

# Designating a Health Care Proxy

This playbook describes the steps to appoint a health care proxy, who will have the power to make medical decisions on your behalf if you become incapacitated. It is an important legal document that requires careful consideration and proper execution.

## Step 1: **Choose Proxy**

Select a trusted individual who you want to act as your health care proxy. This should be someone who understands your wishes and is willing to make medical decisions for you if you are unable to do so.

## Step 2: **Discuss Wishes**

Have a detailed discussion with your chosen proxy about your medical preferences, values, and any specific instructions you want to be followed when it comes to your health care.

## Step 3: **Legal Requirements**

Research and understand the legal requirements for a health care proxy in your jurisdiction. Laws vary by location, so knowing the specific requirements for your area is essential.

## Step 4: **Draft Document**

Draft the health care proxy document, which may be called an 'advance directive' or 'medical power of attorney', depending on your

jurisdiction. You can do this yourself, use an online service, or hire an attorney.

## **Step 5: Witnesses & Notary**

Ensure the document is signed in the presence of the required number of witnesses and/or notarized, according to your local laws. These steps are critical for the document to be legally binding.

## **Step 6: Distribute Copies**

Provide copies of the fully executed document to your health care proxy, your doctors, and any relevant family members or friends. Keep the original in a safe but accessible place.

## **Step 7: Review Regularly**

Review and update your health care proxy document regularly or when your health situation or your choices about your health care proxy change.

# **General Notes**

## **Locate Forms**

Local health departments, hospitals, or your primary care provider may have forms and additional resources available to help guide you through the process.

## **Legal Advice**

Consider seeking legal advice to ensure your health care proxy document meets all requirements and accurately captures your wishes.

## Medical Records

Granting your proxy access to your medical records can be helpful and may require additional steps or documents.

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