me? Who else should know my wishes? Do I need to speak with my doctor, family, attorney, or another professional?

Before you assume someone knows what you want - have the conversation.

Choosing the Person Who May Speak for You

You do not have to choose the person who is closest to you simply because they are family. Think about who can understand your wishes and speak for them when needed.

- ☐ Do I trust this person to respect my wishes, even if their own wishes would be different?

- ☐ Can I talk openly with this person about health, serious illness, treatment, dying, and what matters to me?

- ☐ Can this person ask questions, seek clarification, and speak up with health care professionals?

- ☐ Could this person handle disagreement or pressure from other family members or friends?

- ☐ Would this person be willing and reasonably available to take on this responsibility?

- ☐ Have I actually asked this person if they are willing to serve?

- ☐ Who could serve as an alternate or backup if my first choice is unavailable?

My first choice:

My alternate choice:

What Would I Want Them to Know About Me?

A legal form cannot describe every situation that could arise. Your conversations can help the person you choose understand how you think and what matters to you.

What does a good quality of life mean to me?

What abilities, relationships, routines, or experiences are especially important to me?

What am I most concerned or afraid about if I become seriously ill or unable to communicate?

Are there treatments, situations, or outcomes I feel strongly about and want to discuss with my doctor?

Are there religious, spiritual, cultural, or personal beliefs I want considered?

Who else would I want included in important conversations?

Are there people I would want my agent to consult before making a difficult decision?

What would I want my family to remember if they were struggling with a decision on my behalf?

Have the Conversation - Then Make It Official

Once you have thought about your wishes and chosen the person you trust, use the appropriate advance directive or health care decision-making form for your state. Requirements can differ, including who may serve, witnessing or notarization rules, and the name of the document.

- ☐ Ask the person if they are willing to serve.
- ☐ Talk about your values, priorities, and wishes - not just the form.
- ☐ Ask your doctor questions about your health and the kinds of decisions that could arise.
- ☐ Complete the correct form for your state and follow its signing instructions.
- ☐ Name an alternate if the form allows it and you choose to do so.
- ☐ Give copies to the person you chose and appropriate health care providers.
- ☐ Tell trusted loved ones who you selected and where the document can be found.
- ☐ Review the plan periodically and after major life, relationship, location, or health changes.

A completed document matters. An informed person who understands your wishes matters too.

My Next Conversation

The person I want to speak with:

What I want them to understand about me:

A question I want to ask my doctor or another professional:

Important: Health care proxy, medical power of attorney, health care agent, and advance directive terminology and legal requirements vary by state. This guide is educational and is not a legal document or legal advice. Use the appropriate form and instructions for your state, and seek qualified legal or health care guidance when needed.

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