

Healthcare Directive Checklist

A step-by-step guide to preparing your advance directive and protecting your medical wishes.

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What Is a Healthcare Directive?

A Healthcare Directive — also known as a Living Will or Advance Directive — is a legal document that communicates your wishes regarding medical treatment if you become unable to speak for yourself. It tells your doctors and family exactly what you want and do not want in terms of life-sustaining treatment, pain management, organ donation, and end-of-life care.

Without a Healthcare Directive, your family may face agonizing decisions about your care with no guidance. Disagreements among family members can lead to court intervention, delayed treatment, and lasting emotional damage.

A Healthcare Directive removes ambiguity. It ensures your wishes are honored, your family is protected from impossible choices, and your medical team has clear instructions.

Healthcare Directive vs. Healthcare POA

Document	Purpose	When It Applies
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Healthcare Directive	States your treatment preferences in writing	When you cannot communicate and a specific medical situation arises
Healthcare POA	Names a person to make decisions for you	When you cannot make or communicate medical decisions

Best practice: Have both. The Healthcare Directive provides the instructions. The Healthcare POA provides the decision-maker for situations not covered by the directive.

Key Decisions to Address

Your Healthcare Directive should clearly state your wishes on:

- **Life-sustaining treatment** — mechanical ventilation, feeding tubes, dialysis
- **Resuscitation** — CPR and Do Not Resuscitate (DNR) preferences
- **Pain management** — comfort care priorities, even if it may hasten death
- **Organ and tissue donation** — your wishes and any limitations
- **Experimental treatments** — willingness to participate in clinical trials
- **Religious or spiritual considerations** — any faith-based treatment preferences
- **Specific conditions** — terminal illness, permanent unconsciousness, advanced dementia

The HIPAA Authorization

Under federal HIPAA privacy rules, healthcare providers cannot share your medical information with anyone — including your spouse or children — without your written authorization. A HIPAA Release form allows the people you designate to access your medical records, communicate with your doctors, and stay informed about your care.

This should be included with your Healthcare Directive and Healthcare POA as a standard part of your estate planning package.

How to Complete Your Directive

Step 1: Reflect on your values and medical preferences. Consider discussing these with your doctor.

Step 2: Complete the directive document, addressing each key decision area above.

Step 3: Sign the document in accordance with your state's requirements (notarization, witnesses, or both).

Step 4: Distribute copies to your healthcare agent, primary care physician, hospital, and close family members.

Step 5: Review and update every 2-3 years or after any major health event, hospitalization, or change in your wishes.

Storage and Communication

Your Healthcare Directive is useless if no one can find it during an emergency. Keep the original in a secure but accessible location and ensure the following people have copies:

- Your healthcare agent (primary and successor)
- Your primary care physician
- Your local hospital
- Your estate planning attorney or advisor
- Close family members who may be present in an emergency

Do NOT keep your Healthcare Directive only in a safe deposit box. In an emergency, no one may be able to access it. Keep an accessible copy at home and provide digital copies to your healthcare agent.

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