

Advance Directives Mini-Kit Checklist

Use this mini-kit to choose your decision-maker, spell out your care preferences, grab the right state forms, and make sure everything's easy to find when it counts. Print it, check it off, and you're set to review once a year.

1. Pick Your People

- Primary healthcare agent/proxy (name, phone, email)
- Backup agent (name, phone, email)
- Confirm they've agreed to the role
- Make sure they're calm under pressure, easy to reach, and committed to following your wishes

2. Talk About What Matters

- What makes life meaningful for me?
- What trade-offs would I accept (pain, disability, hospital time)?
- Preferences: CPR, ventilator, feeding tube, ICU vs. comfort care
- Organ and tissue donation wishes
- Religious or cultural values to honor

3. Grab the Right Forms (for your state)

- Healthcare Power of Attorney / Healthcare Proxy
- Living Will / Advance Directive (treatment preferences)
- HIPAA Release (gives your agent access to medical records)
- Physician / Medical Orders for Life-Sustaining Treatment (POLST / MOLST) — (only if your clinician recommends it for serious illness)
- Check your state's rules: Witnesses vs. notary, and who can't serve as a witness

4. Fill Them Out (the smart way)

- Complete forms neatly — full legal name, DOB, and address
- Initial and date each page if required
- Sign with the proper witnesses or notary
- Include HIPAA authorization for your agent
- Keep wording consistent across all forms

5. File, Store, & Share

- Give copies to your agent(s), primary care doctor, and specialists
- Upload PDFs to your patient portals (primary care physician / PCP + hospital system)
- Save a digital copy in a shared folder your agent can access
- Create a wallet or phone card:
  “Advance Directive on file — Agent: [Name, Phone]”
- Add your agent’s info to your phone’s Medical ID / In Case of Emergency (ICE) contacts

6. Make It Easy to Find (even at 2 A.M.)

- Label file: AdvanceDirective_[LastName]_[YYYYMMDD].pdf
- Keep a printed copy in a clearly marked folder at home
- Tell family members where it lives — and who your agent is

7. Add It to Your Care Visits

- Include “Advance Care Planning” in your Welcome to Medicare or Annual Wellness Visit agenda
- Ask your doctor to confirm the documents are in your chart
- Discuss whether a POLST is appropriate (for serious illness or frailty only)

8. Review & Update

- Set a calendar reminder to review yearly
- Update after: New diagnosis, surgery, marriage/divorce, move, or agent changes
- When updating: Sign new forms, share new copies, destroy outdated ones

Quick Reference How-To

Agent Contact Card

Primary Agent: _____ Phone: _____ Email: _____

Backup Agent: _____ Phone: _____ Email: _____

Document Log

Document	Signed	Witness / Notary	Notes
Proxy / POA			
Living Will			
HIPAA Release			
POLST (if any)		Doctor:	

Care Preferences Snapshot

- **CPR:** ☐ Allow ☐ Do not attempt
- **Ventilator:** ☐ Try temporarily ☐ Only if recovery likely ☐ No
- **Tube feeding:** ☐ Short-term trial ☐ Long-term OK ☐ No
- **Care setting:** ☐ Hospital ☐ Comfort care at home
- **Pain control priority:** ☐ Low ☐ Moderate ☐ High (even if sedating)

Conversation Starters

- “If I couldn’t speak, what would you want doctors to know about me?”
- “What outcomes would I consider worse than death?”
- “If time were short, where would I prefer to be?”

Bring to New Appointments

- Copy of proxy and living will
- HIPAA release
- Wallet or phone card updated

Pro Tips

- Use your state's forms — redo them if you move.
- Don't assume "my spouse decides" covers you; most states still require a named agent.
- Aim for complete, not perfect: Done and shared beats ideal and unfinished.

Want the Full Story?

For a deeper dive into how advance directives work—what they are, why they matter, and how to create one—read our full guide:

Advance Directives Explained: What They Are, Why They Matter, and How to Create One



We work with multiple Medicare plan carriers including:

Aetna Inc. • Devoted Health, Inc. • Humana Inc. • Mutual of Omaha Insurance Company

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Enrollment in a plan may be limited to certain times of the year unless you qualify for a Special Enrollment Period or are in your Medicare Initial Enrollment Period.

Medicare Advantage and Part D plans are insured by a Medicare Advantage HMO, PPO and PFFS organization with a Medicare contract and/or a Medicare-approved Part D sponsor. Enrollment depends on the plan's contract renewal with Medicare.

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